Research Core Manager Summit
October 17, 2018   Memorial Union Tripp Commons

Welcome!

Summit Goals
The goals of the gathering are to: (1) provide a networking platform for core managers to meet one another and explore the diversity and commonalities of research services on campus; (2) discuss challenges and share solutions for areas of concern; (3) provide foundational ideas and an organization for a spring campus-outreach event.

Agenda
8:30 – 9:00   Check-in and refreshments
9:00 – 9:10   Introduction to Summit and Campus Cores
9:10 – 9:30   Table Topics Round 1
9:30 – 9:50   Table Topics Round 2
9:50 – 10:10  Table Topics Round 3
10:10 – 10:30 Table Topics Round 4
10:30 – 11:00 Report Out
11:00 – 12:00 Informal networking

Table topics:
› Setting Rates
› Marketing and Outreach
› Reservations and Scheduling
› Staff Professional Development
› Managing Research Data
› Working with External Customers
› Starting & Ending Services
› Wildcard

Office of Campus Research Cores  https://research.wisc.edu/research-cores/
Directory of Resources for Researchers  https://resources.research.wisc.edu/
Office of the Vice Chancellor for Research and Graduate Education  https://research.wisc.edu/
OVERALL IMPRESSIONS (feedback from attendees)

- The summit was great! I met a lot of key people who are facing the same issues as I am.
- I had no idea there were so many cores on campus. I look forward to a lot more of these events.
- This was the most collegial group of people I’ve met at a conference like this. Everyone was so helpful.
- It seems like we have a lot to learn from each other, and that everyone is doing things a little differently. It’s nice to get ideas of how you can do things in a variety of ways.
- I didn’t know that the way I was [doing something] wasn’t allowed. No one told me anything, but it was informative to hear about compliance and regulations from more experienced managers.
- Let’s have more get-togethers. Maybe even once a month, or at least quarterly. It would be great to have some invited speakers from RSP, Accounting, Property Control and other groups so we can learn more and also teach them about what we are trying to do.

Working with External Customers (facilitated by Laila Robbins, OVCRGE Project Manager)

- Agreements are very time-consuming
  - Fee-for-Service agreements, Material Transfer Agreements (MTA) Non-Disclosure Agreements (NDA)
  - all are very time-consuming to push through various compliance offices on campus
  - many cores have simply given up and go without these, especially for local customers
  - out-of-country partners can be very difficult, what about non-payment?

Suggestions
- can there be a boilerplate agreement that all or most cores could use?
- can we invite UW Legal folks, Office of Industrial Partnerships to talk to us?
- do they know how hard it is? we are losing important business and partners, they just walk away

ACTION ITEM
Plan regular core manager meetings for education and networking. With food.

ACTION ITEM
Invite UW Legal and OIP to meeting with core managers for shared education.
Starting / Ending Services (facilitated by Dagna Sheerar, UWCCC Flow Lab)

ACTION ITEM
Develop tools and resources to support managers in feasibility studies and business plans.

When to end a service
- when instrument usage stops covering costs
- not worth it to subsidize with heavily used instruments
- if service is duplicative and redundancy is not required

Disposition of instruments
- SWAP
- Property transfer to a user
- “sell to user”
- create bench space

Starting new service
- ideal is to do a feasibility study but there are associated costs (time, effort, attention)
- instrument demonstrations are useful
- there is a risk if users request an instrument but the equipment has a poor evaluation or performance record and the core staff cannot recommend it

Rigor and reproducibility on infrequently used instrumentation
- increasingly a concern for researchers and core staff
- consult users about experimental goals and expectations

Questions to consider (no clear answers here)
- How to better sell an existing service?
- Time from idea/need to fruition can be 1-2 years. How to make that shorter?
- Assessing duplicate services on campus?
- Measuring level of interest among potential customers?
- How do you maintain cutting edge and balance that with standard services, or older outdated services that are still moderate to heavily used?
- Ending service contracts... How does that affect the services you are providing?

Suggestions
- create mechanism for startup funds for newer services to support innovation and new instrumentation?
- Leverage usage and financial data to assess services to add or end
- establishing level of expertise of core staff and use consultation as marketing strategy / added value
- work with core Advisory Board, Department, School, Institution to manage facility, services, and rates
- employ strategic planning, including a Market Prospectus that considers the research “market” globally rather than reacting to a handful of researchers. It may start with requests or demands from researchers, but the effort to assess the data is important.
Research Data (facilitated by Sarah Stevens, Data Science Hub)

**ACTION ITEM**
Continue partnering with campus resources like DoIT, Data Science Hub, Research Data Services to understand data management options for cores. Develop templates for core data policies.

Lack of clarity about data policy
- are there campus guidelines?
- does each core determine its own strategy?
- cores do not have capability to store data indefinitely
- many cores assume that it is PI responsibility to store data after delivery from core
- however, software owned by the core might be critical to analysis, what to do in that case?
- is retention of software versions also required?
- how does campus support this?

UW BOX
- Box to FTP is used by some cores by special arrangement
- typical way to upload to Box is too slow for most core applications
- but in theory, at the present time, storage size is unlimited
- great for small projects but not for large workflows

Best practice recommendations
- develop a clear statement of data practices and retention
- make PIs aware of the data retention policy of the core via contract or invoice
- remind PIs of data delivery and destruction prior to removal
- back up the short-term data in two places (one off site)
- build the costs of data storage and management into the core rates

Concerns to consider
- computers built inside instruments can be very problematic – heat up and fail often – plan for it
- many journals are now requiring raw data uploads, and PIs may return to core for these data
- metadata tagging of data may not be the same for the PI and the core – can you find the data?
- cores would like a dedicated contact person – “I’m a microbiologist. What do I know about archiving data?”
Setting Rates (facilitated by Elle Grevstad, Biochemistry Optical Core)

ACTION ITEM
Provide tools and resources from First Financials workshop to broad core audience.

Rate-setting is a substantial concern for many cores
- how can we set rates in a competitive environment?
- do I have to match the rates of other similar cores? what if it costs more than that?
- rates that are high drive PIs to buy own equipment in start-up or grants
- advisory boards that are also heavy core users are conflicted about raising rates

Consistent rate
- rates must be consistent for internal users, although a center or group can pay part of the cost
- cores cannot charge one set of campus users more than others (i.e. on dept by dept basis)
- what are mechanisms when a department or center is funding the core?
- how to set rates for other university users (not in Wisconsin) is confusing

Managing conflict about rates
- make the value of the core clear – expertise, quality assurance, custom work, etc
- include value-added items or services if any capacity exists
- be clear about rate increases well in advance
- use data and budgets to explain role of additional support – unlikely that cores can be full recovery

Professional Development (facilitated by Natasha Kussulke, OVCGRGE Communication Manager)

ACTION ITEM
Compile professional development opportunities. Explore core staff-specific options.

Core staff are actively seeking professional development opportunities
- project management courses in the Business School are good but expensive
- Academic Staff Professional Development grant program is difficult, not recommended
- Lynda.com has some relevant content (like web development), UW-Madison has subscription
- Women in Leadership coffee sessions are very helpful – can these provide a model?
- some cores do annual retreats with staff development components
**Communication & Marketing** (facilitated by Natasha Kussulke, OVCGRGE Communication Manager)

**ACTION ITEM**
Explore options for a shared marketing resource, especially for websites.

Marketing and outreach is difficult
- core staff lack the time and budget to do marketing and outreach to campus or externals
- users are already getting too many emails and newsletters
- the value of social media like Twitter and Facebook is unknown, and these are time-consuming
- tours don’t work

Suggestions
- could there be a shared communications and marketing resource?
- like a person to advise on website design for all cores> or shared solutions?
- maybe target graduate students and post-docs – they are ones bringing new approaches to labs
- use building video monitors
- tap in to existing newsletters and events
- try a department meeting “trailer” – brief video about core or simple short introductory talk
- events like BadgerConnect (at UWCCC in May 2018) are very helpful
- LinkedIn is an important tool – create an entry for the core, and ask people to associate with it
- how about a shared core user list? can we provide referrals to other cores?

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**Service Contracts** (facilitated by Jerry Hunter, Engineering Shared Facilities)

**ACTION ITEM**
Determine feasibility of centralized negotiations. Collect information on third-party options.

Service contracts are a large part of core expenses
- largest expense after salary
- can be 30 – 50% of core expenditures
- often cannot be sustained after the initial 2- or 3-year period
- going without becomes a gamble
- Service Underwriters and REMI are being used, some are satisfied, others are wary
- Isabelle collected data on initial experiences of cores with REMI and can share on request

Suggestions
- bundle several contracts together to save money – cores are all negotiating on their own
- consider if we could pay for an outside contractor to be dedicated to UW, or train in house?