



Spring 2024 Core Director's Meeting

May 30, 2024



UNC

SCHOOL OF
MEDICINE

Office of Research Technologies and CFAC Updates

Spring Staff Recognition Awards

- Once again, we received many great nominations and this was a very, very competitive group. THANK YOU if you took the time to nominate someone.
- Moving forward we will keep nominations on file and will reach back out at the beginning of an award cycle to ask nominators if they would like to update their nomination
- Congratulations:
 - Gabriela de la Cruz – Pathology Services Core – Performance Excellence
 - Bentley Midkiff – Pathology Services Core – Technical Achievement
 - Rossana Roberts – Abacus Evaluation – Customer Service

- Large fluctuations in power (flickering) can overwhelm typical surge protectors. Computers can get “fried” in these events, even if they are plugged into surge protectors. Also, SOM IT advises that once surge protectors have experienced those power fluctuations, they may be less effective in handling future power surges
 - Consider using a UPS
 - If your core has surge protectors that have experienced these kinds of power fluctuations, consider replacing them even if there was no catastrophic failure at that time.

UNC Core Mentorship Group

- Mission is to provide peer mentorship and community for directors of core facilities
 - Founding committee members: Dr. Michelle Itano, Wendy Salmon, Dr. Brandie Ehrmann, and Leslie Fulcher
 - Monthly(ish) meetings to discuss any and all topics related to leading and managing a core facility
 - Other opportunities for community (keep an eye out for a community potluck!)

Informational IN
PERSON meeting
Tuesday July 23rd
11:30 – 1 pm (lunch
provided!)



- Calendar of events will be e-mailed in June.
- Next round of travel award applications will be open July 1st-31st
 - We will award \$1,000 each for up to 5 applicants to attend a conference later this fall/winter
- Next October we will hold another “All-Core Poster Session” during Research Week

- Voucher Program
 - This is funded using SOM Strategic funds. We have not received confirmation yet as to this aspect of our budget for FY25
 - IF the voucher program is run in FY25 it will be much earlier in the year (July/August) to allow work to be completed and funds spent down by the end of the fiscal year.
- Plan to hold a fall and spring RFA for equipment, method development, matching funds, and general core needs as usual.
- NEW form for submitting equipment and matching fund requests

- Annual meeting for the Mid-Atlantic Directors and Staff of Scientific Cores (MAD SSCi) is August 14-16, 2024 hosted by Rutgers University (NJ)
 - Pre-meeting workshops: **Leadership with Care Tactics and Best Practices for Managing Animal Related Cores**
- Association for Biomedical Resource Facilities (ABRF)
 - 2025 meeting is in Las Vegas, NV
 - Opportunity to present lightning talks on original research, method development, optimization, etc. in cores)
 - Opportunities to network with peer core facilities to do original research as part of research groups (publications, talks, etc.)

New Request Form

- New form is available on our website and will be sent out with upcoming RFA announcements. Should be used for:
 - CFAC Equipment requests as part of a CFAC RFA
 - Institutional support funds to support an external instrumentation grant or for support for equipment requested in a PI-led grant
 - Collaborative financing (internal funding from multiple sources).
 - Equipment requests from LCCC cores for LCCC-only funding

New Request Form: Why?

- Goal of the form is to provide greater transparency and strategy in equipment purchases, particularly those requesting funding from multiple units (including matching funds for CFAC RFAs).
 - Requested by SOM basic science department chairs and Office of Research to create a more transparent process for requesting equipment funds of other departments.
- You may still request and secure funds ahead of submission from your home department or center (EXCEPTION- LCCC administered or supported core will submit this form to request matching funds of LCCC at the same time as requesting CFAC funds. Only one form/request needed!)

New Request Form: What's New

- Core facility leadership sees the “big picture” of requests for capital equipment
- Requests can be submitted before all funding options are finalized, providing support to core directors in deciding who to approach.
- Strategically review all requests to determine where support from specific units would be most impactful
- Standardization of the presentation of the requests to potential stakeholders
- LCCC and CFAC funds may be requested simultaneously with one form
- Establishes an MOU outlining all financial contributions which will be distributed to all stakeholders and the core director

How Does it Work?

- Form submissions will be accessible to Kara Clissold and Chris Gregory (ORT/CFAC), Holly Dressman (LCCC). Meghan Kraft and Ben Wright (OVCR Research Core Development).
 - Additional access may be granted on a case-by-case basis or at the request of other schools.
 - This DOES NOT replace the OVCR funding request form
- Requests **not** tied to a CFAC Equipment Request will be assigned to a reviewer to carry it through to completion.
 - Holly will review any requests from LCCC cores for CFAC funds or submissions that request LCCC funds
 - ORT/CFAC will review all requests from SOM cores
 - OVCR Research Core Development team will review requests from non-SOM cores

Best Practices in Accounts Receivable (A/R) Reporting

- Thank you to everyone helping us clean up A/R!
- Infoporte and iLab send reminders every 30 days for invoices still listed as outstanding. However, resolution of A/R is most effectively done by the core director who developed a relationship with the customer.
- It is much harder to follow up on A/R over 90 days than newer A/R! We know payment processing can take a long time, but it is appropriate to follow up sooner rather than later.

Accounts Receivable: Finding Misplaced/Misapplied Payments

- If a customer relays that payment has been remitted, but it is still showing as outstanding on our side, collect the following information from your customer :
 - Date of payment, payment type, amount remitted, and if multiple invoices were combined into one payment
 - ACH payments (wire transfers): Payment transaction information including the last 4 digits of the account the money was sent to, and any details listed (such as invoice numbers)
 - Check: Check number, address check was sent to, any descriptive information listed on the check
- Then, reach out to Ben Wright or Kara Clissold for help tracking down payments

Accounts Receivable: Specific tips and tricks

- Infoporte
 - If your customer switches payment methods, this results in a new invoice being generated. Thus, the original invoice must be marked “uncollectible” in Infoporte
- iLab
 - When a new external core customer registers on iLab, emphasize that they should provide the financial contact information for whoever is responsible for paying their invoices. When iLab generates an invoice, it is only accessible to people “in the system” – and it is easier to set people up in the system from the beginning
 - If the customer requires an invoice to be sent to a central inbox (ex. invoices@abc.com) – this email address can be added into iLab. To add, submit an iLab help ticket or contact CoreSupport@med.unc.edu.
 - Payments from external customers who pay by credit card happens automatically. We encourage this method of payment when possible.

Durham Tech Community College Internship Program

- Durham Tech BioWorks Certificate (5-month CE program, students from all levels and backgrounds). Trains students in:
 - GMP
 - Quality Systems and SOPs
 - Basic chemistry and math (concentrations, pH, etc.)
 - Using major lab equipment
 - Pharma processing
 - Aseptic technique, including cell growth and fermentation
- As a partnership with DTCC, we are interested in offering paid internships/apprenticeships to BioWorks students in our cores
- Student intern would work in core for 6-12 months; could be hired after internship. CFAC would consider covering partial salary
- Show of hands or send an email with interest in the program

ABRF 2024 Session: Metrics That Matter

- University of Minnesota shared tools for tracking the adoption of new technologies based on citations in published literature. *Used to guide investment*
- Northwestern University Feinberg SOM discussed their homegrown transaction processing system (Nucore) that allows customers to request services, reserve equipment, and purchase items. Core directors and staff can run real-time reports using user-defined parameters. *Used to assess core utilization*
- UNC-Chapel Hill SOM shared our publication tracking workflow and planned automation for cores to capture acknowledgments. *Used to determine ROI and support of grants*

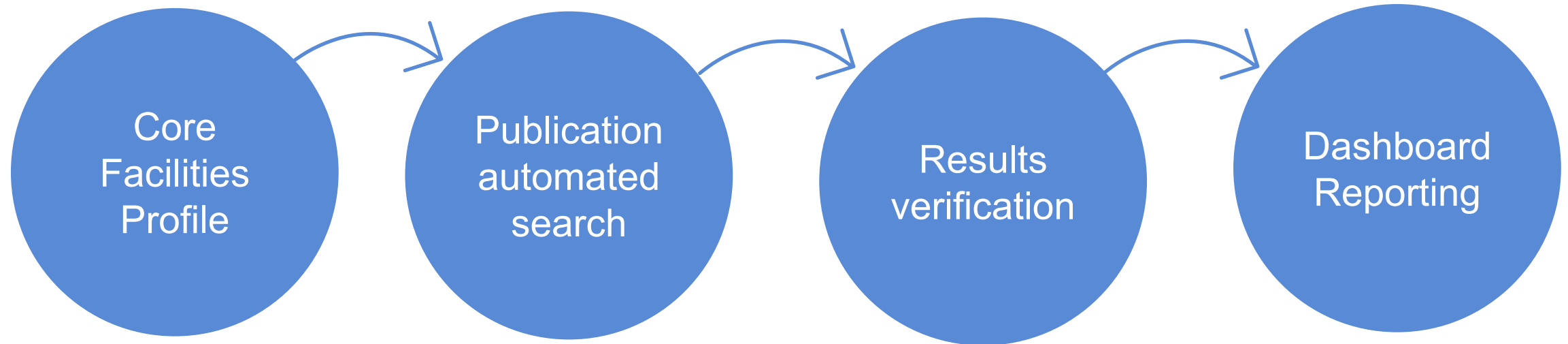
The Importance of Measuring Scientific Impact of Shared Resources

- Shared resources often generate much of the data and/or perform data analysis for peer-reviewed publications and grants
- Personnel in shared resources may not be included as co-authors
- Scientific impact in an academic setting is reflected by the number, quality, and citation index of primary research articles
- Strategic investment decisions for shared resources should be driven by return-on-investment (ROI) data (including demand, customer satisfaction, grants supported, quality, financial management, technology, and publications)

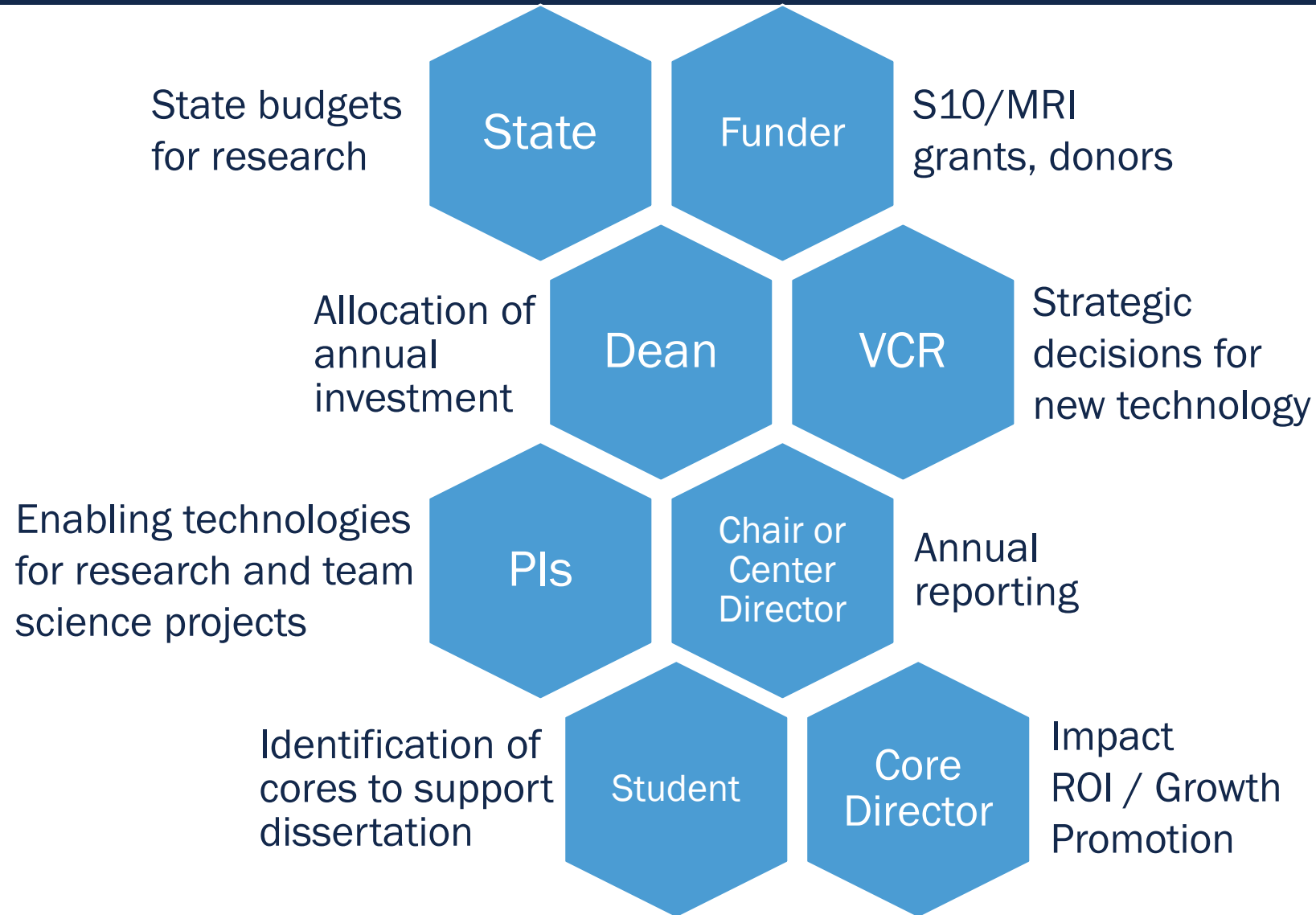
Old vs New Methods

- Previously, core acknowledgments at UNC-Chapel Hill were tracked with a simple PubMed search (through NCBI tool) using only the core names and “UNC Chapel Hill”. The search string captured data for 48 core facilities with 1.0 ± 0.2 identifiers used per core facility.
- Our new comprehensive method captured publication data for 64 core facilities using 4.6 ± 2.4 identifiers per core facility.
- For 2021, the simple search strategy above identified 108 publications acknowledging UNC-Chapel Hill core facilities. The new comprehensive search strategy identified 1,323 verified publications (12x increase).
- Since 2017, UNC cores have been acknowledged more than 1,000 times per year in published papers.

Designing Data Flow and Visualization



ROI Metrics Utilization



Contact Information

- Kara Clissold
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- Chris Gregory
(christopher_gregory@med.unc.edu)
- Office of Research
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(corefacilities@med.unc.edu)

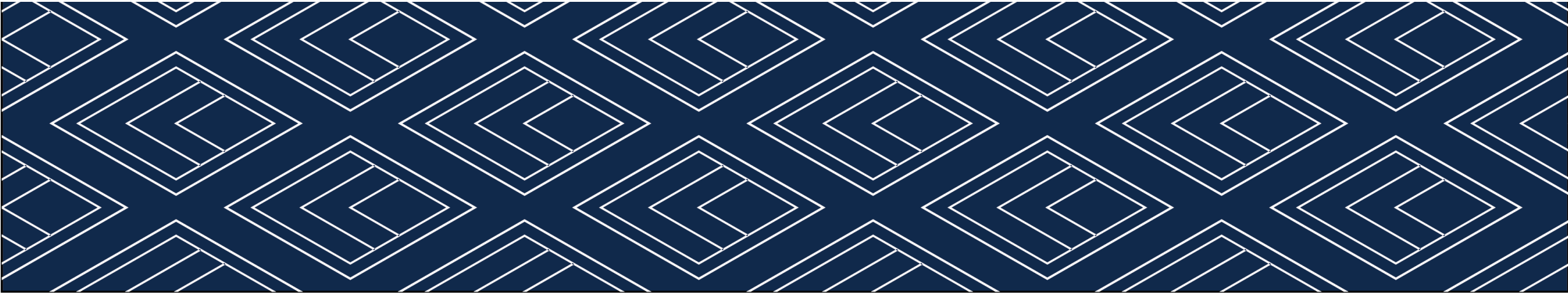


Research Core Development

Meghan Kraft - Interim Director of Research Core Strategy

Ben Wright - Director of Research Core Development

Michael Akridge - RCD Financial Analyst



iLab News and Updates

- Questions, access, and support: CoreSupport@med.unc.edu
- Successfully transitioned to CBM effective 5/6/2024
 - Increased efficiency; more information for campus; no impact to cores
 - Still resolving a few minor issues
 - Invoice payment status
 - Bill Presentation
 - We will provide updates via email and website as soon as possible
- Quarterly iLab information sessions and office hours
 - Beginning Fall 2024, dates and info coming soon
- 11 cores onboarded since May 2023; 5 seats available for CY2024
 - General info about iLab: [iLab | OSP | Office of Sponsored Programs \(unc.edu\)](#)

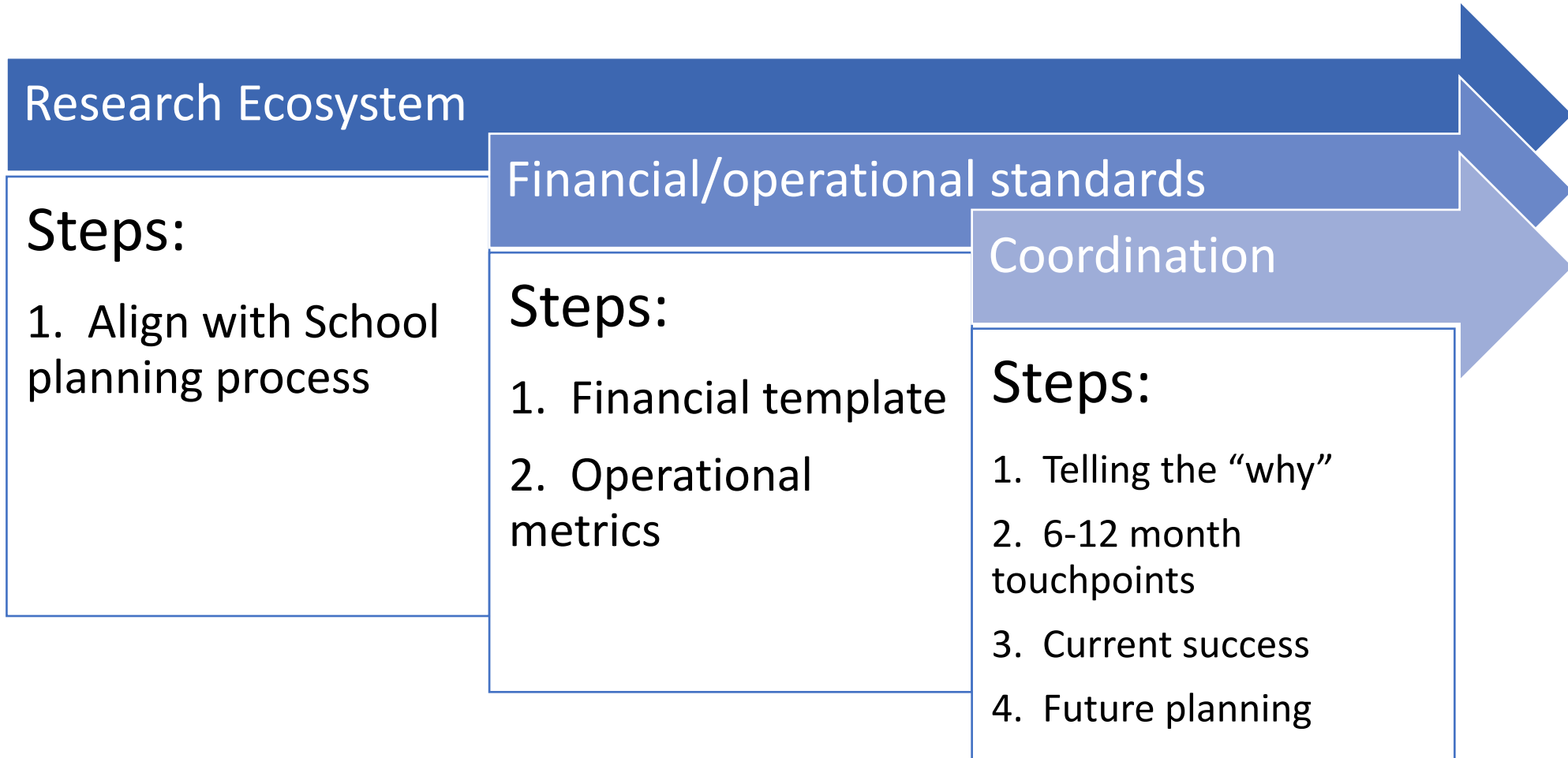


Core Metrics and Reporting

- Tableau Financial Reports updates
 - Updated dataset for incoming balances
 - Fixed sign issue on comparison report
 - Working on adding salary information for core staff
- iLab reports
 - Working with iLab API to see if we can transition to Tableau for reports
 - iLab training resources available on RCD webpage
 - <https://osp.unc.edu/core-facilities/ilab/>
 - “iLab Training” tab



Integration and Information



Presentation Objectives

Create transparent forum for routine review of performance against the Center's/Office/Recharge Center's strategic plan, objectives, and/or goals

Review operational performance including funds received and fiscal oversight of all expenses over each fiscal year of operation

Share quality, quantity, and impact of scholarly work, teaching, and service (as appropriate with mission)

Analyze and assure alignment with School mission and overlap with University operations

Serve as venue to plan and offer support to opportunities or removal of barriers to guide success

Financial Projection

12-month Revenue and Expense Estimates

	Actuals	Projections	Projected
	FY24	FY25	Change
Revenue	\$1,400	\$450	-68%
Salary & Fringe Benefits	\$90	\$100	11%
Materials & Supplies	\$100	\$90	-10%
Equipment Maintenance Contracts	\$100	\$100	0%
Other	\$1,000	\$100	-90%
Total Direct Expense	\$1,290	\$390	-70%
Fund Balance	\$110	\$60	-45%

Note: Core can work with business manager to compile financial information; Tableau financial reports are also available for core source activity; RCD is also a resource



Where to Find the Data – Financial Projection

Tableau Cores – Totals Report

- [Cores - Totals: Totals - Tableau Server \(unc.edu\)](#)

Tableau Cores – Expenses Report

- [Cores - Expenses: Expenses - Tableau Server \(unc.edu\)](#)

Tableau Core Facility Financial Reports (All): [Cores - Tableau Server \(unc.edu\)](#)

For access, questions, and support, reach out to RCD@unc.edu

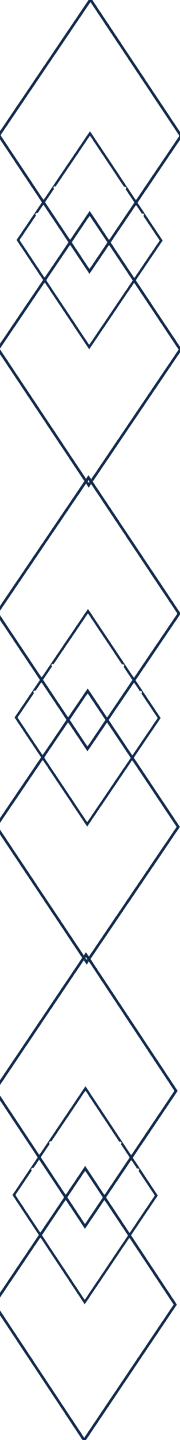


Users and Usage

Combined users of all services

	Current		Projected	
	<i>Count*</i>	<i>%</i>	<i>Count*</i>	<i>%</i>
Internal Customer Usage	6,059	100%	7,000	99%
External Customer Usage	27	0%	40	1%
<i>Total Usage (# of units)</i>	6,086	100%	7,040	100%
Internal Customer Users	169	98%	200	95%
External Customer Users	4	2%	10	5%
<i>Total Users (# of labs)</i>	173	100%	210	100%

Note: This can be shown in units of measure or in \$ of revenue generated. Both metrics are important in analyzing the performance of services.



Where to Find the Data – Users & Usage

iLab – Reporting Tab

- Introduction to iLab Reporting Training Video – [Link Here](#)
- More specific reporting videos coming soon – let us know what you want to see!

Path to Create Report

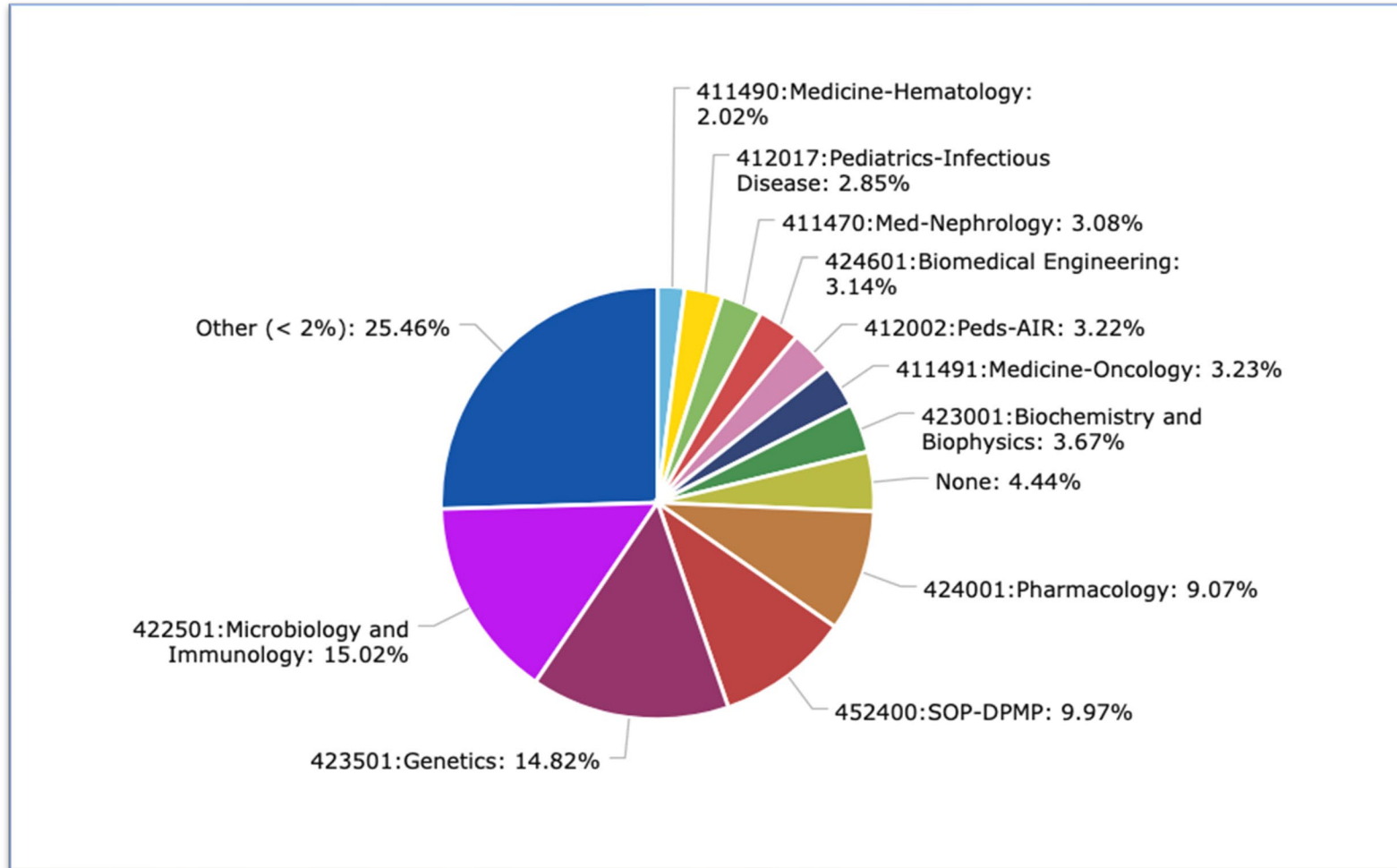
- Reporting -> Charges -> Date Range -> Data Table or Pie Chart -> Service -> Quantity (then change to total cost) -> Month or Quarter

iLab Training Videos: [iLab | OSP | Office of Sponsored Programs \(unc.edu\)](#)

For access, questions, and support, reach out to CoreSupport@med.unc.edu



Usage by Department (Pie Chart)



Where to Find the Data – Usage by Department

iLab – Reporting Tab

- Introduction to iLab Reporting Training Video – [Link Here](#)
- More specific reporting videos coming soon – let us know what you want to see!

Path to Create Report

- Reporting -> Date Range -> Pie Chart -> Dept -> Total Cost (then use filters)

iLab Training Videos: [iLab | OSP | Office of Sponsored Programs \(unc.edu\)](#)

For access, questions, and support, reach out to CoreSupport@med.unc.edu



Other Datapoints and Metrics

What other data help show the impact of your core?

- Users ranked (largest to smallest by volume, either revenue \$ or usage)
- Publication metrics
- Student population impact
- ROI of subsidy or pilot data

Need to present to your department/school leadership?

Let us know and we'll be happy to help!



Contact Information

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OSP RCD Webpage: <https://osp.unc.edu/core-facilities/>

