
UPCI Shared Resource Annual Report

The Annual Report should be received annually by December 15th (5:00 PM). The report should be sent as a PDF file to Dr. Maryann Donovan, Associate Director for Research Administration (donoma2@upmc.edu).

Note: When answering questions about the "past year," please use previous calendar year (not fiscal year). For the budget, refer to fiscal year.

The following information should be included:

1. **Operations** (0.5 page limit)
 - *History & Mission* - provide a brief history of your resource including the year it was created and briefly describe its mission
 - *Management* - describe the responsibilities of each person involved in the daily management of the resource. Include the names and academic affiliations of the people in these positions; describe any unique expertise that enables them to fulfill these roles; list the per cent effort of each person noting whether it involves paid or contributed service; describe any change in the positions, responsibilities or per cent effort in the past year.
 - *Achievements* - for each *faculty* member of the management team, provide a description of promotions, honors and awards during the past calendar year that are directly related to the resource (put in Appendix)
 - *Oversight* - provide the names and academic affiliations of the Chairperson and members of the Faculty Advisory Committee (Please Note: directors and managers are *ex officio* members of the Committee who may organize, but not lead, the meetings); describe any change in these positions or responsibilities during the past year; list the dates of each meeting of the Committee during the past year and provide the minutes of these meetings in the Appendix
2. **Faculty Resource Director** (0.5 page limit)
 - *Qualifications and Responsibilities* - describe the expertise and responsibilities of the Faculty Resource Director
3. **Research and Technical Staff** (0.5 page limit)
 - *Qualifications and Responsibilities* - describe the responsibilities of each research or technical *staff* person (non-faculty) involved in the daily operation of the resource (Manager, Research Associate, Research Technician, Research Specialist, etc.); provide the name, a brief job description, and qualifications of the people in these positions (full-time and part-time); describe any unique expertise that enables them to fulfill these roles; describe any change in these positions or responsibilities during the past year
 - *Professional Development & Achievements* - provide a brief description of noteworthy accomplishments of the staff during the past year; these may include, but are not limited to, development of a new technique in the resource, new skills or mastery of new

- techniques, attendance at seminars, courses, workshops, national or international meetings
- *Presentations at National and International Conferences* - describe presentations at national and international conferences by staff during the past year (title of presentation, conference name, location, dates); make special note of any conference dedicated specifically to core resource issues (e.g., ABRF, GLIIFCA, ALMA, etc.)
4. **Resource Publications and Grants** (put in Appendix)
- *Publications* - list all publications by members of the resource during the past year
 - *Grants* - list all grants submitted by resource personnel during the past year along with funding status
5. **Resource Management** (1 page limit)
- *Instrument-Based Facilities* - provide a brief description of each instrument and service provided by the resource; create a Table with the following information: name of each instrument, source of funding, date acquired, cost for usage, number of users in past year
 - *Service-Based Facilities* - provide a brief description of the services and products provided by the resource; create a Table with the following information: name of each service and product, date initiated, cost, service hours in past year, products sold in the past year
 - *New Instruments and Services* - describe any new instruments or services that were added to the resource in the past year and how they were funded; explain how they will be incorporated into the management plan of the resource
 - *Grant Applications for New Equipment* - describe any grant application for new instruments during the past year (granting agency, program, submission date, review score) and the outcome of the application process; if not funded, then explain how you plan to respond to the reviewers; include a copy of the Summary Statement from the Review Panel in the Appendix
 - *Space Management* - describe where the instruments and services are located relative to the offices of the Manager and staff (campus, buildings, rooms); a floor plan with identification of resource space is required for facilities that extend beyond a single room; explain any space issues that interfere with the efficient operation of the resource; describe any use of space off campus and why this is necessary
 - *Budget* - provide a budget for the past fiscal year, the current year and the anticipated budget for next year (put in Appendix); if there is a disparity between expenses and income (net deficit or net income), then explain how this disparity will be remedied in next year's budget
6. **Customer Satisfaction Survey** (0.25 page limit)
- *User Survey* - include the results of the previous year's User Survey (in Appendix) and address any problems raised by your customers
7. **Customer Base** (put in Appendix)

- *Customer Data* – include a multi-tab spreadsheet list customers by services used, by department, and by principle investigator.
 - *Change in Customer Base* - compare the size of your user base with the previous year; identify major trends in the use of any equipment or service indicating a potential shift in the need for that instrument or service; provide an analysis of how such a trend will impact long-term support for the instrument or service and how this might be remedied
8. **Customer Publications and Grants** (put in Appendix)
- *Publications* - list all publications of customers that involved data generated in your resource; list customers by school and department
 - *Grants* - to the extent possible, list all grants submitted by customers that involved data generated in your resource (if extensive, add to Appendix); list customers by school and department
9. **Describe Scientific Contributions** (0.5 page limit)
- Select a few examples that illustrate how the resource has facilitated high impact science; if relevant, describe how your shared resource is serving cross-disciplinary research or team science and/or translational research. Discuss if your shared resource provides a unique service to other cancer centers.
10. **Educational Activities** (0.25 page limit)
- *Graduate and Undergraduate Courses* - describe any involvement of your resource in graduate and undergraduate courses (include course title, instructor, quarter in which it was taught, number of students); explain how this contributes to the mission of your resource
 - *Workshops* - describe any workshops or tutorials sponsored by your resource that were aimed at educating users of your resource; explain how this contributes to the mission of your resource
11. **Outreach Activities** (0.25 page limit)
- *K-12 Education; Commercial Customers; and Pilot Testing of New Equipment or Services* - describe any testing of new equipment or services on loan in your resource and whether this resulted in pilot data for grant applications; list the grant applications (PI, funding agency, etc); explain how this contributes to the mission of your resource
12. **Communication of Services** (0.25 page limit)
- Describe the steps you have taken over the past year to advertise your services and increase usage.
13. **Self-Assessment** (1 page limit) - briefly describe the strengths, weaknesses, opportunities and threats (challenges) to the resource and how they will be addressed in the coming year
14. **Signatures** - are required for all members of the Faculty Advisory Committee indicating that each has read and approved the Annual Report; preparation of the Annual Report is an opportune time to have the Committee meet to discuss the issues raised in the Report and to provide input on decisions that need to be addressed.

15. **Appendices**