AIRI
Association of Independent Research Institutes™
Virtual
September 14-16
2020 ANNUAL MEETING
1. Kathy Alexion, IT Track Co-Leader, Vice President & Chief Information Officer, Fred Hutchinson Cancer Research Center
2. Michael Annichine, Pilot Operations Track Co-Leader, Chief Executive Officer, Magee-Womens Research Institute
3. Helen Behn, Pilot Operations Track Co-Leader, Chief of Staff, Magee-Womens Research Institute
4. Jeri Mitchell Bowers, AIRI President-Elect, Director of Development & Public Affairs, MDI Biological Laboratory
5. Kathryn Brown, AIRI Program Co-Chair, Chief of Communications, Howard Hughes Medical Institute
6. Ana Cabrera, Pilot Operations Track Co-Leader, Director, Strategic Operations, Salk Institute for Biological Studies
7. Anthony Carvalloza, IT Track Co-Leader, Associate Vice President & Chief Information Officer, Rockefeller University
8. Kimberly Castillo, Finance Track Co-Leader, Chief Financial Officer, Salk Institute for Biological Studies
9. Frank Dwyer, AIRI Vice President, Senior Director, Information Systems & Technology, Salk Institute for Biological Studies
10. Tim Hassen, AIRI President, Vice President & Chief Financial Officer, Oklahoma Medical Research Foundation
11. Tara Holcomb, Development/PR Track Co-Leader, Senior Director of Philanthropy, Scripps Research
12. Gina Holl, Finance Track Co-Leader, Director, Grants and Contracts, Boyce Thompson Institute
13. Christine Hughes, Development/PR Track Co-Leader, Vice President, Institutional Advancement, Burke Neurological Institute
14. Dave Issing, AIRI Executive Director
15. Don King, IT Track Co-Leader, Senior Director, IT Infrastructure, Scripps Research
16. John Munz, HR Track Co-Leader, Vice President, Human Resources, Lundquist Institute for Biomedical Innovation
17. Libby O'Hare, PhD, AIRI Washington Office
18. Nicole Parker, PhD, AIRI Washington Office
19. Jennifer Pawlosky, AIRI Program Co-Chair, Executive Director, Communications, Allen Institute
20. Katie Raftery, SHRM-SCP, SPHR, HR Track Co-Leader, Vice President, Chief Human Resources Officer, Cold Spring Harbor Laboratory
21. Lari Russo, AIRI Past President, Chief Financial Officer, Cold Spring Harbor Laboratory
22. Joe Trainor, CPA, Finance Track Co-Leader, Chief Financial Officer, Wistar Institute
23. Dagnia Zeidlickis, Development/PR Track Co-Leader, Vice President, Communications, Cold Spring Harbor Laboratory
Monday, September 14

Monday Keynote Session @1pm Eastern (50 minutes)
Politics, Public Trust, & Polarization: Dr. Cary Funk, Director of Science & Society Research at the Pew Research Center

Monday Concurrent Breakouts @2pm Eastern (50 minutes)
1. Finance: Accounting/Tax Update 2020
2. HR: Title IX – It Likely Applies to You
3. IT: Data Management
4. Pilot Operations: Prioritizing Diversity in the Workplace: Building an Office of Equity & Inclusion
5. PR: Is There a New Balance Between Print and Digital Communications?

Monday Keynote Session @3pm Eastern (50 minutes)
AIRI 2020 Public Service Award Presentation to Dr. Anthony Fauci, Director of the National Institute of Allergy and Infectious Diseases (NIAID)

For keynote sessions, questions may be submitted through the “Q&A” feature. Please be sure to have renamed yourself with your full name and affiliation.

Upon arrival to all breakout sessions, please
1. Rename yourself with your full name & affiliation via the Participant window;
2. Turn off your Video & Mute yourself;
3. Turn on the Hide Non-Video Participants option (via Videos)
4. Select Gallery view
5. To submit a question, use either the Chat window, or Raise Your Hand.

Tuesday, September 15

Tuesday Keynote Session @1pm Eastern (50 minutes)
Big Bets in Biomedical Innovation: Ms. Esther Krofah, Executive Director, FasterCures

Tuesday Concurrent Breakouts @2pm Eastern (50 minutes)
1. Development: How Do We Fundraise in a Virtual World?
2. Multi Tracks: Governance, Leadership and Risk Management During a Crisis
3. HR: Mental Health Challenges During a Pandemic – What’s an Organization to Do?
4. IT: Leveraging Technology to Ensure a Safe and Effective Work Force During the COVID Pandemic
5. PR: Best Practices in Communicating Outside of Your Comfort Zone

Tuesday Concurrent Breakouts @3pm Eastern (50 minutes)
1. Development: How Do We Connect and Stay Connected to Donors in a Virtual World?
2. Finance: Institutional Compliance
3. HR: Picture a Scientist – Behaviors & Barriers to Diversity
4. IT: Information Security Open Forum
5. Pilot Operations: How to Adhere to Success Metrics During Rapid Changes & Societal Shifts?

Tuesday Virtual Café @4pm Eastern (30 minutes)
Meet members of the AIRI Board and find out how to get involved in AIRI. This is an informal virtual gathering.

Wednesday, September 16

Wednesday Keynote Session @1pm Eastern (50 minutes)
AIRI Annual Business Meeting
AIRI Washington Report

Adjourn
**Monday Keynote Session @1**  
1:00pm – 1:50pm Eastern

**President’s Welcome to AIRI 2020**  
Monday, 1:00pm – 1:50pm

AIRI President Tim Hassen, Vice President & Chief Financial Officer at the Oklahoma Medical Research Foundation will open this year’s annual meeting by welcoming everyone to the AIRI 59th Annual Meeting.

**Politics, Public Trust, and Polarization**

As the nation prepares to vote in the November 2020 election, the role of science in society and in policymaking is of concern to many in AIRI and the broader biomedical research community. Drawing on the Pew Research Center’s extensive data, this session will examine public attitudes and trends that inform the current political moment in American society and the implications these have for the role of science in policy making.

**Keynote Speaker:** Dr. Cary Funk, Director of Science & Society Research, Pew Research Center; and Alec Tyson, Associate Director of Research, Pew Research Center; **Moderators:** Kathryn Brown, AIRI Program Co-Chair, Chief of Communications, Howard Hughes Medical Institute; and Jennifer Pawlosky, AIRI Board Director, AIRI Program Co-Chair, Executive Director, Communications, Allen Institute

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**Monday Concurrent Breakouts @2**  
2:00pm – 2:50pm Eastern

**Finance Track**

**Accounting/Tax Update 2020**  
Monday, 2:00pm – 2:50pm

Moss Adams will present an accounting and tax update to include the latest information and guidance on everyone’s favorite topic, PPP and other COVID-related federal programs. With the deferred implementation of several FASB standards, the accounting update will take a bit of a twist to look at some common struggles with current/recent accounting and reporting items, as well as best practices that Moss Adams has identified.

**Panelists:** Scott Simpson, Audit Partner, Moss Adams; Wendy Campos, Tax Partner, Moss Adams Tax; **Facilitator:** Christine Aiello, Senior Director of Finance, The Salk Institute for Biological Studies

Questions may be submitted through the “Q&A” feature. Please be sure to have renamed yourself with your full name and affiliation.
HR Track

**Title IX – It Likely Applies to You**
Monday, 2:00pm – 2:50pm

A review of new Title IX regulations on sexual harassment which were issued in May 2020 and become effective August 14, 2020.

**Presenter:** Debbie Osgood, Partner, Hogan, Marren, Babbo & Rose;  
**Facilitators:** John Munz, AIRI HR Co-Track Leader, Vice President, Human Resources, The Lundquist Institute; and Katie Raftery, AIRI HR Co-Track Leader, Vice President, Human Resources, Cold Spring Harbor Laboratory

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PR Track

**Is There a New Balance Between Print and Digital Communications?**
Monday, 2:00pm – 2:50pm

In this public relations and communication session, we’ll discuss balancing between these two primary forms of communication – both internally and externally. We’ll also look at what your 2020 Annual Report is going to look like?

**Discussion Moderator:** Dagnia Zeidlickis, AIRI PR Co-Track Leader, Vice President, Communications, Cold Spring Harbor Laboratory

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IT Track

**Data Management**
Monday, 2:00pm – 2:50pm

With the advent and continued growth of data-intensive instrumentation such as cryo-electron microscopy and next-generation sequencing, AIRI institutions are continuing to struggle with developing practical methods to ensure that research data is findable, accessible, interoperable, and reusable. Indeed, since this topic was introduced in last year’s annual meeting, it has been the most requested session topic by the AIRI membership, which only demonstrates the continue importance of - and challenges implementing - a data management program. This session will update attendees on two AIRI institutions’ lessons learned in their journey of implementing data management within the past year, as well as feature the advice and perspective of a guest speaker with experience implementing data management at research institutions program.

**Panelists:** Sean Bethune, Chief Technical Officer and Co-Founder, LinksPath Applied Analytics; Melanie Davis, Director of Enterprise Systems and Informatics, Noble Research Institute; and Scott Pegg, PhD, Chief Information Officer and Vice President of Research Infrastructure, Gladstone Institutes; **Moderator:** Kathy Alexion, AIRI IT Co-Track Leader, Chief Information Officer and Vice President, Information Technology, Fred Hutchinson Cancer Research Center
**Pilot Operations Track**

**Prioritizing Diversity in the Workplace: Building an Office of Equity & Inclusion**

Monday, 2:00pm – 2:50pm

Building an Office of Equity & Inclusion: Why we did it, how it has evolved, upcoming initiatives, ongoing opportunities, and long-term goals.

*Speaker:* Mallory Zaslav, Vice President of Equity and Inclusion, The Salk Institute for Biological Studies; *Facilitator:* Helen Behn, AIRI Pilot Operations Co-Track Leader, Chief of Staff to Michael Annichine, Magee-Womens Research Institute and Foundation

**AIRI 2020 Official Sponsors**

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**Monday Keynote Session @3**

3:00pm – 3:50pm Eastern

**AIRI 2020 Public Service Award Presentation to Dr. Anthony Fauci**

Monday, 3:00pm – 3:50pm

AIRI is pleased to award the 2020 Public Service Award to Dr. Anthony Fauci, Director of the National Institute of Allergy and Infectious Diseases (NIAID), in recognition of his exemplary leadership of the nation’s biomedical research enterprise during the novel coronavirus pandemic and his championship of issues important to independent research institutes. The Public Service Award is AIRI’s highest honor and this year’s recipient epitomizes outstanding leadership in promoting biomedical research and evidence-based policymaking. As the nation’s top expert on infectious disease, Dr. Fauci used his role on the White House Coronavirus Task Force to ensure the nation’s federal, state, and local government leaders made decisions for the country based on the latest scientific data. In addition, he continues to dedicate his time to publicly communicate the gravity of the pandemic and the need for the American public to do their part to stop the spread of COVID-19. During this session, Dr. Fauci will discuss efforts underway at the National Institutes of Health (NIH) to respond to COVID-19 and the future of pandemic preparedness in the scientific community.

Presented by AIRI President Tim Hassen, Vice President & Chief Financial Officer at the Oklahoma Medical Research Foundation.

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Tuesday Keynote Session @1
1:00pm – 1:50pm Eastern

**Big Bets in Biomedical Innovation**
Tuesday, 1:00pm – 1:50pm

As the scientific community seeks to accelerate the pace of biomedical discovery, funders—including philanthropy and the federal government—have sought to invest in projects that represent high risk but promise high reward. During the COVID-19 pandemic, scientists have been pushed to produce breakthrough discoveries at accelerated speeds spurring cross-sector collaboration to improve scientific discovery. What does the future of biomedical research innovation look like in a post-COVID environment? How can we best foster innovation and collaboration to improve human health and well-being? In this session, Ms. Esther Krofah will examine these issues and discuss FasterCures’ work in the fight against COVID-19.

**Speaker:** Ms. Esther Krofah, Executive Director, FasterCures; **Moderator:** Jeri Mitchell Bowers, AIRI President-Elect, Director of Development & Public Affairs, MDI Biological Laboratory

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Tuesday Concurrent Breakouts @2
2:00pm – 2:50pm Eastern

**Development Track**

**How Do We Fundraise in a Virtual World?**
Tuesday, 2:00pm – 2:50pm

We all know the challenges, so this session will focus on the opportunities and how we are writing the playbook for staying relevant, communicating the mission and raising money. Join us and share your successes and failures during these unprecedented times. This will cover transformational and major gifts, annual funds, and events.

**Discussion Moderator:** Christine Hughes, AIRI Development Co-Track Leader, Vice President, Advancement, Burke Neurological Institute; **Producer:** Sophia Bourgeois, Advancement Associate, Burke Neurological Institute
Multi Tracks (Crosscutting panel in conjunction with Operations, Finance, IT, & HR)

**Governance, Leadership and Risk Management During a Crisis**
Tuesday, 2:00pm – 2:50pm

Things we learned from dealing with shutdown, working remotely and demonstrations. Session will address leadership style and guidance, remote workforce management and the impact/implications for your institute; short & long term "re-opening" plans & best practices; rebudgeting and financial risk management planning (salaries, insurance coverage, investment portfolios, reduced budgets); maintaining internal controls while working remotely; and surviving a remote audit process.

**Panelists:** Sara Arvay, Director of Grants and Operations, Magee-Womens Research Institute & Foundation (Operations), Sophia Darling, AIRI Board Secretary, Vice President for Finance & Operations, Boyce Thompson Institute (Finance); Frank Dwyer, AIRI Vice President and Member Communications, Senior Director of IT Operations, The Salk Institute for Biological Studies (IT); Kristy Arrington, Director of People & Culture, Janelia Research Campus, Howard Hughes Medical Institute (HR); **Facilitator:** David Cabrera, AIRI Board Director, Chief of Staff, Office of the Chief Scientific Officer, Van Andel Institute

**IT Track**

**Leveraging Technology to Ensure a Safe & Effective Work Force During the COVID Pandemic**
Tuesday, 2:00pm – 2:50pm

The COVID pandemic has led to a dramatic shift in the way the world works, as well as catalyzed the need for new tools, technologies, and processes in order to ensure a safe and compliant workforce. AIRI institutions have been on the forefront of responding to this change, and have a particularly unique set of circumstances, as we have had to support both a remote administrative workforce often in addition to an on-campus cohort that continues to work on finding the cure and moving research forward. This session will discuss and demonstrate methods and practices that a few leading AIRI institutions have implemented to continue operations during the COVID pandemic.

**Panelists:** Robert Gruhn, Director Information Services and Applications, The Lundquist Institute; Tom Kluge, Principal Product Manager, Fred Hutchinson Cancer Research Center; Vijay Sureshkumar, Director, Technology Partnerships, Fred Hutchinson Cancer Research Center; and Jessica Witt, Director, IT Applications and Development, The Stowers Institute for Medical Research; **Moderator:** Anthony Carvalloza, AIRI IT Co-Track Leader, Chief Information Officer, The Rockefeller University

**IT Track Sponsored by**

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HR Track

**Mental Health Challenges During a Pandemic – What’s an Organization to Do?**
Tuesday, 2:00pm – 2:50pm

A review of the mental health challenges organizations are facing during these days of the pandemic and social unrest and actions they are taking to address them.

*Presenter: Kathleen Schulz, MS, CHES, Divisional Vice President, Global Innovation Leader, Organizational Wellbeing; Facilitator: John Peck, Director, Human Resources Operations, Gladstone Institutes*

PR Track

**Best Practices in Communicating Outside of your Comfort Zone (i.e. social unrest)**
Tuesday, 2:00pm – 2:50pm

This session will focus on the opportunities and how we are writing the playbook for staying relevant and communicating the mission. We’ll cover when Covid-19 is not in your research portfolio; communicating internal policy externally; and is there a role for AIRI?

*Discussion Moderator: Dagnia Zeidlickis, AIRI PR Co-Track Leader, Vice President, Communications, Cold Spring Harbor Laboratory*

**Tuesday Concurrent Breakouts @3**
3:00pm – 3:50pm Eastern

HR Track

**Picture a Scientist – Behaviors & Barriers to Diversity**
Tuesday, 3:00pm – 3:50pm

Participants in this breakout session are asked to preview the 95-minute film, “Picture a Scientist”, prior to the session. The special AIRI screening room and password will be provided to participants prior to the conference., the film’s Producer & Co-Director will kick off a moderated discussion about the film to explore the ways that explicit and implicit bias and discriminatory behaviors become embedded into organizational culture.

*Presenter: Sharon Shattuck, Producer and Co-Director, Picture a Scientist; and Manette Pottle, Producer, Picture a Scientist; Moderators: Judy Burke, Senior Director, Human Resources, Allen Institute; and Hannah Goulding, Senior Director, Human Resources, New York Genome Center*
Development Track

How Do We Connect and Stay Connected to Donors in a Virtual World?

Tuesday, 3:00pm – 3:50pm

Join us for discussion in our second development session where we’ll cover engagement and stewardship as we put together new best practices.

**Discussion Moderator:** Christine Hughes, AIRI Development Co-Track Leader, Vice President, Advancement, Burke Neurological Institute

Finance Track

**Institutional Compliance**

Tuesday, 3:00pm – 3:50pm

Research institutions have the responsibility for ensuring institutional compliance with a wide range of federal regulations involving not only the protection of human research participants, but also a number of other grant and contract requirements. For many organizations, ensuring compliance with a growing number of government and industry regulations can be a drain on already strained resources. High scrutiny and policy changes only add to the challenges. This session will address significant compliance areas, including federal contract regulations, conflict of interest, foreign collaboration, effort/salary certification, and subaward monitoring. We will briefly explore how organizations can capitalize on internal and external resources to build and maintain an effective research compliance program.

**Panelists:** Ashley Deihr, CPA, CIA, CFE, Partner, Baker Tilly Virchow Krause, LLP; Adrienne Larmett, MBA, CRA, Senior Manager, Baker Tilly Virchow Krause, LLP; Margaret J. Fonner, Director, Office of Sponsored Research, Moffitt Cancer Center; **Facilitator:** Gina Holl, AIRI Finance Co-Track Leader, Director of Research Administration, Boyce Thompson Institute
Protecting an organization’s information assets remains a top priority for most successful data-driven organizations. The continuously evolving nature of the threat landscape makes this a dynamic and challenging goal for any institution, and the culture of independence that exists at most AIRI institutions only further complicates the adoption of an effective information security program. Join us in this open forum discussion to discuss Information Security topics with your colleagues from member AIRI institutes. Topics will include how to secure a remote workforce, foreign influence on the research enterprise, and the state-of-the-art in cyber security tools and processes. Please feel free to bring any relevant topics and concerns to this open forum style session.

**Facilitator:** Donald King, AIRI IT Track Co-Leader, Senior Director IT Infrastructure, Scripps Research

**Pilot Operations Track**

**How to Adhere to Success Metrics During Rapid Changes and Societal Shifts?**

Tuesday, 3:00pm – 3:50pm

How do you measure success? From proposal/grant submission targets and key recruitments, to endowment distribution and fundraising goals, how is your organization tracking and adjusting their strategic goals under the current environment? Join the conversation on key metrics and goals you are using to track your success for the upcoming years.

**Speaker:** Michael Annichine, AIRI Pilot Operations Co-Track Leader, Chief Executive Officer, Magee-Womens Research Institute and Foundation; **Facilitator:** Ana Cabrera, AIRI Pilot Operations Co-Track Leader, Director of Strategic Operations, Salk Institute for Biological Studies
Tuesday Virtual Cafe @4
Tuesday, 4:00pm – 4:30pm Eastern

Meet members of the AIRI Board and find out how to get involved. This is an informal virtual gathering. Upon joining, please turn off your video and audio for the initial introductions. You’ll be able to ask a question by choosing the chat feature or the “raise your hand” feature.

Wednesday General Session @1
1:00pm – 2:15pm Eastern

AIRI Annual Business
Wednesday, 1:00pm – 1:40pm

Come learn what AIRI is planning for the upcoming year and how you can become a part of it. AIRI provides many opportunities to get involved and stay connected with your peers throughout the year — come find out how. AIRI President, Tim Hassen, will lead this meeting. See next page for board and committee chairs.

AIRI Washington Office Report
Wednesday, 1:40pm – 2:15pm

The AIRI Washington Office will provide an update on AIRI’s federal advocacy activities over the past year and report on AIRI’s federal agenda, including the fiscal year 2021 appropriations process and increasing funding for research.

Panelists: Libby O’Hare, PhD; and Nicole Parker, PhD, both from Lewis-Burke Associates, LLC

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