

Research Core Development Updates and Initiatives

Ben Wright, Director of Research Core Development
Office of Sponsored Programs

Kara Clissold, Associate Director
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September 28, 2023

2023 SYMPOSIUM
FOR RESEARCH ADMINISTRATORS

Contact Information

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FY2023 Highlights

110 official recharge centers; approx. 125 total research cores

Total Revenue Generated: \$43 million (\$41 million FY2022)

Research Supported:

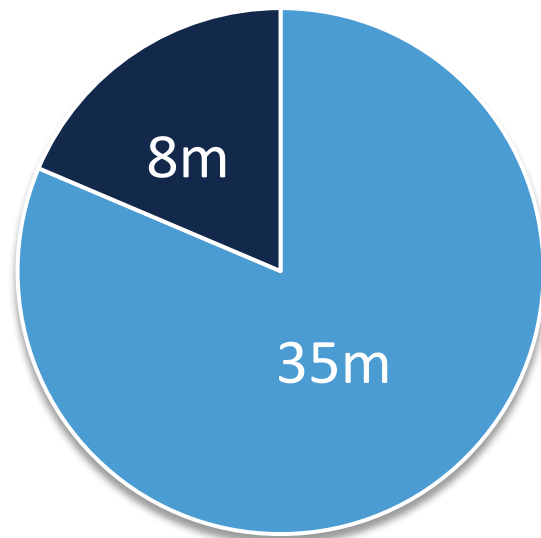
700 labs on campus

40 external universities

40 external businesses

FY2023 Revenue Metrics

FY2023 Total Revenue: \$43 million



■ Internal Revenue ■ External Revenue

Sponsored Research

\$7.6 million generated in F&A

2,152 projects charged

Total impact to research: \$1.6B*

Core Support Infrastructure at UNC

Research Core Development Team (OSP/VCR)

Ben Wright – Director RCD
Meghan Kraft – Interim Director
Research Core Strategy
Michael Akridge – Financial Analyst

OSP Cost Analysis & Compliance

Brian Bertlshofer – Director
J.R. Pike – Manager
Latoia Smith – Lead Analyst
David Coyle – Cost Analyst
Valeshia Dobson – Cost Analyst

Office of Research Technologies (SOM)

Chris Gregory – Director
Kara Clissold – Assoc. Director

Lineberger Comprehensive Cancer Center (SOM)

Holly Dressman – Asst. Dir. of
Shared Resources and Operations

UNC College of Arts and Sciences

Jim Cahoon – Exec. Dir. of Research
Core Facilities

Core Support Infrastructure at UNC

Research Core Development Team (OSP/VCR)

- Partner with departments, schools, and existing recharge centers to develop a campus-wide Core strategy
- Survey equipment and resources to establish a central asset repository
- Consult on core management, business process improvement and marketing
- Provide options for treatment of volatile rates and assist with more frequent rate reviews
- Manage iLab adoption and training
- Serve as *ad hoc* members of CFAC

OSP Cost Analysis & Compliance Team

- Initiate rate reviews on biannual basis
- Review operating plans and rate development worksheets
- Approve rates and provide MOAs
- Ensure compliance to financial policies for recharge centers

Office of Research Technologies (SOM)

- Supports cores with all operational processes, from starting a new core to rate reviews and developing operating plans
- The Core Facility Advocacy Committee (CFAC) provides funding
- Advocates within the School of Medicine with a commitment to all cores within the UNC Chapel Hill ecosystem
- Educates core personnel on areas of interest, including providing ABRF membership and supporting grant writing, career development and sustainability initiatives

LCCC (SOM) Asst. Director

- Partner with existing recharge centers in LCCC to support operations, finance, funding requests, etc.
- Consult on core management and business process improvement
- Assist with solutions for marketing core facility services
- Serve as *ad hoc* member of CFAC

UNC College of Arts and Sciences Exec. Director

- Partner with existing recharge centers in CAS to support operations, finance, funding requests, etc.
- Consult on core management and business process improvement
- Assist with solutions for marketing core facility services
- Serve as liaison with Research Core Development Team (OSP/VCR) and ORT (SOM)
- Serve as *ad hoc* member of CFAC

Research Core Development Outreach

58 core tours CY2023

- Thank you!

Research Week Core Open House Tours

- Monday October 23 – Wednesday October 25
- <https://www.med.unc.edu/corefacilities/research-week-core-tours-2023/>
- Open house tours of over 40 UNC core facilities
- Please pass the word along to customers, colleagues, etc.

Rate Reviews



OSP Cost Analysis and Compliance Team performs reviews



Reviews completed since October 2022: 69



Median time to complete rate review: 92 days



Rate review status information available in Tableau "Totals" dashboard



Templates and FAQs available on RCD webpage

Financial Reporting



Financial reporting tools available via Tableau. Access for over 100 cores and 300 users.



<https://tableau.unc.edu/#/site/oris/projects/1282>



For questions, technical issues, or to request access changes, please contact RCD@unc.edu

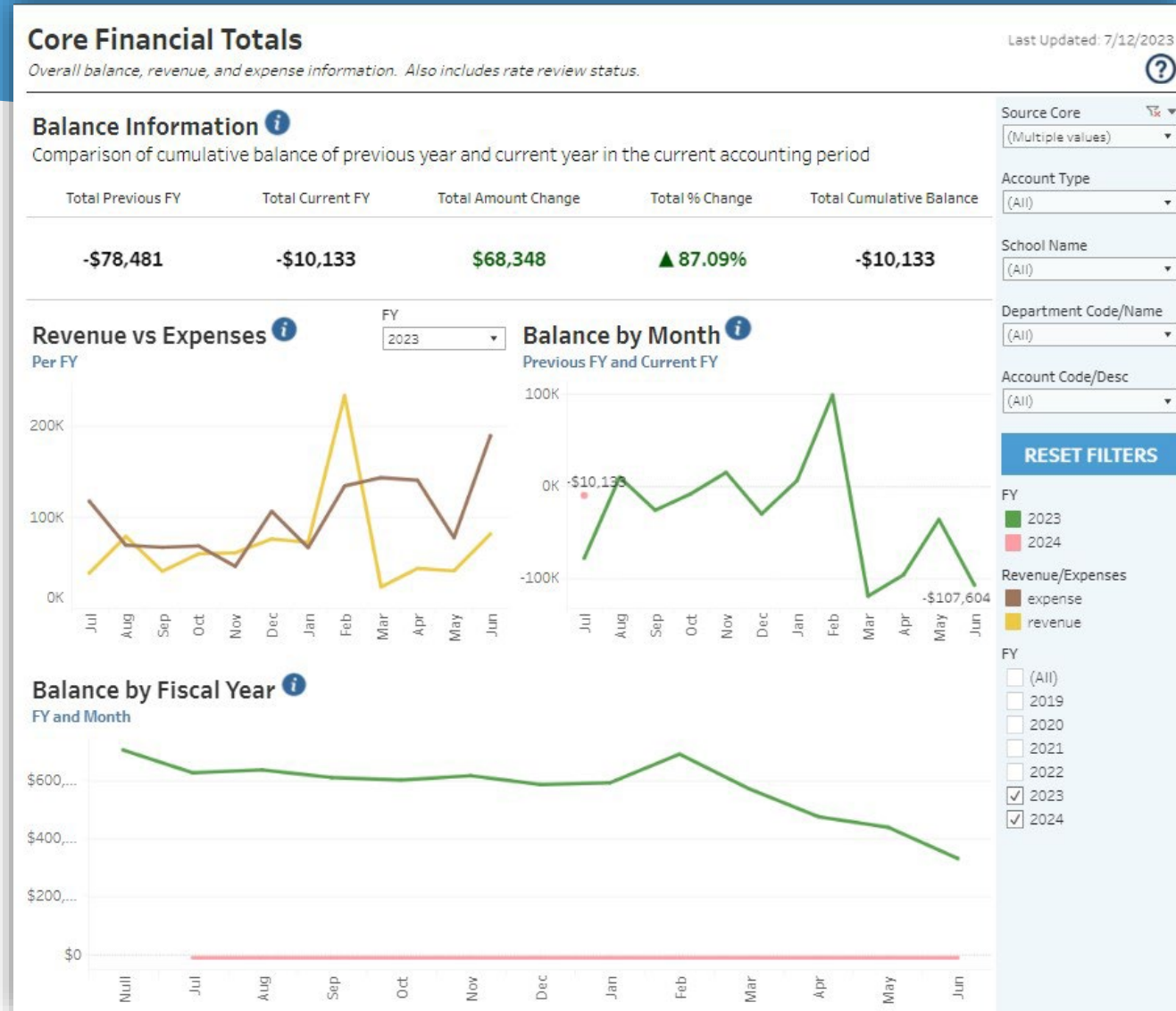


Link, training session recording, and FAQ document located on RCD Webpage



Rate Review status available via “Cores – Totals” dashboard

Cores - Totals



$$\begin{aligned}
 &\text{Revenues} \\
 &- \text{Expenses} \\
 &+ \text{Balance Carryforward} \\
 &+ \text{Transfers} \\
 \hline
 &\text{Total Balance}
 \end{aligned}$$

- One-stop-shop for all financial data
- Reports expenses and revenue charged to core source – no subsidies or grant funding yet
- Filters at right can be used to refine data shown
- FY filters available for most elements
- **Rate review information at bottom of dashboard**

Cores – Financial Data

All Financial Data
revenue and expense data.

Last Updated: 7/12/2023

Row ID	journal_id	fiscal_year	budget_per..	accounting..	accounting_date	source	core_name	activity_ty..	account_ty..	account_group	account	account_description	reference1	reference2	chartfield1	chartfield2
2821499	30116:AR3	2023	2023	11	05/22/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	537210	Educational and res...	20235160	Null	Null	Null
2821500	30122:ARG	2023	2023	11	05/22/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	537210	Educational and res...	2023516274	Null	Null	Null
2821501	31032:ARG	2023	2023	12	06/22/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	537210	Educational and res...	2023622735	Null	Null	Null
2821502	31033:AR3	2023	2023	12	06/22/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	537210	Educational and res...	20236170	Null	Null	Null
2821503	ACC0876293	2023	2023	2	08/16/2022	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	538110	Miscellaneous non...	Null	200069653	Null	Null
2821504	ACC0918179	2023	2023	8	02/18/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	538110	Miscellaneous non...	Null	200074355	Null	Null
2821505	ACC0934366	2023	2023	10	04/25/2023	19050	Cystic Fibro...	expense	non-payroll	SUPPLIES	538110	Miscellaneous non...	Null	200076222	Null	Null
2821506	25421:PCD	2023	2023	5	11/12/2022	19050	Cystic Fibro...	expense	non-payroll	MISC_EXPENSE	558913	Laboratory Analyti...	11/07/2022	Null	Null	Null
2821507	ARD0872986	2023	2023	1	07/31/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821508	0000877867	2023	2023	2	08/24/2022	19050	Cystic Fibro...	revenue	revenue_in..	NO_BILL	441845	Sales-Intra Univers...	Null	Null	Null	Null
2821509	ARD0867538	2023	2023	1	07/11/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821510	ARD0872986	2023	2023	1	07/31/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821511	ARD0871754	2023	2023	1	07/27/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821512	ARD0871754	2023	2023	1	07/27/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821513	ARD0870314	2023	2023	1	07/21/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821514	ARD0870314	2023	2023	1	07/21/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821515	ARD0869683	2023	2023	1	07/19/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821516	ARD0868786	2023	2023	1	07/14/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821517	ARD0868531	2023	2023	1	07/14/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821518	ARD0879858	2023	2023	2	08/31/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821519	ARD0919356	2023	2023	8	02/22/2023	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821520	ARD0917281	2023	2023	8	02/16/2023	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821521	ARD0946574	2023	2023	12	06/05/2023	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821522	ARD0866312	2023	2023	1	07/01/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821523	ARD0876041	2023	2023	2	08/16/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821524	ARD0875409	2023	2023	2	08/11/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821525	ARD0875409	2023	2023	2	08/11/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821526	ARD0875408	2023	2023	2	08/10/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821527	ARD0875152	2023	2023	2	08/11/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821528	ARD0873790	2023	2023	2	08/04/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821529	ARD0880148	2023	2023	2	08/31/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null
2821530	ARD0880148	2023	2023	2	08/31/2022	19050	Cystic Fibro...	revenue	revenue_ex..	NO_BILL	441911	Sales-Other Outside	Null	Null	Null	Null

FY: 2023

Source Core: (All)

Account Code/Desc: (All)

Account Type: (Multiple values)

School Name: (All)

Department Code/Name: (All)

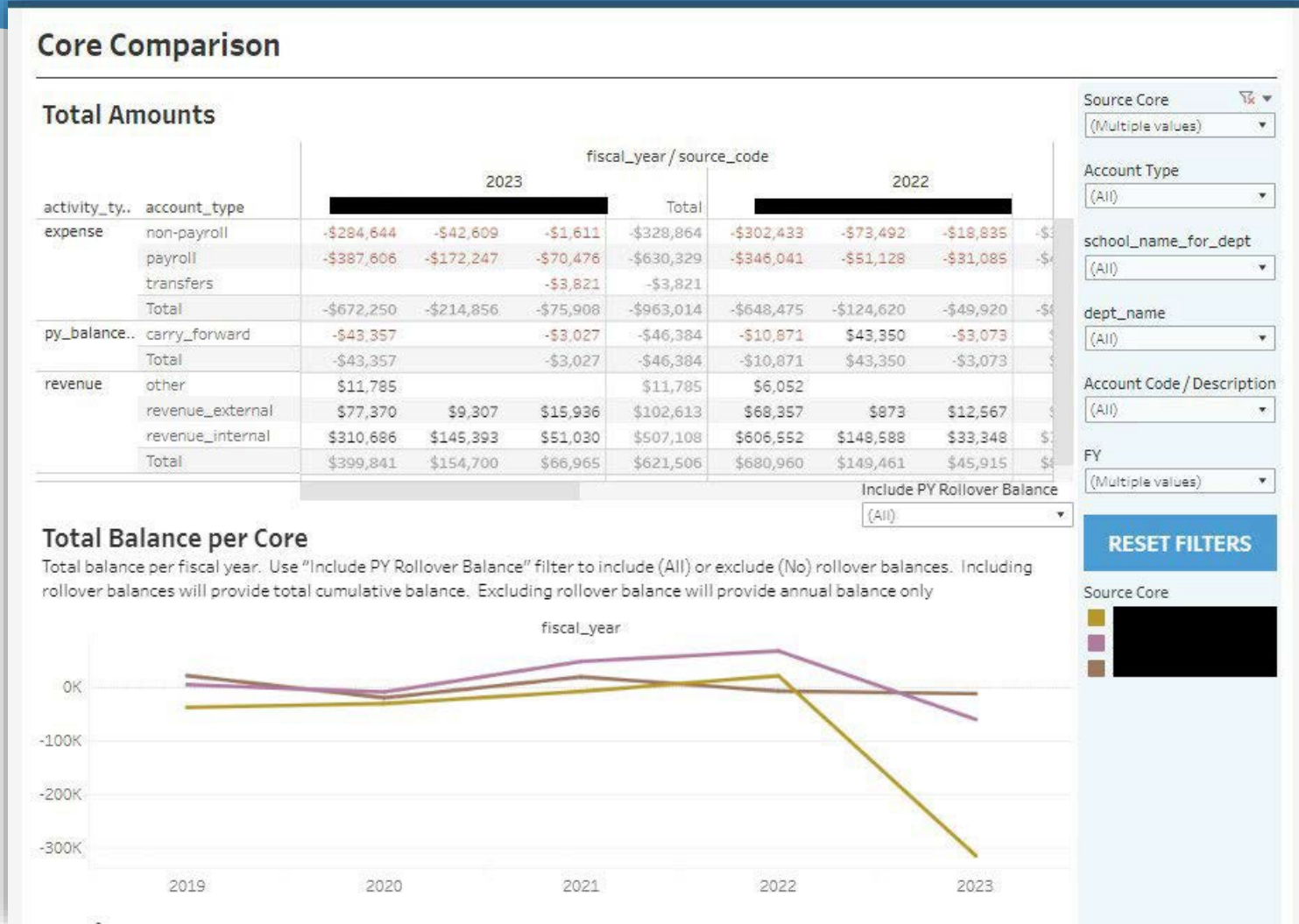
Budget Period: (All)

RESET FILTERS

Use the filters above to get the data you want and then click the download button in the top right and select Data.

- Transactional detail for core since 2018
- Filters available at right
- Ability to export to Excel
- Accounting Date and Transaction ID included

Core Comparison



- Information for multiple cores
- Each core presented separately
- Use filters to adjust view as needed
- Cores are limited to user's access

iLab Information and Updates



CoreSupport@med.unc.edu for iLab support

Michael Akridge, Financial Analyst, OSP



8 cores onboarded during CY2023

If interested in more information or a demo, contact us

iLab Improvements



Training and guidance documents coming soon!

Let us know what you need.



Subsidy Function



Collaborating Cores Function

iLab Institutional Landing Page

[About UNC Cores](#)

[UNC Core Facilities by Category](#)

[Search](#)

iLab Cores at University of North Carolina at Chapel Hill



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Cores at Analytical Chemistry

Core Name	Primary Contact
<p>(CHASE) Center for Hybrid Approaches in Solar Energy to Liquid Fuels Our mission is to develop molecule/material hybrid photoelectrodes for cooperative sunlight-driven generation of liquid fuels from carbon dioxide, nitrogen, and water.</p>	Renato Neiva Sampaio
<p>Chemistry NMR The Chemistry Department's Nuclear Magnetic Resonance (NMR) Core Laboratory provides training and access to NMR spectroscopy. We also participate in NMR investigations of chemical samples, prepare samples and acquire data.</p>	Marc ter Horst
<p>Mass Spectrometry Core Laboratory We provide equipment, expertise and training in small molecule applications utilizing mass spectrometry in an open-access facility. We also support high-throughput catalysis research for inorganic and organic research labs in our Reaction Innovation Sub-Core for Excellence (RISE) Catalysis Center.</p>	Brandie M. Ehrmann, Ph.D.
<p>X-Ray Crystallography Core Laboratory (XCL) XCL primarily functions as a service crystallographic facility for the University and are actively collaborating with Department of Chemistry, Inorganic, Organic, and Material Division, Physics and Astronomy, biology, as well as the School of Pharmacy and the School of Medicine.</p>	Chun-Hsing (Josh) Chen, Ph.D.

RCD Webpage



FAQs, rate review document templates, and guidance documents



Financial reporting link, guidance, and training presentation



Research core agreements



Future enhancements



<https://research.unc.edu/sponsored-programs/resources/research-core-development/>

RCD Webpage

[About](#) [Resources](#) [Research Core Agreements](#) [News & Events](#) [Contact Us](#) [FAQs](#) [Feedback](#)

Core Facility Financial Reporting

- [Core Facility Financial Reports](#)
- [Core Facility Financial Reporting Tableau Reports Frequently Asked Questions](#)
- [Core Facility Reporting Tools Session](#)

Rate Review Guidance

- [Research Service Center Operating Plan Form Instructions](#)

Research Core External Agreements

- [Research Core Agreements Guidance](#)

Resources

- [UNC SOM Core Facilities Website](#)
- [Core Facilities Advocacy Committee \(CFAC\)](#)
- [OSP Operating Standards: Office of Sponsored Research – 900.01 – Research Service Centers](#)
- [NC Biotechnology Center Cores Website](#)
- [iLab](#)
- [Research Service Center Rate Increases](#)

Forms

- [RSC Operating Plan Form](#)
Clicking the link for the Operating Plan Form will automatically download the form to your computer's designated download folder. Open the file from that download folder using Adobe Acrobat DC or Adobe Acrobat Reader.
- [Rate Development Worksheet – With Member Subsidy \(30 rates\)](#)
- [Rate Development Worksheet – No Member Subsidy \(30 rates\)](#)

If your core expects to utilize more than 30 rates, please use the following worksheets:

- [Rate Development Worksheet – With Member Subsidy \(50 rates\)](#)
- [Rate Development Worksheet – No Member Subsidy \(50 rates\)](#)

Asset & Equipment Database



RCD currently working with ORIS to create an asset database



Ability to record and track equipment and service contracts



Greater discounts on purchases and service contracts



Ability to forecast useful life and anticipate replacements

Office of Research Technologies Core Updates

Kara Clissold

Associate Director, Office of Research Technologies



September 28, 2023

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FOR RESEARCH ADMINISTRATORS

SOM Office of Research Technologies



Christopher W. Gregory, PhD
Director



Kara A. Clissold, MA
Associate Director



Within the Office of Research in the
School of Medicine



Reports to Dr. Blossom Damania, Vice
Dean for Research



<https://www.med.unc.edu/corefacilities>

SOM Office of Research Technologies

Since 2008, ORT has focused on:

- Advocating for cores within the School of Medicine through CFAC
- Supporting cores with all operational processes: starting a new core, rate reviews, developing operating plans, preparing for audits, process mapping, marketing
- Educating core personnel on areas of interest (e.g., communication strategies, SWOT analysis, “green” initiatives); providing ABRF membership and supporting grant writing, career development and sustainability initiatives, brought iLab onto campus
- Core Facility Advocacy Committee (CFAC) provides funding for method development, equipment, PI vouchers, training/certifications, and emergency requests - to all eligible UNC cores

Current Initiative: Support for Instrumentation Grant Submissions

Assess needs of core directors and encourage short- and long-term planning of replacement or addition of core equipment

Assist core directors in identifying funding mechanisms appropriate for the equipment they need (CFAC, NCBC, NIH, NSF, DoD)

Facilitate connection to a core director who has successfully utilized that mechanism and who can serve as a peer mentor and connect with other resources on campus to improve grantsmanship

Support the process of requesting matching funds

Current Initiative: Support for Instrumentation Grant Submissions

ORT is hosting an **Instrumentation Grant Panel Discussion** on **October 12, 2023**, to discuss NSF MRI, NIH S10, DoD DURIP, and NCBC IIG grant mechanisms

Expert panel of core directors will discuss grant mechanisms during a roundtable:

- Dr. Pablo Ariel (Microscopy Services Laboratory; NIH S10)
- Dr. Brandie Ehrmann (Dept. of Chemistry Mass Spectrometry; DoD DURIP)
- Dr. Chun Hsing (Josh) Chen (Dept. of Chemistry X-Ray Crystallography; NSF MRI)
- Dr. Ashutosh Tripathy (Macromolecular Interactions Facility; NCBC)
- Dr. Paul Maddox (NIH S10 study section member)

RSVP to kara_clissold@med.unc.edu

Current Initiative: Measuring the Impact of Core Facilities

Financial

- New reporting tools and dashboards being developed by RCD team

Educational

- Student dissertations and theses supported by core facilities

Scientific

- Journal articles and grants supported by expertise and instrumentation housed within core facilities

Acknowledgment Tracking for Core Facilities

Why this matters:

- Demonstrates the return on investment in cores
- Centers need to report publications supported by affiliated cores
- *“Knowledge is power”* – OVCR, OoR, departments, and cores should know the impact that cores have on research and education at UNC

Current methods insufficient:

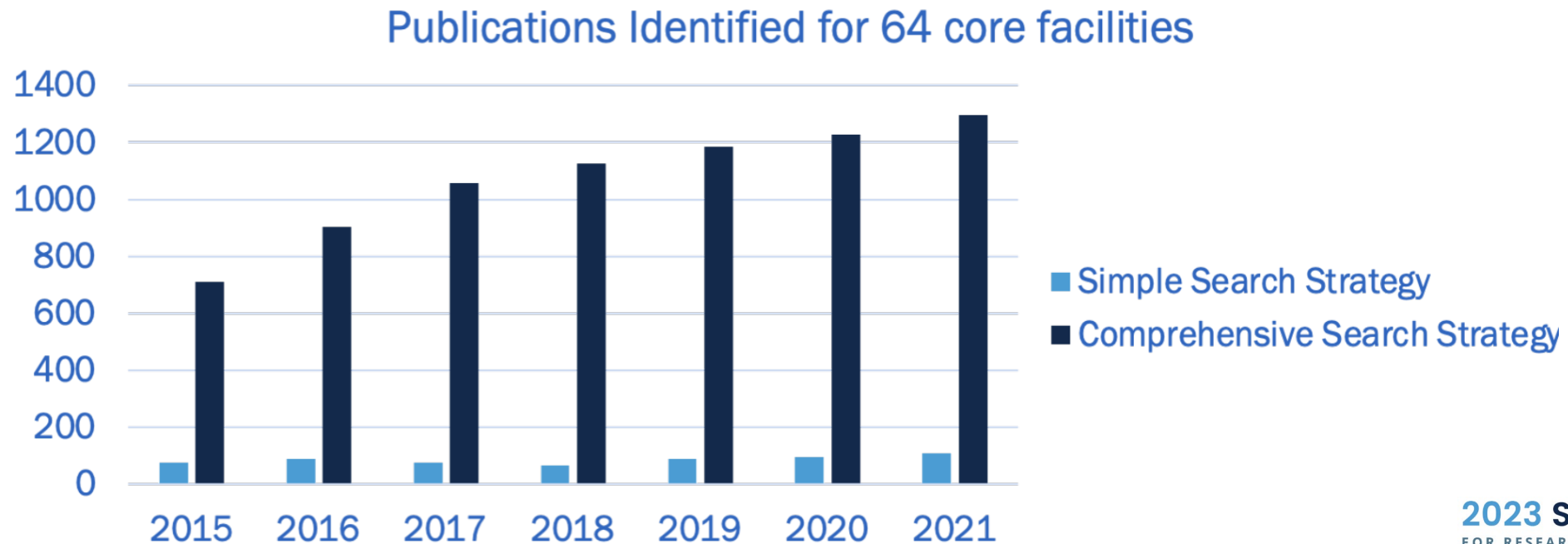
- Relying on PI self-reports
- A static simple PubMed search string method

A universal challenge:

- Failure to include specific acknowledgment of cores that generated data for manuscripts
- Inconsistencies in acknowledgment statements (variations in core name, core director names, grants, equipment, etc.)

Acknowledgement Tracking for Core Facilities

Comprehensive search strategies (expanded lists of key words for each core) are dramatically more effective at accurately identifying acknowledgments affiliated with core facilities



Acknowledgment Tracking for Core Facilities



Searches for **64 core facilities** yielded **2,453 acknowledgments** of those cores in student dissertations and theses at **190 institutions** around the world



87% of acknowledgments were from **students** receiving a degree from **UNC-Chapel Hill**



88% of acknowledgments were in **PhD** (or international equivalent) dissertations



17% of dissertations or theses acknowledged **more than one UNC-Chapel Hill core facility**

New ORT Initiatives



A reporting tool for acknowledgment tracking specifically for core facilities at UNC Chapel Hill



Travel awards for core facility directors and staff to attend scientific conferences



Peer mentorship program for core directors

Questions?

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