

Should you be a Core Facility?

- Do you provide a good or service to investigators?
- Do you want to charge a fee for the good or service you provide?
- Do you spend more than \$50,000 a year on expenses (salaries, supplies, etc.) in order to provide the good or service?
- Do you provide goods or services to more than five grants?
- Are you the only one or one of a small few who provides this good or service?

If you answered “yes” to any of these questions, contact the Manager of Research Core Facilities at your institution.

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How to Establish a New Core Facility

- Contact the Manager for Research Core Facilities (Manager) at your institution to discuss whether the goods or services you want to provide fit the definition of a core facility (see the Core Facility Policy for definitions).
- Obtain written/email approval from your Department Chief and forward to or CC the Manager.
- Obtain a copy of the Core Facility Business Plan Template, the Rate Analysis and Budget Template and the Checklist of Required Information from the Manager or the forms page of the Partners Research Core Facilities website <http://www.partners.org/researchcores/forms.html>.
- Complete the business plan and rate analysis (with assistance from the Manager, if necessary).
- Send business plan, rate analysis and budget to the Manager for review.
- Receive feedback from Manager and update as necessary.
- The Manager will send the final version of the business plan, rate analysis and budget to the Senior Vice President for Research at your institution for final approval.
- Upon approval, the Manager will send you a copy of the new fund application.
- Obtain appropriate signatures to complete the fund application and provide an eligible guarantor account number which will be used to cover un-resolvable deficits.
- Return the completed fund application to the Manager.
- The application will be processed and you will receive an email from “PHS Research eSubmissions” letting you know your fund number and that it is active.

Checklist of Information Required to Establish a New Core Facility

- To complete the business plan you will need:
 - Rationale and Mission of the core
 - Determine who will be the Core Director; Core Administrator; Core Staff and members of the Core Advisory Committee.
 - Detailed explanation of services to be provided and the costs associated with each
 - Location of the core – Building, room, square footage
 - Equipment – create a list including how each piece was funded, its acquisition date and asset ID#
 - Core standard operating procedures – guidelines users must follow in order to access the core such as, hours of operation, equipment handling, cancellation policy, etc.
 - Anticipated usage – perform a survey if necessary
 - Details of local competitors – create a table comparing other providers of your core’s service(s), including institution and price
 - Details of what needs to be done in order to open the core
 - Create marketing plan
 - Develop billing and collection process
 - Define review process and mechanisms for obtaining feedback
 - Description of future needs of the core – new services you want to provide, new equipment that might be needed, etc.
- To complete the rate analysis and budget you will need:
 - Salaries and percent effort of individuals who will working for the core
 - Listing of all supplies, service contracts, etc. tied to the service being provided and how much was spent in a prior period of time
 - Listing of any departmental or institutional subsidies or seed funding that the core expects to receive
- Guarantor Account Number – This is a cost center that may be used to cover core deficits. Please note, this fund will never be used without a discussion with the core director and administrator. Proof must be provided showing that the guarantor account has sufficient funds to cover a deficit, that is, 10% of the cores annual operating expenses.

Establishing a Core Facility Process

