<table>
<thead>
<tr>
<th>Section</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational History, University Council</td>
<td>Thomas Deutsch, MD</td>
</tr>
<tr>
<td>Introduction of New Staff Members</td>
<td>Kenneth Tuman, MD</td>
</tr>
<tr>
<td>Overview RUMC Mission, Vision &amp; Values</td>
<td>Michael Dandorph</td>
</tr>
<tr>
<td>Citizenship/ Professionalism</td>
<td>Omar Lateef, DO</td>
</tr>
<tr>
<td>Overview of Medical Staff Services</td>
<td>Sherald Leonard, MD</td>
</tr>
<tr>
<td>RUMC Rules &amp; Regulations of the Medical Staff Bylaws of the Medical Staff of RUMC</td>
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</tr>
<tr>
<td>Legal Affairs</td>
<td>Carl Bergetz, JD</td>
</tr>
<tr>
<td>Mentoring Programs</td>
<td>Giselle Sandi, PhD</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Brenda Weddington, MEd</td>
</tr>
<tr>
<td>Institution Research, Assessment and Accreditation</td>
<td>Rosemarie Suhayda, PhD, RN</td>
</tr>
<tr>
<td>Research Affairs</td>
<td>Thomas Champagne, MBA</td>
</tr>
<tr>
<td>Research Compliance / Research Integrity</td>
<td>Stephanie Guzik, MBA, RN, BSN</td>
</tr>
<tr>
<td>Philanthropy</td>
<td>Krista Giuffi</td>
</tr>
<tr>
<td></td>
<td>Sophia Worobec</td>
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</tbody>
</table>

**Faculty Orientation**  
Oct. 5 2017
# Faculty Orientation
## Oct. 5 2017

<table>
<thead>
<tr>
<th>Department</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simulation Lab</td>
<td>Mike Kremer, PhD</td>
<td>Co-Director, Simulation Lab</td>
</tr>
<tr>
<td>Faculty Affairs</td>
<td>Susanna Chubinskaya, PhD</td>
<td>Associate Provost, Faculty Affairs</td>
</tr>
</tbody>
</table>
NEW FACULTY ORIENTATION

October 5, 2017
Kenneth Tuman, MD
President, Medical Staff
Rush University Medical Center
Roles, Rules and Responsibilities of the Medical Staff

• Responsible for the quality of services provided
• Participation in processes that help define organizational goals
• Medical Staff Bylaws define relationships, rights and responsibilities
• Medical Staff Committees/Subcommittees are important functional units
• Medical Staff Bi-Annual Meetings (May & November)
2015: Physicians: 924; Affiliated Scientists: 49; APPs: 268;

2016: Physicians: 971; Affiliated Scientists: 54; APPs: 285

2017: Physicians: 1011; Affiliated Scientists: 52; APPs: 300
Medical Staff Committees

- Medical Executive Committee
- Quality Committee
- Peer Review Committee
- Professional Assistance Committee
- Credentials Committee
- Bylaws Committee
- Nominating Committee
Kenneth Tuman, MD – President
Edward Ward, MD – President-Elect
Dino Rumoro, DO,– Past-President
Jonathan Myers, MD – Treasurer
Yanina Purim-Shem-Tov, MD, MS – Secretary
• SURGICAL CHAIRPERSONS
  – Pete Batra, MD
  – Joshua Jacobs, MD
  – Vijaya Reddy, MD

• MEDICAL CHAIRPERSONS
  – William Schwer, MD
  – Mark Pollack, MD
  – Jochen Reiser, MD, PhD

• AT-LARGE MEMBERS
  – Paul Casey, MD
  – Ryan Braun, MD
  – Kerstin Stenson, MD
  – Steven Gitelis, MD
  – Pincas Bitterman, MD
  – Suparna Dutta, MD
  – Jeffrey Snell, MD
  – Michael Hanak, MD
Medical Staff Quality Committee

- Edward Hollinger, MD – Chair
- Steve Barnes, MD (Anesthesiology)
- Robert March, MD; Andrew Arndt, MD (Cardiovascular Thoracic Surgery)
- Summer Dewdney, MD (Gynecologic Oncology)
- Aidnag Diaz, MD (Radiation Oncology)
- Lorenzo Munoz, MD (Neurological Surgery)
- Jonathan Cheponis, MD (Neurology)
- Steven Gitelis, MD (Orthopedics)
- Robert Shulman, MD (Psychiatry)
- Anthony Zelazny, MD; C. Turba MD (Radiology)
- Haimanot Wasse, MD (Internal Medicine)

- Ramkrishna Mehendale, MD, PhD (Maternal-Fetal Medicine)
- David Cimbaluk, MD (Pathology)
- Jean Silvestri, MD (Pediatrics)
- Ravi Kasi, MD (Physical Medicine/Rehabilitation)
- Christine Tragos, MD (Plastic Surgery)
- Shahid Ekbal, MD (Urology)
- Peter Revenaugh, MD (Otorhinolaryngology)
- Philip Omotoshu, MD; Jonathon Myers MD (Surgery)
- Michael Hanak MD (Family Medicine)
Credentials Committee

- Edward Ward, MD—Chair
- Edward Hollinger, MD, PhD
- Margaret McLaughlin, MD
- Pete Batra, MD
- Barbara Soltes, MD
- Sharon Byrd, MD
- Srikumar Pillai, MD
- Steve Barnes, MD
- Yanina Purim-Shem-Tov, MD
- Sherald Leonard, MD
Edward Ward, MD – Chair
Michael Hanak, MD
Raymond Narth, MD
Paul Casey, MD
Ross Abrams, MD
Lorenzo Munoz, MD
Vijaya Reddy, MD
Kenneth Tuman, MD
Nominating Committee

- Christopher O’Connor, MD - Chair
- Robert DeCresce, MD
- Yanina Purim-Shem-Tov, MD
- Beverly Sha, MD
- Andrea Madrigano, MD
- Linda Gruenberg, MD
- Edward Hollinger, MD
• Gail Basch, MD - Chair
• Deborah A. Hall, MD
• Joseph Hennessy, MD
• Kerstin Stenson, MD
• Amanda Ellis-Pelletier, DO
• Omar Lateef, DO
• Gary Cohen – EAP
• Bill Heffernan – EAP
• Jim Korenich - EAP
Peer Review Committee

- Kenneth Tuman, MD – Chair
- Edward Hollinger, MD, PhD
- Martin Hertl, MD
- Edward Ward, MD
- Dino Rumoro, DO
- Brian Stein, MD
- Omar Lateef, DO
Peer Review Processes

• Uniform policy for all MS members and practitioners with clinical privileges
• Non-biased activity performed by the medical staff (MS)
• Professional performance events (clinical outcomes and/or behavioral issues)
• Peer Review Oversight Committee determines if case merits peer review
• Departmental peer review is almost always the initial step
  - Department Chairperson holds key responsibility in process
• Most concerns handled via collaborative intervention of Dept. Chairperson and/or the Medical Staff President
• Some concerns warrant initiation of formal corrective action
• MS Bylaws/ Rules & Regs define the required procedures for corrective action
• All processes based on principles of respect, fairness and continuous improvement
Rush University Medical Center and Rush System for Health

Michael Dandorph

New Faculty Orientation
Rush has been a part of the Chicago landscape for more than 170 years. Rush includes:

- **Rush University Medical Center**
- **Rush University** – a dedicated health sciences university with four distinct colleges
  - College of Nursing
  - College of Health Sciences
  - Rush Medical College
  - The Graduate College
- **Rush University Medical Group** with over 500 employed physicians
- **Rush Oak Park Hospital**
- **Rush Copley Medical Center**
- **Rush Health**, a clinically integrated network of physicians and hospitals
Mission:
The mission of RUSH is to improve the health of the individuals and diverse communities we serve through the integration of outstanding patient care, education, research, and community partnerships.

Vision:
RUSH will be the leading academic health system in the region and nationally recognized for transforming health care.

Values:
• Innovation
• Collaboration
• Accountability
• Respect
• Excellence
Governance Structure

Rush System for Health (System Parent)

Sole Corporate Member

Rush University Medical Center

Rush - Copley Medical Center

Future Partners

Rush Oak Park Hospital

Hospital Members
RUMC, ROPH, RCMC and Riverside

Rush Health

Physician Members

Back to Top
People
Create an innovative environment of continuous learning and personal growth to develop the healthcare workforce of the future

Reach
Extend and expand the reach of Rush through growth, partnership and innovation

Programs
Deliver an integrated, patient centered approach to care and discovery that sets a new standard for quality and value

Community
Become a catalyst for community health and vitality
• Opened April 4, 2016
• 10,000 square feet
• Five primary care physicians
• Two ObGyns
• One dermatologist
• Walk-in care
• Select specialties
Concept:
• Ambulatory destination center to provide convenient access to existing and new patients

Rush Program:
• Specialties will include:
  • Primary Care
  • Cardiology
  • Dermatology
  • Endocrinology
  • Obstetrics and Gynecology
  • Otolaryngology

Site Specifics:
• 15-story mixed used development
• Rush will occupy 3 floors
• CON approved in September 2016
• Projected occupancy in FY2019
Concept:
• Bring advanced orthopaedic care closer to Rush patients
• Establish a destination orthopaedic institute

Rush Program:
• Joint venture agreement with Midwest Orthopaedics at Rush
• Ambulatory surgery center
• Rehabilitation and recovery services
• Outpatient medical services

Site Specifics:
• 3.5 acre site
• Site can accommodate up to 98,000 sf of space developed
• CON approved in October 2016
• Groundbreaking was April 10, 2017
• Projected occupancy in FY2019
Concept:
- Consolidate ambulatory services to one building, improving patient experience through the campus transformation
- Unified check-in and registration
- Adoption of innovative wayfinding technology
- Consistent, high quality experience across physician practices

Site Specifics:
- Approximately 500,000 square feet
- Projected to open in FY2021
Regional Expansion
Citizenship/Professionalism

Omar Lateef, D.O.
Vice President & Chief Medical Officer
Professionalism

Excellence

STARS and PARS

Professional interactions with patients

Leadership

Patient Safety: Safe Care Every Patient, Every Employee, Every Time

Hand Hygiene

Just Culture

Teamwork: How well staff work together influences ‘likelihood to recommend hospital’

Handoffs

Calling / Responding to a Consult

Resources

Physician advocacy
MEDICAL STAFF SERVICES

Sherald Leonard, M.D.
October 2017
New Physician Orientation
– What is FPPE?
  1. New applicant
  2. New privilege
  3. Concern

– What is OPPE?
  • Semi-annual Departmental Evaluation
Credentialing

- Notify MSO when change of address/phone, etc.
- Attendance at Annual/Bi-annual Meetings – May/November of each year
MANDATES

• Dues:
  – Medical Staff Dues are due every two years on the reappointment cycle.
    • Medical Specialties – Odd years
    • Surgical Specialties – Even years

• Leap education is due ANNUALLY for all providers by 6/30
  – Additional modules may include
    • Pain Management / Restraints
    • Sedation
    • Cytotoxic medications

• Conflict of Interest

• Flu
Need answers ???.....contact Medical Staff

Questions???
Office of Legal Affairs &
Office of Risk and Claims Management

2017

Carl Bergetz, General Counsel & SVP
CONTACT INFORMATION

• Office of Legal Affairs
  – 1700 W. Van Buren Suite 301
  – 942-6886

• Office of Risk Management
  – Kidston 3\textsuperscript{rd} Floor
  – 942-7828
  – On-Call at 85-7101
WHY CONTACT?

- Contract Review (OPP 346)
  - All contracts/arrangements require legal review
  - If unrelated to research, the lead responsible person should send the arrangement to contractreview@rush.edu with the pertinent information (timing, special terms, business priorities/concerns).
  - With limited exceptions, the attorney reviewer must sign a Contract Approval Form before the agreement is executed.
  - Once signatures are obtained, the lead responsible person must send an executed copy to attorney review or contractreview@rush.edu.
Common Contracts

• Consulting (must comply with Rush’s Conflict of Interest Policy OP-0359)

• Clinical Affiliation Agreements
  • Questions regarding distance learning compliance should be directed to the Rush University Regulatory Coordinator, LaTonya Gunter LaTonya_Gunter@rush.edu.

• Research (see next slide)
• Research Agreements
  – Clinical Trial Agreements
  – Confidentiality Agreements
  – Material Transfer Agreements
  – Data Use Agreements
  – Novel Research Agreements

• Research Contract Process
  – All research contracts submitted to Office of Research Affairs for review and processing.
  – Research Affairs will collaborate with OLA and seek assistance when necessary.
Intellectual Property

• All intellectual property disclosures must be made to Jay Vijayan (Shrijay_Vijayan@rush.edu) in the Technology Transfer Office.

• The Technology Transfer Office reviews all disclosures and makes recommendations for filing of intellectual property.

• Questions regarding intellectual property can be directed to Heather Kartsounes (Heather_A_Kartsounes@rush.edu) or Jay Vijayan.
Office of Risk and Claims Management

- Incident Management
- Risk Management
- Insurance Coverage Issues
- Claims Management
Risk and Incident Management

- Difficult patient/family situations
- Patient Consents
- End of life issues
- Guardianships and Surrogate Decisionmaking Questions
- Data analysis of incidents and adverse events and reporting for process improvement
Claims Management & Insurance

- Subpoenas
- Summons & Complaints
- Government Inquiries
- Calls from Lawyers
- Insurance Coverage Questions
- Claims Verification
Investing in the Future: Mentoring Programs at Rush University

Giselle Sandí, PhD
Director
Mentoring Programs
Rush University

October 5, 2017
www.rushu.rush.edu/mentoringprogram
Four Mentoring Programs

- Research
- Educational
- Postdoctoral
- Women

Close to 300 mentees and mentors combined
Board and Steering Committee who oversee the RRMP program

Mentees and mentors are from College of Medicine, College of Nursing, College of Health Sciences, and the Graduate College.
Research Mentoring (RRMP)

- Program pairs junior investigators with experienced and dedicated mentors (80 volunteered mentors as of today)
- Two translational research tracks:
  - Clinical (outcomes, behavioral interventions, decision-making, communication, and patient safety)
  - Laboratory/basic science
RRMP: Stats and Outcomes

MENTEES
- 9% Rush Medical College
- 9% College of Health Sciences
- 9% College of Nursing
- 82% Other

GENDER
- 37% Women
- 63% Men

RESEARCH TRACKS
- 72% Clinical
- 24% Laboratory-based
- 5% Other

MENTEE RANKINGS
- 75% Assistant Professors
- 13% Associate Professors
- 7% Instructors
- 5% Post-doc Fellows
Over the past ten years, mentees in collaboration with mentors have been awarded a total of $83 millions in grants.

<table>
<thead>
<tr>
<th>Total funding</th>
<th>$83,069,437</th>
</tr>
</thead>
<tbody>
<tr>
<td>As PI</td>
<td>$32,927,219</td>
</tr>
<tr>
<td>As Co-PI</td>
<td>$50,142,218</td>
</tr>
<tr>
<td>Total number of grants awarded</td>
<td>591</td>
</tr>
<tr>
<td>Total number of NIH grants (out of total)</td>
<td>222</td>
</tr>
<tr>
<td>Total number of other grants (out of total)</td>
<td>369</td>
</tr>
<tr>
<td>Total number of publications</td>
<td>882</td>
</tr>
<tr>
<td>Total number of presentations</td>
<td>652</td>
</tr>
<tr>
<td>Total number of posters</td>
<td>476</td>
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</tbody>
</table>
Educational Mentoring

- Program supports educators and educational scholars
- Two tracks:
  - an education track **basic level focused on teaching and learning**;
  - an educational **scholar’s track level** focused on conducting educational research, publishing, and acquiring funding
# Teach the Teacher: Teaching Excellence Course

## Six Core Education Sessions

<table>
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<tr>
<th>Sessions</th>
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<tbody>
<tr>
<td>Five Simulation in Health Sciences Sessions</td>
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<tr>
<td>Five Online Teaching Sessions</td>
</tr>
<tr>
<td>Four Active Learning Strategies</td>
</tr>
</tbody>
</table>
The RSP was founded in 2013 in order to facilitate community building for postdocs at Rush. Program provides:

- NPA membership
- Career development
- Travel funding for attend career development or professional conferences
- Mentorship with junior or senior faculty
Rush Women Mentoring Program

- Founded in 2014
- Program provides:
  - Career development seminars, workshops, and social events organized monthly at Rush.
  - Funding for attend career development or professional conferences
  - Mentorship with senior faculty based on specific career goals
## Program Resources

<table>
<thead>
<tr>
<th>For all the programs</th>
<th>Professional grant writing coaching and manuscript editing</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Statistical analysis</td>
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<td></td>
<td>Communication Skills Workshops</td>
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<tr>
<td></td>
<td>Graphics consulting</td>
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<tr>
<td></td>
<td>Monthly track meetings (clinical, lab, educational)</td>
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<tr>
<td></td>
<td>Weekly mentee writing groups</td>
</tr>
<tr>
<td></td>
<td>Regular workshops and seminars on a variety of research-related and grant-writing topics</td>
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<tr>
<td></td>
<td>Research Symposium were travel awards are given to best papers</td>
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</tbody>
</table>
The Cohn family foundation provides the RRMP with grant support, which is distributed equally to five mentees annually.
How we measure success

- Annual Surveys
- Goals accomplished (short and long term)
- Grants and Papers by mentees and office
- Number of applications to enter the program
### Research mentoring
- Program is open to all faculty members at RUMC and Stroger.
- Must have 20% protected time from their department.
- Mentees must set and achieve annual research goals.
- The RRMP mentee term limit is 5 years, after which time mentees are expected to become junior mentors.

### Educational mentoring
- The program is open to all faculty members at RUMC and Stroger.
- Mentees must set and achieve annual research goals.
- The REMP mentee term limit is 5 years, after which time mentees are expected to become junior mentors.

### Application process
- RRMP: Detailed instructions found in website and also in FAQs
- REMP: Contact us or Dr. Elizabeth Baker, the lead mentor of this group
Giselle Sandi, PhD
Director
Kidston Building|630 S. Hermitage Ave., Suite 606|Chicago, IL 60612
T: 312-563-3146|F: 312-563-3141|E: Giselle_Sandi@rush.edu

Jeannette Hui
Support Associate
Kidston Building|630 S. Hermitage Ave., Suite 606|Chicago, IL 60612
T: 312-563-3130|F: 312-563-3141|E: Jeannette_Hui@rush.edu
Research Matters!
Transforming the Environment for Research Excellence

The Office of Research Affairs
Thomas J. Champagne, Jr. MBA, CM, C.P.M.
Fall 2017
Priorities: People, Process, Outcomes

Our transformation energy continues to be focused on 3 key variables: people, process, outcomes.

1. People
   - Clarifying roles and job duties – eliminating redundancies
   - Validating org charts and over 36 position descriptions
   - Improving the value of staff investments/overhead

2. Process
   - Drafting/vetting over 40 operational policies, procedures, SOPs
   - Identifying critical process flows and related training needs
   - Reducing time, effort, cost to complete core duties

3. Outcomes
   - Consolidating key functions within the ORA
   - Promoting data-driven decisions and service-focused operations
   - Establishing a platform for growth, increased research capacity, responsiveness & awareness

A Path Forward
The ORA is poised to coordinate more complex research functions with an emphasis on value to the research community, responsiveness to RUMC needs, and operational efficiency.

Cataloguing our Tools for Growth / Transformation:

Volume I: ORA Summary Policies
Volume II: Review of Office Organization and Position Descriptions
Volume III: Framework for Comprehensive Training and Education Programs
Volume IV: Establishing a Comprehensive Compliance and Risk Mitigation Program
We are structured in a manner that core research administration functions align to specific responsibilities, and clarify job duties for ORA.

Divisions encapsulate clear functions, with clear leaders, duties, and organizational structures; relationships across the research enterprise are deepening.
Leaders have been distinguished within each Division. Per-person coaching, communication, & engagement drives accountability & fosters succession.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Qualifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer Garcia; B.S.</td>
<td>Director, Sponsored Programs Administration</td>
</tr>
<tr>
<td>Stephanie C. Guzik; BSN, RN, MBA</td>
<td>Director, Research Compliance &amp; Integrity Officer*</td>
</tr>
<tr>
<td>Allecia A. Harley; MPH</td>
<td>Associate Vice President, Clinical Research Administration</td>
</tr>
<tr>
<td>John H. McClatchy; B.S., BBA</td>
<td>Senior Director, Medical Affairs Finance*</td>
</tr>
<tr>
<td>Jeffery P. Oswald; DVM</td>
<td>Senior Director, Animal Care &amp; Use</td>
</tr>
<tr>
<td>Karl L. Oder, M.S., MSRA</td>
<td>Chief IS Architect, Research Information Systems*</td>
</tr>
<tr>
<td>Jay Vijayan; Ph.D., MBA</td>
<td>Associate Director, Innovation &amp; Technology Transfer</td>
</tr>
<tr>
<td>Mary Jane Welch; DNP, APRN, BC, CIP</td>
<td>Associate Vice President, Research Regulatory Operations</td>
</tr>
</tbody>
</table>

*not a direct report to ORA
The ORA will continue evolving toward a “best-in-class” service unit, supporting Rush’s strategic vision for Research.

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<tr>
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</thead>
<tbody>
<tr>
<td>Leadership Capacity</td>
<td>Delegated Authority</td>
<td>Scope &amp; Quality of Work</td>
<td>Today vs Tomorrow</td>
<td>iCARE Values</td>
</tr>
<tr>
<td>Organizational Charts &amp; Linkages to Institution</td>
<td>Policy &amp; Procedure Implementation</td>
<td>Link Work to Research Strategic Plan</td>
<td>Exposure &amp; Awareness</td>
<td>Freedom for Personal Expression</td>
</tr>
<tr>
<td>Filling Roles &amp; Leveling</td>
<td>Methods &amp; Approaches</td>
<td>Fair &amp; Equitable Work Divisions</td>
<td>Marketing &amp; Branding</td>
<td>Accountability &amp; Ownership</td>
</tr>
<tr>
<td>Salary Administration &amp; Incentivization</td>
<td>Data Measurement</td>
<td>Data Outcomes &amp; Adjustments</td>
<td>Customer Service Surveys</td>
<td>Peer Acknowledgement</td>
</tr>
<tr>
<td>Training &amp; Education/Incentives</td>
<td>Communication Plans</td>
<td>Better Tomorrow Than We Are Today</td>
<td>National Landscape &amp; Institutional Capacity</td>
<td>Patient Outcomes &amp; Compassionate Care</td>
</tr>
</tbody>
</table>
Allegiance to the Research Strategic Plan, plus:

- More **efficient and effective** research / departmental staff **onboarding**
- Potential administrative **grant writing assistance/resources**
- **“Shared Services” & shared staffing** models to facilitate / support D-Admins
- Concerted **look into Cores** & core services (e.g., Bioinformatics). Stronger **coordination of opportunities** between Chicagoland institutions
- **Enhanced technologies** supporting Research Admin, including LINK, portal improvements, “Profiles”, a CTMS, and shared data-dashboards w/real-time grant spending status
- Increased **emphasis on Innovation, Tech Transfer, and Licensing**
- Continuous and proactive **research compliance monitoring** plans
- Targeted, JIT **training & education** for requesting PIs, Co-Is, and research staff
Meet the Lab! those Who Really Do the Work...
Thank you!

Tom Champagne - x3-2742
Cell 24/7: 312-927-8703

Tom_Champagne@rush.edu
Introduction

The Research Regulatory Operations (RRO) division of the Office of Research Affairs at Rush provides consultation services to facilitate your research activities. Any individual or team who is or will be part of research at Rush should feel free to contact us.

Utilizing the consultation services will:

- Facilitate your research at Rush
- Increase your understanding of regulations pertaining to research
- Minimize harm, pain, or distress
- Develop collaborative relationships with research staff and research regulatory committees
- Increase the efficiency of regulatory review by our committees
- Increase understanding of, and expertise with the Rush Research Portal

Our Services

Our staff is available for email, phone, or in-person consultations. If you would like to schedule a consultation, please call:

Elanda Shannon
Administrative Assistant
Elanda_T_Shannon@rush.edu
312-563-2721

The RRO consultation services may cover the following example areas:

- Questions related to ethical concerns
- Recommendations on the most effective use of the regulations
- Consultation related to research that may not be covered under the federal definition of human subjects research (policy IRB-RA-118)
- Questions about the Institutional Biosafety Committee (IBC) and the use of recombinant or synthetic DNA
- Questions about research that includes ionizing radiation
- Questions about inventions and intellectual property
- Consent form editing or review
- Ways to minimize harm during your study
- Expectations about the review process (e.g., type and length of review)
- Advice about HIPAA regulations
- Requesting a consent waiver or alteration of consent
- Regulations for studies involving drugs or devices that will be used on humans or animals
- Reporting adverse events and unanticipated problems

Referrals

Please remember that if you have any specific questions about any of the following areas, you can get in touch with the following people:

Animal Care and Use / 312-942-6576
Office of Legal Affairs / 312-942-5475
Conflict of Interest / 312-942-1296
Coverage Analysis / 312-942-3027
Grants / 312-942-1991
Contracts / 312-942-9934
Innovation & Technology Transfer / 312-563-2732
RRO Staff and Contacts

John Cobb, BA, CIP
IRB Manager
John_T_Cobb@rush.edu
312-942-6855

Jonathan C. Young, PHD, CIP, CCRP
Senior IRB Consultant
Jonathan_Young@rush.edu
312-942-3571

Gia Hayes
IRB Consultant
Gia_Hayes@rush.edu
312-942-6693

Reva Wymbs-Ball
IRB Consultant
Reva_T_Wymbs@rush.edu
312-942-3606

Denise Voskuil-Marre, BS
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312-942-3049

Ed Blazek, PHD
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Ed_R_Blazek@rush.edu
312-942-5222

Anthony Davis, BSC, LATG
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312-942-6576

Danita Schaal, CVT, LATG
IACUC Coordinator
Comparative Research Center
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312-563-3374

Claudia Gatch
Administrative Assistant, Innovation & Technology
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312-563-2732

Antonio DeMarco, BS
Rush Research Portal Specialist
Antonio_S_DeMarco@rush.edu
312-942-5097

Rush University Medical Center
Office of Research Affairs
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<tbody>
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**Clinical Research Administration**

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**Clinical Research Finance**

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**Industry-Sponsored Agreements**

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**Comparative Research Center**

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**Innovation & Technology Transfer**

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**Research Administration Technologies**

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**Sponsored Programs Administration**

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A. Sponsored Programs Administration:

- 485 # of proposals/letters of intent submitted in FY '17
- 439 # of research awards made to Rush in FY ‘17 – all sources
- >$102M dollar value of those awards
- 22.4% increase over the same period a year ago

- >$80M dollar value of Federal awards to Rush in FY ‘17
- 27.5% increase over the same period a year ago

B. Innovation, Intellectual Property & Tech Transfer:

- >220 # of invention disclosures filed since 2010
- >195 # of patent applications since 2010
- 50 # of patents issued since 2010
- 35 # of licenses & options executed since 2010,
- >$65M dollar value of related license income to Rush

C. Institutional Animal Care & Use:

- 3,000 # in the current animal census at Rush
- 96% census represented by rodents
- >23,000 g.s.f. of dedicated care, husbandry & procedure space in Cohn
- 13 # of dedicated CRC staff
- 200 # of approved IACUC protocols at Rush
- 11 # of currently-serving IACUC members
- 0% change in FY ’18 per diem rates
- $1.8M dollar value of FY ’17 recharges recovered
D. Clinical Research Administration:

- 24% increase in industry sponsored charges invoiced
- 22% increase in industry sponsored payments to Rush
- 141% increase in new agreements executed in FY ‘17
- 14% decrease in new coverage analyses submitted in FY ‘17
- 120% increase in new Cancer CT enrollments in FY ‘17
- 409 # of instances Research Nurses & Coordinators trained or supported enterprise-wide

E. Research Regulatory Operations:

- >1,700 # of active IRB protocols at Rush
- >35 # of currently-serving IRB members
- 8 # of regulatory oversight committees at Rush including planned Biorepository and potential Stem Cell committees
- 6 # of research cores, including a Biological Safety Program
- 201 # of PI consults since Mar ‘16 inception of “Consultation Services” program

F. Research Administration Technologies:

- 6 # of key technologies supporting Research - including LINK, a research portal, CTMS, Granite, and research website URLs
Research Compliance

Faculty Orientation
Office of Research Compliance

Reports to the Vice Provost for Research

Contacts:

Stephanie C. Guzik, Director x21296
Mary Keller, Auditor/Educator x24485
Colleen Sowinski, Auditor/Educator x28314
Poorna Nagarajan, Auditor/Educator x28613

Location:

Jelke Building Suite 600
Role in Compliance

Your Responsibilities:

Report any concerns, suspected issues, or incidents involving Compliance, Privacy, or Security by:

- **Speaking to your supervisor.** If you are not comfortable with this, or the issue is not resolved, then
- **Contact the Compliance Department at 312-942-5303, or**
- **Report your concern via the Rush Hotline at 877-787-4009 (available 24 hour/7 day a week).** Please provide enough detail so that the issue may be properly investigated.

For additional information, visit the Compliance intranet site at: [http://iris.rush.edu/compliance/](http://iris.rush.edu/compliance/)

Research Compliance

Basics

Built on the requirements from the US Department of Health and Human Services (DHHS)/Office of Inspector General (OIG)
Rush’s Compliance program includes:

- Written policies and procedures
- Organizational oversight of the compliance program
- Education and training
- Auditing and monitoring
- Anonymous reporting process
- Investigatory, corrective action and disciplinary processes
- Response and prevention efforts
Research Compliance

Specifics

Rush makes every effort to comply with applicable laws and regulations. Two Offices- The Institutional Review Board (IRB) and Office of Research Compliance (ORC) monitor research activities and investigate, improve and report on any possible issues found

- Research Misconduct
- Scientific Integrity
- Research Non-Compliance
- Research Training and Education
- Conflicts of Interest in Research
- Education and Quality Improvement Auditing/Monitoring
- Policy and Procedures in Research
Research COI

Purpose

• Prevention of bias in decision making related to:
  • Human subjects research
  • Medical education
• Ethical Conduct in Research and Subject Care
• Identify Financial and Personal relationships with Industry

Responsibility

• Manage, Reduce or Eliminate COI’s
Research COI

COI Defined:

A potential Conflict of Interest (COI) may exist if an individual’s outside interests (especially financial) may affect, or perceive to affect, his/her research, teaching, or administrative activities at RUMC.

Significant Financial Interest (SFI) Defined:

SFI—Anything of monetary value, including salary or other payments for services, equity or other ownership interests, and intellectual property rights (42 CFR 50.603)
Examples of Relationships that can lead to COI

- Serving as a director/decision maker for a sponsor
- Receiving equity interest in a company
- Ownership in a sponsor
- Receiving royalties or licensing fees
- Compensation for services as a consultant
- Compensation for lecture or honoraria for speaking

What is **Usually** not a COI

- A fair market wage for the time, effort and skill required to conduct the study
- Sponsor coverage of the actual cost of the study
- Income from non-profit organizations for lectures
- Income from service on federal and non-profit advisory or review panels
- Publicly traded diversified mutual funds
Disclosing SFI’s at RUMC - Annual Survey

1. Login to the Rush Research Portal (RRP): https://www.rush.edu/researchportal

2. Click on My Home, located in the upper right hand corner next to your name:

3. Along the left, under My Roles, click on Conflict of Interest Disclosure:
Conflict of Interest

1.0 Do any of the research personnel participating in the study listed below or anyone else, including immediate family (spouse/significant other/dependent children) have a financial and/or intellectual property interest in the sponsor or products used with this study?

Financial Interests include but are not limited to income (consulting fees, honoraria, etc.), equity (stock, stock options, etc.) exceeding $5,000 or an ownership interest for a single enterprise, management positions, and intellectual property interests. Please see Operational Policy OP 0359 for a more comprehensive definition.

<table>
<thead>
<tr>
<th>COI Required Field</th>
<th>Study Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes ☑ No</td>
<td>John Doe</td>
</tr>
</tbody>
</table>

2.0 Anyone who answers "Yes" to question 1.0 above, must complete the "Statement of Financial Interests – RESEARCH" form below and upload the completed document within the portal as soon as possible to avoid a delay in IRB review. To upload the document: locate an activity on the IRB summary workspace called "Upload COI Disclosure". This will send your disclosure electronically in a secure space in the portal and a notification to the Office of Research Compliance for processing. Should you have any questions, contact Office of Research Compliance at:

Office of Research Compliance
701 South Wood Street, Suite 140
Chicago, IL 60612
Attn: Conflicts Officer
312-942-1256

CC-RC-0008 External Relationships and Financial Conflicts of Interest in Research.pdf
COI Policy - OP-0359
COI Survey Instructions
ROPV COI POLICY
ROPV Vendor Guidelines
Statement of Financial Interests – RESEARCH
Vendor Guidelines

Back to Top
Scientific Misconduct

Definition:

Fabrication, falsification, or plagiarism in proposing, performing, or reviewing research, or in reporting research results.

1) **Fabrication** is making up data or results and recording or reporting them.

2) **Falsification** is manipulating research materials, equipment, or processes, or changing or omitting data or results such that the research is not accurately represented in the research record.

3) **Plagiarism** is the appropriation of another person's ideas, processes, results, or words without giving appropriate credit.

PHS Regulation 42 CFR 93

Research Misconduct: Policy for Review and Reporting Research Misconduct
Questions?

Mary-312-942-4485
Colleen-312-942-8314
Poorna-312-942-8613
Stephanie-312-942-1296
Corporate Compliance 312-942-5303
Are you a principal investigator, research coordinator, academic advisor, or mentor? Roles such as these place you in a unique position to cultivate exceptional research practices among the next generation of researchers.

1. **BE AVAILABLE & APPROACHABLE**
   - Your team wants to learn from YOU!

2. **REVIEW RAW DATA**
   - You are responsible for the integrity of your team’s data.

3. **COMMUNICATE EXPECTATIONS**
   - Prevent misunderstandings by making sure everyone is on the same page.

4. **PROVIDE TRAINING and GUIDANCE**
   - Avoid making assumptions about anyone’s skills or knowledge.

5. **KNOW YOUR RESEARCH INTEGRITY OFFICER**
   - Be prepared in case you ever suspect research misconduct.

Find out more:
- ori.hhs.gov
- @HHS_ORI
- #ORIedu
Mission: The Office of Philanthropy advances Rush’s mission to improve health of the diverse communities we serve by connecting grateful patients, alumni, staff, faculty, organizations and friends with opportunities to fulfill their philanthropic goals.

- Coordinates all institutional efforts to raise philanthropic funds
- Provides staff support for the Board of Trustees and all of its committees, including the Board of Overseers
- Under the direction of Diane McKeever, sr. vice president of philanthropy, serves as chief development officer and secretary of the Board of Trustees; reports to and receives direction from Dr. Goodman
- 927 faculty members raised nearly $17,000,000 in the last campaign (2004-2012)
- Faculty members also contributed $521,600 to support the new Rush Center for Clinical Skills and Simulation

Office of Philanthropy Organization (Donor source & function)
- Annual Giving
- Major/Planned Giving
- Alumni Relations
- Special Events
- Auxiliary Groups
- Corporate/Foundation Relations
- Donor and Alumni Communications
- Advancement Services
- Donor Stewardship
- Principal Gifts

University and Medical Center Fundraising Events/Initiatives
- Rush University Golf Outing (Fall)
- Rush Associates Board Casino Night (Spring)
- Medical Staff fundraising for medical student scholarship support

Alumni Relations Functions
- Maintenance of alumni address records (including email)
- Management for the nursing and medical alumni associations and support for program-specific alumni groups in the College of Health Sciences and Graduate College
- Alumni events, including reunions, educational events, etc.
- Alumni communications

Alumni Population

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Health Sciences</td>
<td>3,576</td>
</tr>
<tr>
<td>Graduate College</td>
<td>818</td>
</tr>
<tr>
<td>Nursing Alumni*</td>
<td>9,508</td>
</tr>
<tr>
<td>Medical College</td>
<td>5,062</td>
</tr>
<tr>
<td>Graduate Medical Education</td>
<td>6,495</td>
</tr>
<tr>
<td><strong>Total Alumni</strong></td>
<td>25,459</td>
</tr>
</tbody>
</table>

* Nursing alumni comprises graduates of Rush and three predecessor schools
** Includes alumni with dual degrees

Contact Us

Office of Philanthropy
(312) 942-6830

Alumni Relations
(312) 563-9058

Corporate and Foundation Relations
(312) 942-4611
Frequently Asked Questions

How to know how much money does my department fund have?

Access the Link Home Page via the Rush Intranet, under the “Purchase Requesters and Approvers” section in the middle column, you can:

Do basic lookups on Activities (aka Funds) via the “Access Grants Account Lookup” link.
- There are filters for P.I. (Activity director), Activity number, Activity name/description, etc.

Fund Accounting (contact: Jane Winger) can add to Link the name of any individual who needs to pull detailed transaction reports on a given Activity.

How can I get a unique giving link for online donations to my department’s philanthropic fund?

Contact the Annual Giving Team to discuss fundraising strategies and to create a secure giving link: Jessica Sharrow, Director of Annual Giving: (312) 563-9062
Corporate and Foundation Relations

Seeking Grant Support at Rush
There are two distinct offices at Rush that coordinate grant proposals. All grants must be submitted in conjunction with the appropriate office. These are:

- **Office of Philanthropy, Corporate and Foundation Relations** coordinates all proposals to corporate and foundation giving programs
- **Office of Research Affairs** coordinates all government grant applications and proposals to professional associations

If you are unsure which office is coordinating a particular application, just ask! Members of either team will be happy to direct you to the right place.

Office of Philanthropy, Corporate and Foundation Relations
Corporations (through corporate foundations or corporate giving programs) and private foundations support many types of research, projects, and programs at Rush. Part of the Office of Philanthropy, Corporate and Foundation Relations serves as the coordinating body for these interactions. We respond to donor needs promptly and thoroughly, maintain contact with the donor and encourage ongoing interaction, and seek opportunities to facilitate a strong, long-term connection between the donor and Rush. In brief, we work to put the best institutional foot forward at all times.

How We Can Help
Pursuing private funding is a collaborative process between you — the faculty or staff member — and our staff. We will work with you to:

*Identify potential grantmakers*
We are happy to conduct prospect research for you using our Foundation Directory Online account and other resources. If you are in need of some prospect research, please reach out to someone on our team directly to make a request. Once you contact us, we will ask that you provide ample information on your project or program, so that we have a good idea of what we should be looking for. Please be aware that we receive many prospect research requests and only one staff member who dedicates time to corporate and foundation prospect research, so it may take anywhere from two weeks to up to a month for us to get you results, and often times, depending on your project/program, there simply won’t be any opportunities out there.

*Develop high-quality proposals*
You are the content expert, so we ask that you draft the proposal and budget. We review the proposal and verify that it fits the grantmaker’s guidelines and makes a compelling case for support. We suggest edits and, if necessary, ensure that it will be understood by a lay audience. Finally, we package and submit the final proposal, including any supplemental materials (such as Rush’s proof of tax exempt status, audited financial statements, institutional letters of support, etc. as required) to the grantmaker.

If your proposal is a research proposal, we now ask that you submit your proposal and other required materials to the Rush Research Portal (RRP). All communication and review will occur through the portal as a means to accurately track grant submissions internally. Either the PI or one of our staff members will then submit the proposal and required materials directly to the grantmaker. If you do not have an RRP account yet, you will need to attend a training session which you can schedule by contacting Antonio Demarco at antonio_s_demarco@rush.edu.
Responsibly manage active grants
We facilitate creation of a specific purpose activity for your grant and notify you of report deadlines. While you are responsible for preparing progress reports as required and tracking expenditures in accordance with the grant agreement, we work with you to finalize and submit these reports. We also promptly acknowledge receipt of funds in accordance with Internal Revenue Service requirements.

Cultivate strong, long-term relationships with funders and potential funders
You are responsible for fulfilling project requirements, using grant funds as proposed, and notifying us if substantial changes are required to complete the work. We are responsible for coordinating efforts to express Rush’s appreciation (such as phone calls and thank-you letters), obtaining feedback from grantmakers about successful (and unsuccessful) proposal submissions, apprising donors of meaningful developments relating to their grant or the institution, and seeking approval to alter project scope or timing, if needed.

We ask that you contact us before initiating contact with staff at potential sponsoring organizations so that we may ensure that there are no conflicts with existing relationships or active grants.

Please note that if you are planning an event for which you would like to seek sponsors, special policies and procedures apply. Please contact Melissa Platt, Director of Special Events, at 3-9067 or melissa_platt@rush.edu.

A Few Final Thoughts
Be prepared for the process. Obtaining private grant funding is challenging. There is no guarantee that there are grantmakers interested in your project or program. Additionally, a successful outcome can take anywhere from six months to several years.

Involve us early on in the process. We serve the entire Medical Center, so contacting our office early in the process allows us to determine the best course of action and produce high-quality grant proposals.

Contact us before contacting donors. In most cases, donors appreciate the ease of having a single point of contact at a large institution like Rush, so by contacting us first, you help to ensure smooth, consistent communication.

Contact Us
Sophia Worobec
Senior Director, Corporate & Foundation Relations
Sophia_Worobec@rush.edu
(312) 942-6857

Erin Shelp
Associate Director of Development
Erin_Shelp@rush.edu
(312) 942-6850

Tawanna Streater
Associate Director of Development
Tawanna_Streater@rush.edu
(312) 942-6954

Shantel Suarez Avila
Assistant Director
Shantel_Suarez@rush.edu
(312) 563-9049

Carrie Roche
Development Associate
Carolyn_Roche@rush.edu
What is a philanthropic grant? Most non-federal and non-industry sponsored grants that are funded by private corporations, foundations or organizations are considered philanthropic. If you are unsure, please call Carrie Roche at x2-4611 to confirm.

Pre-submission of grant proposal:
For research grant proposals:
1. Create a new master project and new grant within the Rush Research Portal.
   a. Select “Philanthropy” as the ‘funding type’ within the portal
2. Submit the grant through RRP for Department and Philanthropy approval
For non-research grant proposals (fellowships, scholarships, community programs, etc.):
1. Please let your Philanthropy contact (or Carrie Roche) know of your plan to submit a philanthropic grant proposal
2. Philanthropy will review your budget and proposal before you submit to the funder

Post-submission of grant proposal:
After you have submitted an application, please inform philanthropy once you hear from the funder.

If declined of funding, please let us know so we can track this.

If approved of funding, please follow these steps:
1. Inform your Philanthropy contact upon receiving notification of your approval for funding
   a. Send award notice to Philanthropy contact—we will mark it as a pledge in our system
2. Send the grant agreement to your Philanthropy contact before signing. Grant agreements need to be approved by legal and then signed by an institutional officer (from Philanthropy)
   a. If this is for a project in the portal, Philanthropy contact can route to Legal through the portal.
   b. If this is for a project outside of the portal, email directly to Philanthropy contact and they will send to Legal.
   c. Philanthropy will assist in getting the agreement approved, signed and returned to either the PI/staff or the funder.
3. Confirm if you will need a new activity number. Many philanthropic grants will have financial reporting requirements, signifying that you will need to create a new activity to track expenditures for this grant. If the grant is small (less than $25K) and/or no financial reports are required, please let Philanthropy know what activity number you would like to deposit the grant into, as no new activity creation is necessary.
   a. Philanthropy will begin the new activity form and send to PI/admin to obtain signatures
   b. Once all signatures are obtained—including Research Affairs, if needed—please return to Philanthropy (Olga Bugarin), who will work with Fund Accounting Dept. to set up a new activity.
4. Once a check is received, please forward it directly to your Philanthropy contact.
   a. Philanthropy will deposit the check into the new activity number or the activity that was requested. If the new activity creation is still in process, then the check will be deposited into a “suspense” activity until the new activity number is created through Fund Accounting. Philanthropy will send an acknowledgment to the funder.
5. Ensure that you have recorded all reporting deadlines—send reports to the funder on time!
a. Failure to meet reporting requirements could affect future funding for you or other Rush investigators. Discuss with your philanthropy contact who will lead in reporting to the funder.
As part of the Rush family, you are among thousands of colleagues working together in service of Rush’s mission. Your support is vital to our collective efforts and, most important, to the patients we all serve. Donations of different sizes from Rush employees, faculty and staff make a significant impact on Rush’s programs and efforts. We hope you’ll consider joining the hundreds of Rush employees who contribute.

**THIS GIFT IS FROM:**

Name: _______________________________  Employee ID: _______________________________

Address: _______________________________  City: _______________________________

State: __________  ZIP: __________  Phone: _______________________________

E-mail: _______________________________  Signature: _______________________________

**STEP ONE: CHOOSE YOUR AREA OF SUPPORT**

☐ Medical Center’s Greatest Needs (UNREST-28013)

☐ Other _______________________________ (please specify)

**STEP TWO: CHOOSE YOUR GIFT AMOUNT**

**Monthly Giving**

☐ $10/month ($120 annually)  ☐ $25 ($300 annually)  ☐ $42 ($504 annually)

☐ $84/month ($1,008 annually)  ☐ $209/month ($2,508 annually)  ☐ Other $_______

**Outright Gift**

☐ $50  ☐ $100  ☐ $300

☐ $1,000 (ACS Friend level)  ☐ $2,500 (ACS Partner level)  ☐ Other $_______

Annual giving of $1,000 or more qualifies for membership in the Anchor Cross Society (ACS). Please visit www.rush.edu/acs for more information about ACS giving levels and associated privileges.

**STEP THREE: CHOOSE YOUR PAYMENT METHOD**

☐ I would like to make a monthly payroll deduction gift for the amount selected above.

(Your gift will be deducted the first pay period of each month and will be automatically renewed each year. You may cancel at any time.)

☐ I have enclosed a check for my gift (payable to Rush University Medical Center)

☐ Please charge my gift to my credit card for the amount selected above

     ☐ VISA     ☐ MASTERCARD     ☐ DISCOVER     ☐ AMEX

Name on Card: _______________________________

Credit Card Number: _______________________________  Exp. Date ____/____ CVV_

Signature: _______________________________

If you have any additional questions, please contact the Office of Philanthropy at (312)942-6112 or giving@rush.edu.

**Please return this form to the Office of Philanthropy:**

1700 West Van Buren Street, Suite 250
Chicago, Illinois 60612
Introduction to Medical Simulation

Michael J. Kremer, CRNA, PhD, FAAN
Professor & Director, Nurse Anesthesia Program
Co-Director, Rush Center for Clinical Skills and Simulation

Michelle J. Sergel, FACEP, MD
Assistant Professor, Emergency Medicine – Cook County Hospital
Co-Director, Rush Center for Clinical Skills and Simulation
• Ethical tension
• Creating a safe environment
• Medical emergencies / critical care
• Didactics and on-the-job experience
• Interface between the two…
Silos of Work and Training

RNs

MDs

PharmDs

RRTs

Technicians
Support Staff

Silos contribute to medical errors!
Medical Errors

National Medical Errors %

- Diagnosis
- Failure to prevent injury
- Drug
- Other
- Technical Errors

Occurrences per 1000 patients admitted
Medical Errors

National Medical Errors %

- Diagnosis
- Failure to prevent injury
- Drug
- Other
- Technical Errors

Occurrences per 1000 patients admitted
Simulation in Anesthesia & Aviation

First aircraft simulator, created by Edwin Link, 1929

SIM1 Anesthesia Simulator, 1969
Wang Wei-Yi developed 2 life-size bronze statues to teach surface anatomy and location for acupuncture points (1000 AD).

Cultural prohibitions against inter-gender contact in China -> female pt pointed to symptomatic area on a carved figurine

Small carved human figures with representations of internal anatomy used for childbirth education in 17th/18th century Europe
Realistic Life-Size Simulators

• 1730: Work began in Bologna on development of first anatomic simulators for medical education

• 19th century:
  – Anatomy exhibitions for entertainment
  – Moulage: wax models of body parts showing manifestations of disease
  – German anatomic simulators made from plaster
Obstetric Simulators

Types of Simulation
High-fidelity Simulation Mannequins

• Wireless, tetherless
• Realistic bodily secretions, JVD
• Heart, breath & bowel sounds
• Blood, fluid and power sources all contained in mannequin
Procedural Skill Simulation

- Task trainers
- Mannequin-based
- Standardized patients
- Cadaveric
- Virtual reality
Task Trainers
• Built in 2002
• Generous donation from Cornell Trust
• Early collaboration with Illinois National Guard on bioterrorism training
• Outgrew the 1800 square foot facility as technology & pedagogy advanced
The Future - Simulation at Rush

- Virtual reality room (VROOM)
- Standardized patient program
- Parts lab - engineering
Simulation at Rush
Simulation at Rush
Simulation at Rush

- Innovative
- Evidence-based
  - Society for Simulation in Healthcare
  - Association of Standardized Patient Educators
- We believe our trainees are intelligent, well-trained, and are trying to do their best to learn and improve (CMS, 2015)
  - Center for Medical Simulation
• Adult learners:
  – Independent and self-directed
  – Have rich experiences
  – Value relevant learning
  – Prefer problem-centered approaches
  – Are internally motivated

(CMS, 2015)
The Learning Pyramid*

Average Retention Rates

*Adapted from National Training Laboratories. Bethel, Maine
Components of a Course

- Needs assessment
- Learning objectives
- Course logistics
- Scenarios
- Assessment instruments
- Course evaluation

(CMS, 2015)
Needs Assessment

- Who are your stakeholders?
- What are their needs?
- Why should they buy in?
- Where are the content sources?
  - Existing curriculum
  - Insurance files/risk management
  - QA data
  - Case reports
  - In-training exam results

(CMS, 2015)
Learning objectives

• Always from the perspective of the **learner**

• What will they be able to do at the end of the learning experience? (Bloom’s taxonomy)

• Consider:
  – How will learner **demonstrate** they can do what you say they will be able to do?
  – How will you **measure** what you claim?

(CMS, 2015)
Course logistics

• Scheduling can be a challenge
• Finding a reasonable timeline can be a problem
• Think about certifications in advance
• Budgeting considerations
  – Cost vs value model
  – Charging method – seek lowest overhead

(CMS, 2015)
Scenario development

- Learning objectives
  - Clinical: easy
  - Behavioral: hard
- Plot
- Debriefing guide

- References
- Medical record
- Simulator script or flow
- Set-up sheet

See RCCSS Scenario Development Form

(CMS, 2015)
Technology

- Let the curriculum guide the technology and not vice-versa
- Choose the best simulator for the job
- Consider hybrids of:
  - Live standardized patient
  - Mannequin simulator
  - Part-task skill simulator
  - Screen-based

(CMS, 2015)
Course evaluation

- Likert scale
  - Trends toward positive
  - 5-7 point
  - Anchored, choice of adjectives, etc.
- Written comments
  - Hard to analyze
- Verbal comments
  - Will people be forthcoming?
- Surveys
  - Compliance, when?
- Interviews
  - Difficult to analyze
- Clinical data

(CMS, 2015)
THANK YOU

Questions?

• Center for Medical Simulation. Institute for Medical Simulation Comprehensive Instructor Workshop. Available at: [www.harvardmedsim.org](http://www.harvardmedsim.org)