

Core Director's Meeting

January 2024



SCHOOL OF
MEDICINE

UNC Research Data Management Core

Jonathan Crabtree, Ph.D.

RDMC Director



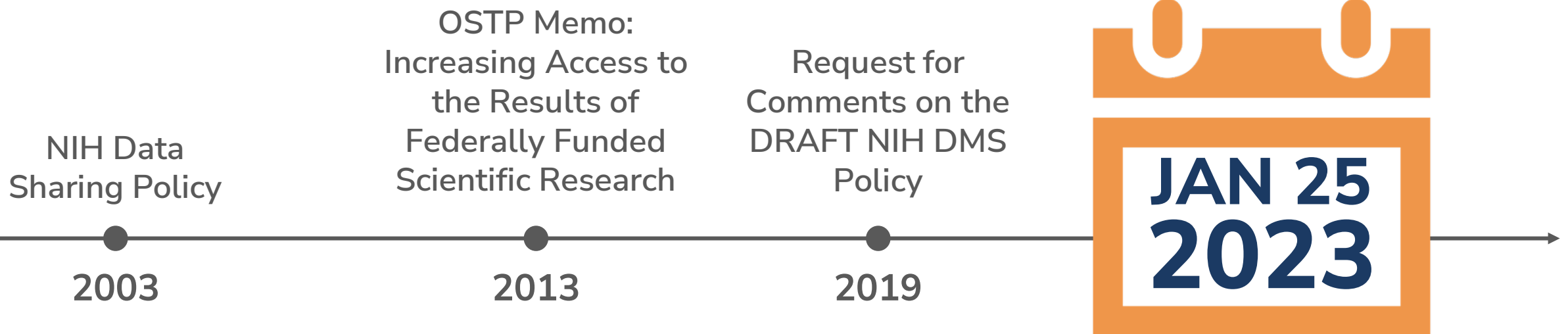
THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL



RESEARCH
Data Management Core

NIH Data Management and Sharing Policy

NIH has issued the Data Management and Sharing (DMS) Policy to **promote the sharing of scientific data**. Sharing scientific data accelerates biomedical research discovery, in part, by enabling validation of research results, providing accessibility to high-value datasets, and promoting data reuse for future research studies.




NIH Data Management and Sharing Policy...



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF SCIENCE AND TECHNOLOGY POLICY
WASHINGTON, D.C. 20502

August 25, 2022

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

FROM: Dr. Alondra Nelson 
Deputy Assistant to the President and Deputy Director for Science and Society
Performing the Duties of Director
Office of Science and Technology Policy (OSTP)

SUBJECT: Ensuring Free, Immediate, and Equitable Access to Federally Funded Research

This memorandum provides policy guidance to federal agencies with research and development expenditures on updating their public access policies. In accordance with this memorandum, OSTP recommends that federal agencies, to the extent consistent with applicable law:

1. Update their public access policies as soon as possible, and no later than December 31st, 2025, to make publications and their supporting data resulting from federally funded research publicly accessible without an embargo on their free and public release;
2. Establish transparent procedures that ensure scientific and research integrity is maintained in public access policies; and,
3. Coordinate with OSTP to ensure equitable delivery of federally funded research results and data.

1. Background and Policy Principles

Since February 2013, federal public access policy has been guided by the *Memorandum on Increasing Access to the Results of Federally Funded Research* (2013 Memorandum).¹ Issued by the White House Office of Science and Technology Policy (OSTP), the 2013 Memorandum directed all federal departments and agencies (agencies) with more than \$100 million in annual research and development expenditures to develop a plan to support increased public access to the results of federally funded research, with specific focus on access to scholarly publications and digital data resulting from such research.

Nearly ten years later, every federal agency subject to the 2013 Memorandum has developed and implemented a public access policy in accordance with its guidance.² As a result, the American public has experienced great benefits: more than 8 million scholarly publications have become accessible to the public. Over 3 million people read these articles for free every day. The 2013 federal public access policy set the stage for a paradigm shift away from research silos and

...OSTP recommends that federal agencies...update their public access policies as soon as possible, and no later than December 31st, 2025, to make publications and their supporting data resulting from federally funded research publicly accessible without an embargo on their free and public release...



<https://www.whitehouse.gov/wp-content/uploads/2022/08/08-2022-OSTP-Public-Access-Memo.pdf>

Establishing a New DMS Support Unit at UNC

UNC Research Data Management Core (RDMC)

- Funded and supported by the OVCR and new RDMC Fee
- Tasked with coordinating campus data management infrastructure, training, policy, and compliance
- Focused on collaborative approaches that include alignment, integration, and coordination

Funding Research Data Management

- New RDMC Fee implemented in November 2023
- Applies to most sponsored research projects (excludes technical assistance, training, etc)
- 0.38% of Modified Total Direct Cost (MTDC) expenditures for that month
- The MTDC is not included in the MTDC calculation, so fee is not circular

Funding Research Data Management

- Why not fund this from F&A?
- NIH does not have any ability to affect changes to the F&A model
- The current F&A model was created in 1991 by Congress; Only Congress can revise the model
- Supports Facilities & Administrative Costs
- No matter a university's rate, only 26 points of the total can be recovered for Administrative Costs

Funding Research Data Management

- What has changed since 1991? A Lot!
 - Conflict of Interest
 - Export Compliance
 - Securing Materials / Select Agents
 - Ethics & Transparency Requirement
 - Sub Recipient Monitoring
 - Science & Security / Global Program Restrictions
 - Data Management
- Most of these represented unfunded mandates
- NIH knew that it could not force another unfunded mandate
- Specifically permitted to charge direct costs for data management

UNC Research Data Management Core

Data Management and Sharing Policy Compliance Strategy

Support and promote standards and best practices for research data management and sharing



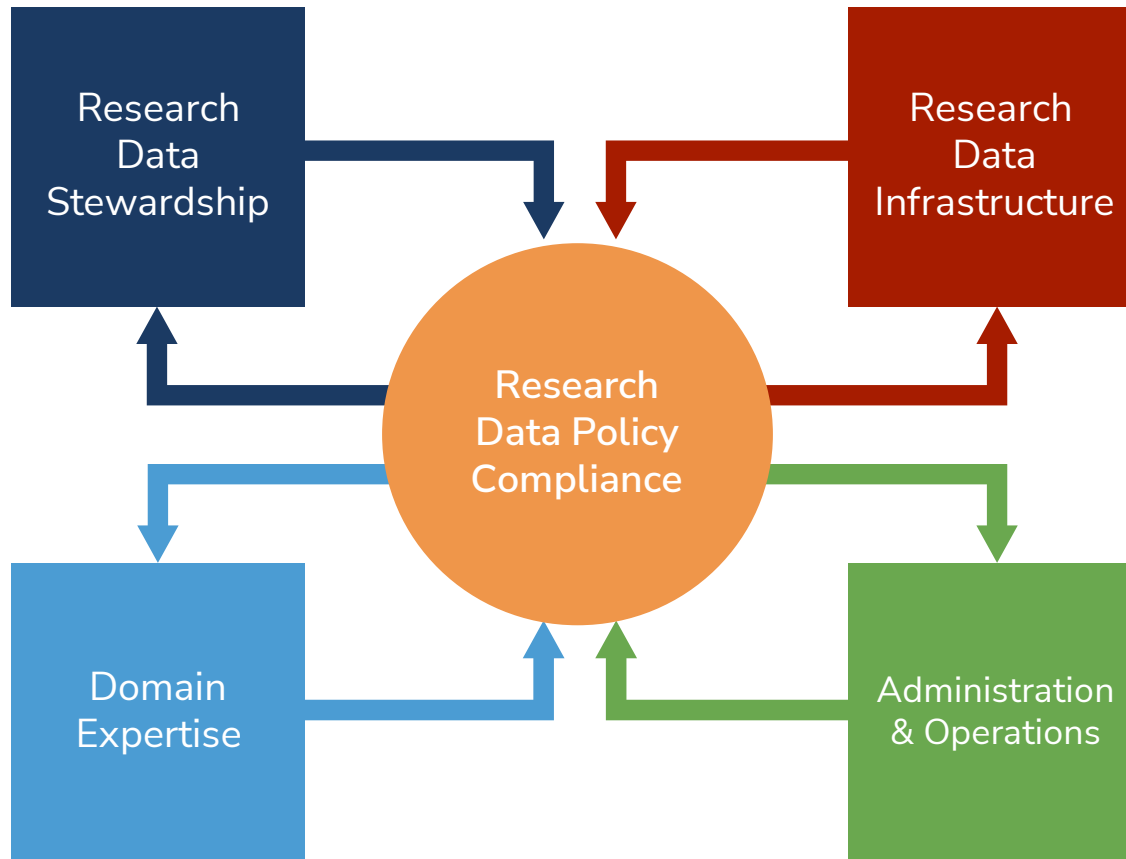
Coordinate across IT service providers to develop, maintain, and validate research data information systems



Align research data management and sharing strategies with disciplinary standards and norms



Perform administrative functions that support research data management strategies and initiatives



UNC Research Data Management Core

Factors Informing the RDMC Strategy

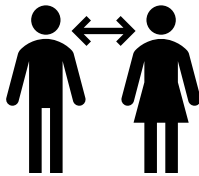
- Data stewardship
- Research lifecycle approach to data management support
- Federated IT approach by linking and integrating systems
- Accelerate availability of new technologies that fill identified gaps
- Policies and support that empower researchers to adopt data management and sharing best practices
- Need for tracking systems to enable automated compliance reporting

UNC Research Data Management Core

RDMC Services and Activities



Education and training. RDMC will offer workshops and guidance materials on DMS policy requirements, writing a DMS plan, and DMS best practices.



Consultation. RDMC staff will provide guidance on appropriate strategies for research data management and sharing.



Policy compliance. RDMC staff will review and audit DMS plans to ensure policy compliance and grant competitiveness.



Infrastructure. RDMC will coordinate, build, and maintain infrastructure to support research data management and sharing across the research lifecycle.

UNC Research Data Management Core

RDMC Services and Activities

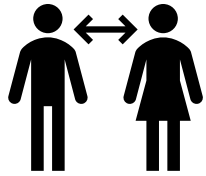


Education and training. RDMC will offer workshops and guidance materials on DMS policy requirements, writing a DMS plan, and DMS best practices.

- Data curation training for project teams and investigators
- Training for data management and sharing policy requirements
- Training for existing campus research data platforms and systems
- Open, continuing education program for data management and sharing best practices based on existing and emerging standards
- Training and continuing education program for unit-embedded data stewards and domain experts across campus
- Campus-wide data management curriculum development program for integration into graduate and undergraduate training

UNC Research Data Management Core

RDMC Services and Activities



Consultation. RDMC staff will provide guidance on appropriate strategies for research data management and sharing.

- On-demand support for DMS plan development and implementation using the DMPTool
- Assistance with identifying appropriate data repositories that meet funder requirements for long-term data management and sharing
- Access to critical tools and infrastructure to support data management across the research lifecycle
- Referral and coordination of research data support units and experts across campus to maximize value of existing resources and minimize costly redundancies
- Identification of data management challenges and working to design collaborative, intra-institutional solutions to address these challenges

UNC Research Data Management Core

RDMC Services and Activities



Policy compliance. RDMC staff will review and audit data management and sharing (DMS) plans to ensure policy compliance and grant competitiveness

- Development of pipeline for data management and sharing plan review, implementation and audit
- Establishment of ongoing tracking and audit mechanism for data management and sharing plan implementation
- Pre-review of DMS plans to be submitted as part of grant funding applications
- Ongoing monitoring and auditing of DMS plan implementation to ensure compliance with funder policies

UNC Research Data Management Core

RDMC Services and Activities



Infrastructure. RDMC will coordinate, build, and maintain infrastructure to support research data management and sharing across the research lifecycle.

- Planning, scoping, and implementation of a campus-wide research data management ecosystem that includes integrations among campus data sources, stores, and tools
- Development of the RDM web portal that provides a single access point to RDM resources, including a repository/storage finder
- Support and maintenance for UNC Dataverse, which features the NIH-defined desirable characteristics for data repositories
- Archival storage of up to 2TB of data per research project
- Support and maintenance for validated secure clinical data repository platform including workflows for ingest and retrieval of data subject to 21 CFR part 11
- Management and customization of DMPTool to ease the burden of writing DMS plans that meet funder policy requirements

UNC Research Data Management Core

Broader Impacts

- **Establish a high standard for faculty excellence** in research data management and sharing practices
- **Prepare the next generation of researchers** through research data management training as part of graduate and undergraduate curriculum development
- **Enhance and sustain the value of UNC research data assets** by applying FAIR standards to scientific outputs
- **Ensure access to a campus-wide research data ecosystem** to support research data management and access across the research lifecycle
- **Promote the competitiveness of UNC's \$1 billion enterprise** by increasing the likelihood of success of sponsored programs

Impact on existing UNC Cores

- RDMC is not designed to replace any existing services.
- RDMC is a coordinating and facilitating effort designed to enhance the research process and promote compliance.
- RDMC interested in understanding the gaps in the research data workflows.
- RDMC seeks to promote data sharing and archiving not only for compliance's sake but also to ensure access to UNC valuable data.

How can RDMC help your groups?

- Where are your pain points with the emerging policies?
- Where are resources needed?
- ??

Thank You



RESEARCH

Data Management
Core



<https://researchdata.unc.edu>



Jonathan_Crabtree@unc.edu



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RESEARCH
Data Management Core



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Office of Research Technologies

Updates for Core Directors

ABRF Annual Meeting 2024

Registration is open!



**ABRF 2024
ANNUAL
MEETING**

Preparing today's cores
for tomorrow's needs

ABRF
*Research • Technology
Communication • Education*

**35
YEARS**

MINNEAPOLIS, MN
APRIL 21-24, 2024

The banner features a central graphic of a white circle containing a red cherry on a white spoon. The circle is surrounded by a blue silhouette of a city skyline. The ABRF logo is positioned above the circle, and the '35 YEARS' text is below it.

Let Chris or Kara know if you are attending.

ABRF: Technical Reviewers

- ABRF Committee on Core Rigor and Reproducibility (CCoRRe) has initiated an agreement with AACR journals to provide technical reviewers. Core directors and staff are encouraged to volunteer. Genomics expertise is the initial focus
 - Improves rigor and reproducibility
 - Provides career development opportunity
 - Provides an advance look at new technologies
- There will be a session at the ABRF Annual Meeting discussing this initiative
- If you are interested in volunteering, please let Chris know

Spatial Technology Discussions

- ORT has facilitated two meetings focused on a spatial 'omics strategy for UNC Chapel Hill
- November 2023 - met with core directors and super-users to discuss current state of spatial biology on campus and conducted a gap analysis
- December 2023 - met with a small group of core directors to discuss specific, targeted action items
- There will be additional follow up and likely an open forum inviting anyone interested in spatial biology

SOM Voucher Program Update

- Thank you to the core directors who met with customers developing applications for the voucher program
- \$282,303 was allocated to 30 vouchers (out of 82 submitted) for use in 26 SOM core facilities
- Funds should be spent by June 30, 2024
- Awardees will be asked to provide outcomes of the projects (grants, papers, theses, etc.) after 12 months
- CFAC intends to run this program again in Fall FY25

CFAC Spring RFA and Instrumentation Funding

- Opened this week and closes February 16, 2024. Awards will be decided mid-March
- Applications can be for method development, equipment or general core needs
 - Funds must be spent by June 30, 2024 – please plan accordingly
- *Requests focused on “Spatial ‘Omics” technologies encouraged, especially multi-core proposals or method development benefitting a broad customer base.*
- If you plan to submit an S10 in June and you intend to request matching funds from CFAC please put in that request **during this RFA cycle** so we can budget accordingly.
- Per Purchasing, UNC is not currently permitting equipment leases

Travel Awards

- CFAC is funding two sets of travel awards this calendar year for cores who are **open recharge core facilities (OSP-driven rate development)**
- First round of funding applications due **1/31/24**. Second round will be open for submission during July 2024.
- Up to 5 awards of up to \$1,000 each available for funding in each cycle

Accounts Receivable (A/R) Reports:

- Accounts Receivable – money owed by customers for your core services, classified as an asset, considered delinquent after 60 days
- Ben Wright and Kara Clissold are currently reviewing A/R for all cores *that utilize iLab* for billing and may reach out to you (if we haven't already) to discuss any outstanding A/R you may have
 - A/R for cores who bill through Infoporte will be reviewed this spring but if you have questions now, please reach out.
- Please mark invoices as paid in iLab once payment is received. If you are unsure how to do this, contact Kara, Ben, or Michael Akridge to assist you with the process. It is a straightforward process and ensures accuracy in our A/R data.

Accounts Receivable: Resolving Payments

- If you have customers who say payment was remitted and you suspect payment may have ended up at a different unit on campus:
 - Request the billing address, check number, total dollar amount, and any other identifying information from the customer
 - Ben and Kara can both assist in inquiring with different units if the payment appeared there
- If you have a customer who has not paid within 90 days of invoicing:
 - We encourage you to stop working on any other projects, beginning new projects, or providing final data until previous invoices are paid
 - Kara and Ben can assist in identifying the best way to escalate either within the customer's organization or at UNC Chapel Hill

Contact Us

- Chris Gregory: christopher_gregory@med.unc.edu
- Kara Clissold: kara_Clissold@med.unc.edu
- ORT/CFAC: corefacilities@med.unc.edu



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Accounts Receivable – Tableau Report for iLab

If you or your business staff are not marking external invoices as “Paid” in iLab, please let us know

- Tableau A/R Report for iLab coming soon
 - Cores can use this information in Operating Plan Document, collection analysis
- Tableau A/R Report for Infoporte coming later this year

| (Core Name) | | | |
|-------------|--------------|-------------------------------------|----------|
| | 0 - 30 days | University of Johannesburg | \$2,162 |
| | 61 - 90 days | Juniata College | \$1,459 |
| | over 90 days | Bien-Etre Labs | \$9,343 |
| | | Duke University | \$2,494 |
| | | Loop Genomics | \$1,454 |
| | | North Carolina A&T State University | \$10,462 |
| | | University of Calgary | \$3,104 |
| | | University of Salamanca | \$3,302 |
| | | University of South Carolina | \$7,920 |
| | Total | | \$41,700 |



Research Core Development

Meghan Kraft - Interim Director of Research Core Strategy

Ben Wright - Director of Research Core Development

Michael Akridge - RCD Financial Analyst



OVCR Cost Sharing Program

The Office of the Vice Chancellor for Research (OVCR) contributes matching funds, or cost-share, for costs related to enhancing research at UNC.

The OVCR will consider cost-share funding requests for the following:

Extramural grant proposals that require matching funds

New technologies that facilitate the advancement of research at the university

Other specific needs that are of strategic importance to research for the university

More info here: <https://research.unc.edu/researchers/programs-projects-services/>



OVCR Cost Sharing Program

Submission deadlines:

| CYCLE | COST SHARE REQUEST SUBMISSION DEADLINE | NOTIFICATION OF FUNDING DECISION |
|---------|--|----------------------------------|
| CYCLE 1 | October 31 | Mid November |
| CYCLE 2 | January 2 | Mid January |
| CYCLE 3 | February 28 | Mid March |
| CYCLE 4 | April 30 | Mid May |
| CYCLE 5 | June 30 | Mid July |
| CYCLE 6 | August 31 | Mid September |

Matching commitments need to be obtained from department chair(s) and dean(s) and other relevant units with the appropriate approvals by the submission deadline.



OVCR Cost Sharing Program

1. Financial Requests- make sure Meghan Kraft is aware (kraftmeg@unc.edu)
2. 1/3 rule – funding from sources 1/3 1/3 1/3
3. Timing is key!

Criteria for funding of cost-share requests:

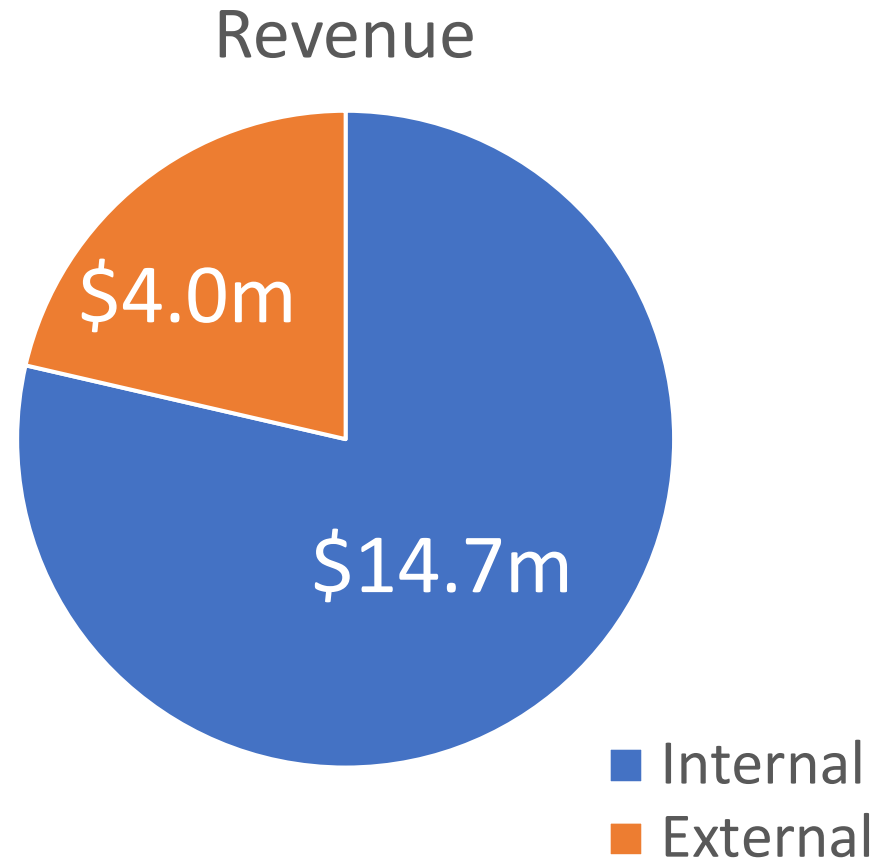
- Leverages external funds
- Benefits multiple departments and schools
- Avoids unnecessary duplication of resources
- Availability of funding
- Matching funds are provided by participating units (e.g. departments and schools, center/institutes, offices)
- Responsive to current university strategic priorities



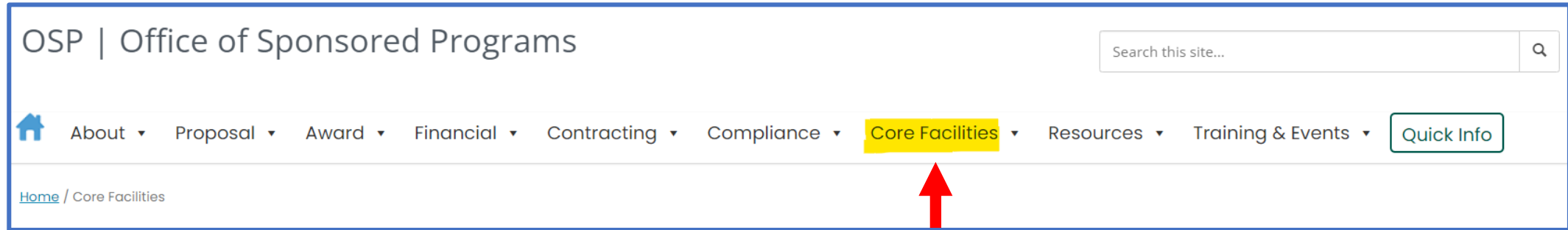
FY2024 (1st Half) Highlights

Through 12/31/2023

- \$14.7 million internal revenue
- \$4.0 million external revenue
- Over 1,500 unique project IDs
- \$3.4 million in F&A generated
- 600 UNC labs
- 180 external customers incl. 80 universities
- 100 UNC departments used core services



New RCD Webpage



“Core Facilities at UNC”

Core Facilities List
(Contact RCD for updates/changes)

“iLab” – “iLab Training”

iLab training videos

“Core Facilities Forms”

RDW and Operating
Plan templates

<https://osp.unc.edu/core-facilities/>



iLab News and Updates

- As of February 2024, UNC license increased to 60 seats
 - 3 cores onboarding in Spring 2024; 7 seats left for CY2024
- Institutional Landing Page now live!
 - First page for anyone not yet logged in
 - Core list, description, and contact information
 - Contact RCD for changes/updates
- iLab training resources available on RCD webpage
 - <https://osp.unc.edu/core-facilities/ilab/>
 - “iLab Training” tab
- CoreSupport@med.unc.edu



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sign-up or login

[About UNC Cores](#) [UNC Core Facilities by Category](#) [Search \(Under Construction\)](#)

Welcome to the UNC Chapel Hill Core Facilities iLab Landing Page!

Check out the “UNC Core Facilities by Category” tab to explore the core facilities available at UNC!

UNC Research Core Facilities are shared resources which offer a wide range of services to the research community, including cutting edge technologies, high end instrumentation, technical support, and education. Our facilities are committed to enhancing and expanding the collaborative capabilities of research at UNC-Chapel Hill.

Research Core Facilities are the backbone of the research infrastructure at UNC. Many core facilities also offer services to customers outside of UNC, including other Universities and private companies.

UNC’s research core facilities offer services in a broad range of disciplines, including analytical chemistry, biostatistics and bioinformatics, genetics and genomics, microscopy, imaging, tissue and cell culture, nanofabrication, drug development, and many others. Use the “UNC Core Facilities by Category” tab for a list of available core facilities at UNC.

[Visit the UNC Office of Sponsored Programs Research Core Development website here.](#)

The “Search” tab is currently under construction.

Advance Payments

Customers might ask if they can pre-pay for services not yet provided



Not allowable!



If PI disagrees, feel free to reach out to RCD



Memo going out to campus early CY2024



Contact Information

Research Core Development Team Inbox: RCD@unc.edu

iLab Support: CoreSupport@med.unc.edu

Meghan Kraft: KraftMeg@med.unc.edu

Ben Wright: BWright1@email.unc.edu

Michael Akridge: Michael_Akridge@med.unc.edu

OSP RCD Webpage: <https://osp.unc.edu/core-facilities/>



Thank you!

Thank you to our wonderful presenters!

Jonathan Crabtree, Ph.D. - Research Data Management Core Director

Alyssa Stepien - University Art Director and Brand Manager

Robby Poore – Director, UNC Creative

