Introducing Andy Ott, Director of Core Facilities

- Andy has directed IMSERC for more than 10 years
- Served on the core facilities advisory board since 2013
- Andy will split his time between IMSERC and Office for Research for the next 3 years and will take on the following responsibilities:
  - Manage bi-annual OR Equipment Funding Program (including ReLODE)
  - Annual reports evaluation, feedback and awards
  - Oversee Program Review (cores to be reviewed next summer will be selected this Spring)
  - Quarterly Advisory Board meetings

Both Phil and Andy will work together on the following:

- Oversight of CFA staff (Aaron Rosen / Sasha Mechetner)
- Oversight of the Research Shop and Cryogenics facility

Phil will continue to oversee the following:

- Open Access Initiative (annual meeting)
- Kellogg Course in Core Leadership
- Coordinating external instrumentation grants
- NUCATS pilot program

Updates and Additions to the Facility Voucher Program

- Discussions on expanding this program began 6-9 months ago
- AVP's will be deciding whether the VPR will be able to expand funding for the program from other cost-sharing sources (e.g. OR matches departmental/school cost sharing on instrumentation grants when required)

Financial Data Metrics Review

- 90-Day Journal Report
  - Journaling on a sponsored project 90 days after the fulfillment date requires filling out a 90-day form to ASRSP
    - If not a sponsored project, keep this paperwork on file
  - Charging sponsored projects in a timely fashion helps department administrators accurately view the current balance of the grant
  - Please reconcile external orders on a regular basis: this is a help for tax reporting purposes and for the core to track outstanding payments

- External Revenue Data and Analysis
  - FY2016 numbers are comparable to past year
  - $2.7M in external revenue in FY16
  - $1.5M related to cores
  - Open Access Initiative brought in close to $150K
    - UofC spending is down, UIC spending is up
Of the cores serving commercial users, 9% of revenue is commercial (not 9% of activity, since external rates are higher)

- **FY16 Core Facility profit/loss on commercial users**
  - Revenue on external projects was analyzed
  - External projects that bring in between $0 and $2500 are beneficial for core revenue
  - When building the cost study, employ previous years’ external utilization data to calculate the figure for the coming year
  - Predicting external usage correctly will minimize loss and allow internal users to benefit
  - Note that cost studies can be adjusted throughout the year to accurately reflect your rates

- **Equipment Inventory Feedback**
  - Evanston cores provided information on longevity of their capital equipment
  - Average annual cost of replacing capital equipment is $1.5M - $2M, based on data provided in Evanston
    - Data gathered so far does not account for the means in which capital equipment will be replaced/updated in the future
  - The Office for Research (OR) will include this data in the proposal to the Provost later this month, putting Core Facilities’ needs as a priority for OR and the University. The aims are to
    - Expand ReLODE program
    - Expand funding for internal equipment grant program
    - Increase budget for cores to help cores grow (not only sustain)
  - The total request to the Provost will be approximately $6.5M

- **OR Operating Support Program**
  - OR will now accept two new activities in requests for operating support in FY18 and beyond:
    - Satellite expansion to another campus
    - Collaboration on services with another core
  - Details: [https://facilities.research.northwestern.edu/financial#funding](https://facilities.research.northwestern.edu/financial#funding)

- **OR Core Facilities Website**
  - Core Facilities website will be rebranded to Global Marketing standards
  - All data on core pages will be transferred over to the new site
  - There will be a content block for 2-3 days
    - We will announce the date and times for this so you can prepare
  - Let us know if you have any suggestions for the site