

## **Regional Network Meeting – Meeting Report**

**Region:** North East

**Date:** Tuesday 27<sup>th</sup> March 2012

**Venue:** Newcastle University

### **Agenda:**

10:00 – 10:15am	<b>Coffee and registration</b>
10:15 – 10:30am	<b>Welcome</b> – Linda Robinson, Newcastle University
10:30 – 10:45am	<b>HEaTED Update</b> – Rachel Crossley, HEaTED
10:45 – 12:00pm	<b>Services Management</b> - Martin Cox, Head of Faculty of Medical Science Enterprise, Newcastle University
12:00 – 1:00pm	<b>Lunch</b>
1:00 – 2:00pm	<b>Hot Topics</b> – opportunity for discussion
2:00 – 3:00pm	<b>Tours of Newcastle University's Culture Lab</b>

### **Key discussion points from each agenda item:**

- Rachel Crossley delivered the HEaTED Update ([Appendix 1](#)).  
59 institutions are currently signed up to HEaTED, 1800 individual members. Membership benefits include discounted rates on specialist training, soft skills training guides, regional networks and resulting reports, E-forums and discussion groups, technical specialist resources/guides repository, support with professional registration. HEaTED aim to revise the current programme of technical specialist workshops advertised on the HEaTED website. All courses will eventually be mapped to a competency framework.
- Martin Cox, Newcastle University, Assistant Director, Research and Enterprise Services ([Appendix 2](#)).  
Martin gave an excellent presentation on 'Services Management', followed by a question and answer session.

### **Issues to be fed into eForums**

A discussion took place regarding communication between NE regional group members. It was agreed that establishing the network has enabled the technical managers from the various institutions to work/communicate effectively. The intelligent use of eForums will enable this to be expanded to the wider Technical Community. The following issues to be put on the Regional eForum.

- Carriage of Dangerous Good by Air Certification course will be run from 25-27 May 2012 in Newcastle. To book go to: <http://www.heated.ac.uk/courses.php?id=744>
- With the increase of student fees Julia Spoors raised the point of how other Universities were planning to meet student expectations. It has been suggested that Julia Spoors circulates some information from a recent presentation she attended to the group – suggest this is also done by eForums.

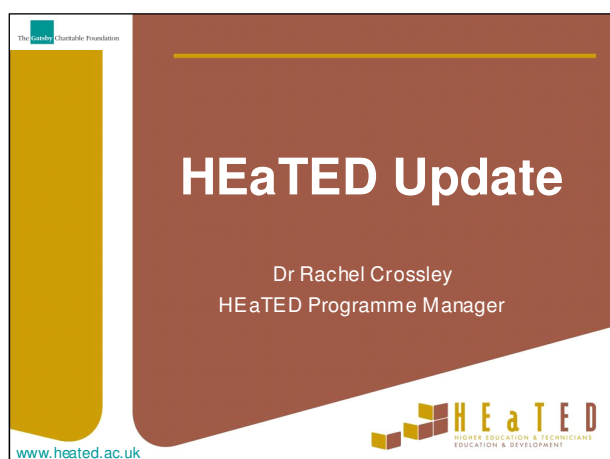
**Discussion points to be incorporated into forthcoming meetings:**

1. Launch of new HEaTED site post May 2012
2. Use of associated eForums
3. Topics for inclusion in the HEaTED conference, January 2013

**Actions from Hot Topics Discussion Session:**

1. Rachel Crossley to arrange for the HEaTED update slides to be circulated to members.
2. Elizabeth Wood suggested that an accredited 'Shipping of dangerous goods' event should be delivered in the North East region. Rachel Crossley to investigate HEaTED organising a regional event.
3. Rachel Crossley suggested that technical staff need to be encouraged to sign up to HEaTED. Information to be disseminated regarding benefits of joining HEaTED. Need to consider topics for regional grassroots meetings.
4. Janet Smith suggested that Rachel Crossley could promote HEaTED by attending University events. Peter Scott suggested that Sunderland need to be informed of the benefits for joining, Janet Smith suggested that Teesside were also in the same position.
5. A discussion was held on the timing of a HEaTED conference. Rachel Crossley informed group that an Autumn date was being considered. Members felt that the timing of this could potentially be problematic due to the workloads of technical staff. It was suggested that January could be more convenient – Rachel Crossley to investigate.
6. Linda Robinson to raise this at next regional staff developers meeting in April.
7. With the increase of student fees John Ayers raised the point of how other Universities were planning to meet student expectations. Rachel Crossley suggested she circulate some information from a recent presentation she attended to the group.
8. John Ayers suggested that HEaTED needed to raise this at a senior level – professionalisation of the service.
9. The next Regional Network Meeting will be held at Leeds University. Date and time to be confirmed.

## Appendix 1. Rachel Crossley - HEaTED Update



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# HEaTED Update

Dr Rachel Crossley  
HEaTED Programme Manager

**HEaTED**  
HIGHER EDUCATION & TECHNICIANS  
EDUCATION & DEVELOPMENT

[www.heated.ac.uk](http://www.heated.ac.uk)

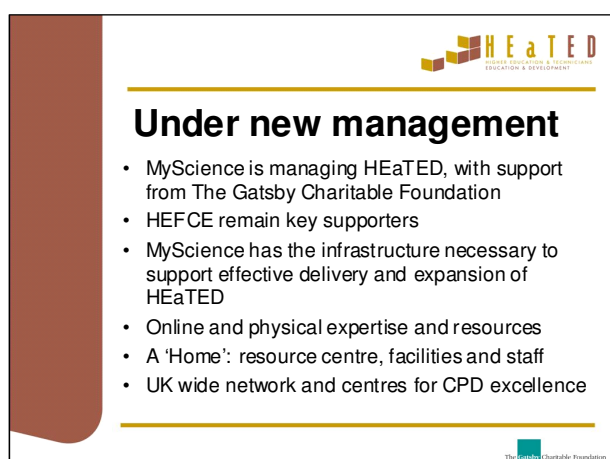


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## Objectives for today

1. Establish exactly what HEaTED is
2. Outline what HEaTED can do to support your professional development
3. Your role in getting the best from your membership

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## Under new management

- MyScience is managing HEaTED, with support from The Gatsby Charitable Foundation
- HEFCE remain key supporters
- MyScience has the infrastructure necessary to support effective delivery and expansion of HEaTED
- Online and physical expertise and resources
- A 'Home': resource centre, facilities and staff
- UK wide network and centres for CPD excellence

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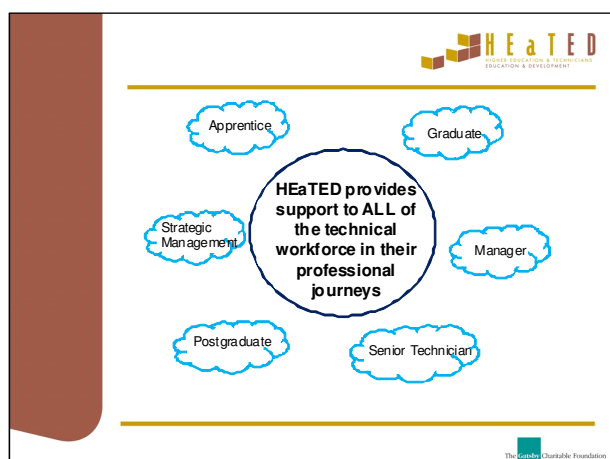


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## The Team

- Programme Manager – Dr Rachel Crossley
- Course and Regional Network Coordinator - Dr Katherine Forsey
- Consultants
- Regional Coordinators across the UK
- Central Admin, Finance, IT, Communications teams at the NSLC

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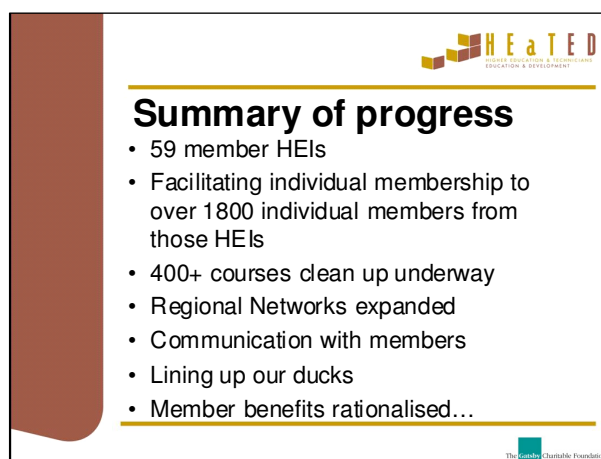


**HEaTED**  
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HEaTED provides support to ALL of the technical workforce in their professional journeys

Apprentice, Graduate, Manager, Senior Technician, Postgraduate, Strategic Management

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## Summary of progress

- 59 member HEIs
- Facilitating individual membership to over 1800 individual members from those HEIs
- 400+ courses clean up underway
- Regional Networks expanded
- Communication with members
- Lining up our ducks
- Member benefits rationalised...

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## Member benefits

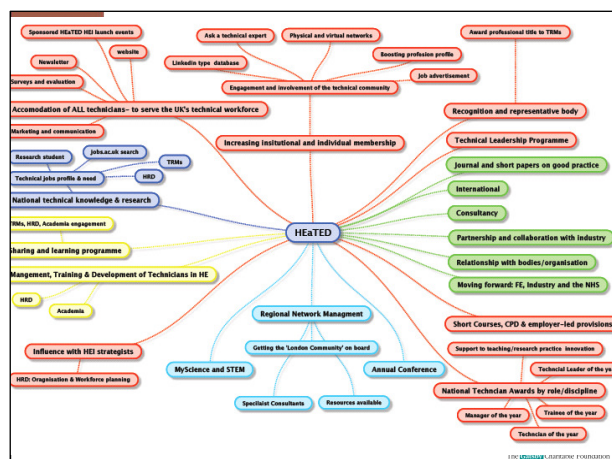
- Discounted rates on specialist technical courses and soft skills courses
- Exclusive specialist training (including QC)
- Soft skills training guides
- Regional Networks and resulting reports
- Eforums and discussion groups
- Technical specialist resource / guide repository
- Support with Professional Registration

## Planned Activity

- Website / courses database overhaul
- Special relationships with key Professional Bodies
- Practical support with Professional Registration
- Raising awareness of key issues impacting Technical staff / lobbying
- Skills sharing function?
- Annual conference – January 2013
- Reactive changes – where you come in!

## Your turn...

- A) The key issues arising from the current economic climate in universities and the consequences on you in delivery of technical services
- B) How can ALL technical staff benefit from / exploit / influence HEaTED?



## Appendix 2. Martin Cox, Newcastle University - 'Services Management'

‘Services Management’

HEaTED meeting, Newcastle, 26/3/12

Martin Cox  
Assistant Director, Research and  
Enterprise Services

# 'Services Management' – what I will talk about

- Some context on research facilities in the university sector
- How we have started to manage large research facilities in the Faculty of Medical Sciences at Newcastle University
- Marketing
- Finance
- HR





# 'Services Management' – what I won't talk about

- How to run your services – one size certainly doesn't fit all
- How any of the principles we've developed in FMS can be applied beyond research facilities
- How to get universities working better together to share kit
- How to get academics working better together to share kit

Newcastle University NHS

# Some context

- Comprehensive Spending Review
- Capital spend of RCUK been cut by 50%
- Effect: demonstrate you haven't got one already
- For really big things: demonstrate no-one near by has got one already
- (Some interesting inequities with charitable funding)

 Newcastle University 

RCUK guidance

**Research Councils UK  
Efficiency 2011-15:  
Ensuring Excellence with Impact  
Changes to requests for equipment from 1<sup>st</sup> May  
2011**

 Newcastle  
University 

# Items of equipment grants in a nutshell

- Between £3k and £10k (inclusive of VAT): requested and justified under directly incurred costs.
- Between £10k and the OJEU threshold value (inclusive of VAT £121,588): Investigators should first check the University's asset register to establish whether there is any possibility of sharing an existing item of equipment instead of purchasing one. Ideally, other universities should also be consulted on the possibility of sharing. If sharing is not possible, the equipment can be requested on the funding application. If the application is successful, RCUK will contribute 50% of the cost. The University will be required to cover the other 50%.
- Items of equipment over the OJEU threshold value (net of VAT £1,323, inclusive of VAT £121,588)  
In principle, this equipment may be funded at 100% IEC, if a strong case can be made for its use and consideration made for access by others as appropriate. All funders have adopted slightly different approaches to this and applications for this equipment of this value need to be made through a business case.



# The Universities' responses

- Northern Way response to aid equipment sharing within and between Universities. Hailed by the Research Councils as an example of good practice.
- 'Asset Taxonomy' developed in Leeds. Audit across all universities
- Individual universities response – FMS Dean sign-off
- Charitable funding – growth of inequities

 Newcastle University

 NHS

[illegible]

## Some different context: Faculty of Medical Sciences, Newcastle

- 387 academics (138 clinical), 531 post docs
- 307 managers/clerical/admin, 214 technical/specialist
- Turn-over ~ £146m this year
- Research income ~ £60m p.a.
- Most strategic finance (salaries etc.) held at Faculty level
- 7 Institutes and 4 Schools are other budget units
- Asset register value of equipment: small Institute £6m; (£58m 'unallocated' across university!)



## Facilities review 2009

- How to get better value from our equipment – in order to support better science
- How to reduce unnecessary duplication
- How to manage the facilities
- How (whether?) to cover costs
- (many of our facilities run jointly with Newcastle Hospitals)



## Conclusions

- Following slides are taken from my presentation at Faculty Executive Board June 2009



There are some things we simply **have** to have

Any subsidies should be transparent and in 'exchange' for good business practices

Enterprising PIs should not be put off by the 'dead hand of bureaucracy'

The **key** markets are internal

(but that's not to stop external customers)

## Some Principles (and a bit of detail)


Issue 1:

Scientific Facilities should be categorised into three types:

Type A: Facilities managed centrally by the Faculty, with a clearly identified list reviewed annually by FRSC and approved by Faculty Budget Group.

Type B: Multi-user facilities held at Institute level. Financial accountability is delegated to Institutes.

Type C: Small pieces of kit held by individual PIs or Groups.


Faculty of Medical Sciences 

### Issues for discussion identified by FSG – slide 2

Issue 2:

Review staffing with a view to introducing the following posts (without increasing core funded FTEs):

- A 'Facilities Operations Manager' to oversee all Type A facilities, in around 12 months time.
- 'Experimental Scientific Officers' to run all Type A facilities, including one ESO designated to oversee the three FACS facilities. Up to 20% research time to be built into ESO contracts to allow time for developing new techniques and skills.
- Look at the possibility of appointing a fixed term post in Bio-imaging to work alongside the existing bio-imaging manager (potentially funded via Wellcome or by re-organisation of existing staff).

Faculty of Medical Sciences 

### Issues for discussion identified by FSG – slide 3

Issue 3:


For costing and pricing there will be an expectation that for Type A facilities a minimum of 75% of costs will be recovered. This will be reviewed annually by Faculty Budget Group and FEB.

Issue 4:

Historic debt should be wiped out from the facilities' existing accounts.

Issue 5:

Set a threshold of £120k for equipment purchases. Any planned purchases above the threshold must have prior approval from the Dean of Research (or, possibly, someone else appointed by FRSC to perform this task).

Faculty of Medical Sciences 


### Issues for discussion identified by FSG – slide 4

Issue 6:

That FRSC be asked to consider the appointment of an academic lead for the facilities, who will support the Dean of Research.

Issue 7:

A consistent approach to costing and pricing is required across Institutes. Facilities should be costed properly and built into pFACT. There is no requirement to include depreciation costs.

Faculty of Medical Sciences 

### Issues for discussion identified by FSG – slide 5

Issue 8:

Biobank to be classed as a Clinical Research Platform.

Issue 9:

Review and rationalise GMP facilities and re-classify as a Clinical Research Platform.

Issue 10:



The Systems Biology Resource Centre in CISBAN and the Faculty's Bio-Informatics facility need to be aligned.

Issue 11:

That there should be a review of CBC operation and reporting.



## Conclusions

- Concept of 'Faculty facilities'
- Used by range of researchers across Faculty
- Not restricted to one (or even two) Institute(s)
- Started with 5, now 7 (2 as fixed-term experiments)
- A word about 'Clinical Platforms'

## Finances

- Minimum 75% cost recovery
- Above 100%: in-year surpluses spent
- Management of budgets locally by team
- Monthly reporting
- Debt 'wiped off' each year by Faculty – so clear 'subsidy'/'investment'
- No requirement for depreciation
- (NB: TRAC and Newcastle)


## HR issues

- 'Senior Experimental Scientific Officer': highly skilled individuals running core facilities, responsible for all operations, finances and marketing – currently 5
- 'Experimental Scientific Officers' – currently 8
- Technicians – currently 1
- Report to Assistant Director, Research and Enterprise
- Academic leads and academic user groupss

## Marketing

- Internal
- Irrespective of how we categorise internally
- Flyers, banner stands etc.
- New websites:
- <http://www.ncl.ac.uk/business/facilities/research/index.htm>





## External marketing

- Some facilities are generating significant external income: £20-30k p.a.
- Cost vs. price
- Contracts all handled by commercial team – not by individual facilities
- A word about VAT
- *This is not the primary purpose of the facilities!*

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## How have we done?

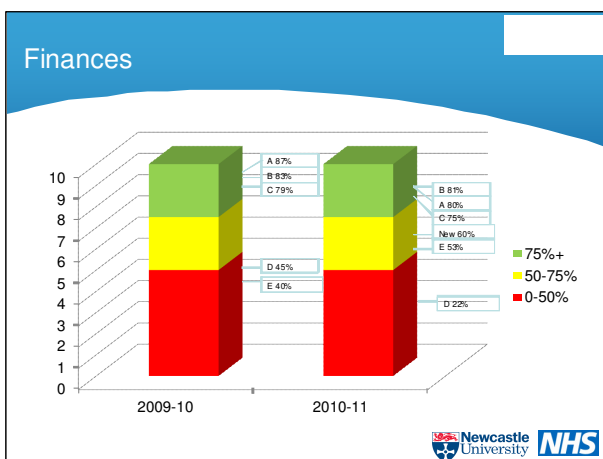
- Next 2 slides as reported to Faculty Research Strategy Committee last December

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## Science (very crudely)

- Publication numbers this year by facility :
- A - 16
- B - 14
- C - 18
- D - 5
- E - 24

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## Some conclusions

- Central focus on science – we're business-like but not a business
- Good staff
- Internal marketing is key – but external work can be useful too
- This is going to become a bigger issue

Newcastle University NHS