Specification of requirements regarding the core facilities at Karolinska Institutet and Region Stockholm

Background
Karolinska Institutet (KI) and Region Stockholm need well-functioning, accessible and professional core facilities at the cutting edge of science and technology in order to conduct world-class research. Core facilities are not only important for ongoing activities at the university, they are also important for successful competitions for the best students and researchers.

Important parts are that:
- You should be able to find clear information about the core facilities we have at KI and Region Stockholm, how they are operated and how they can be utilized
- Administration, agreements, invoicing, annual reporting and statistics are reported in a consistent and correct manner
- The core facility takes responsibility for education, sustainability and collaboration
- The core facility is customer oriented with clear leadership
- The core facility must not be profitable

Specification of requirements
In order to facilitate the operation of the core facility, increase accessibility for customers as well as to increase the value of core facilities, we have specified the requirements needed to be competitive when applying for core facility support from KI and Region Stockholm.

Scientific director
In order to guarantee the scientific competence and use of frontline technologies, the core facility must have a designated scientific director.

Management
For each core facility there should be a person who is operationally responsible for operations and reporting to the steering group for KI's core facilities supervised by the Infrastructure Council. This includes responsibility for:
- Supervision, incl. skills development of the staff at the core facility
- Budget, incl. follow-up (accounting, billing)
- Marketing
- Customer relationships (counseling, training, contract, case management, prioritization)
- Quality assurance (equipment, services, procedures, customer relations, capacity and, if necessary, certification)
- Follow-up of technical / scientific developments within the core facility
When applying for core facility support, a job description and a specification of requirements for the appointment / assignment as manager shall be established. If a named person already exists, then his/her CV should be attached.

**Administration**
All core facilities should use a common administration program which is currently under procurement. The intention is that the system is installed before allocation of core facility support takes place in early 2019. The requirement for the administration system is to handle customers, bookings, invoices and statistics, etc. KI and Region Stockholm will sponsor parts or entire license fees for core facilities that meet the requirements of a core facility.

**Assignment description and agreement**
The core facilities will prepare an assignment description with their customers, indicating what to do and who is responsible for the various tasks. Both the core facilities and the customer’s commitments must be clearly described when the service is ordered (cost, delivery time, quality requirements and consequences if commitments are not met). Unless the assignment description is made with the customer, the customer relationship and description of how the assignments are performed shall be on the website.

**Communication**
All core facilities that meet the requirements will be published on a website at Karolinska Institutet's research portal. Core facilities that do not meet the requirements of a core facility, such as core facilities in boot phase and smaller core facilities, can be listed separately. Respective Principal Brand, Graphic Profile, and Website Guidelines should be followed.

**The webpage**

**Name**
The name of the core facility should be understandable to the target group and clearly signal that it is a research infrastructure and a manned service facility. This means that the words nodes, centers, institutes, academies should be avoided. The names should be descriptive and the connection to the respective principal will be evident from the context, for example, that you have their website on KI’s own website and describe the KI link in current text. Exceptions to the name rules can be made in cases where an already existing core facility has a well-known name in the field of science.

**Placement of web pages**
The basic rule should be that the location of the core facility's website reflects the core facility's organizational residence, i.e. core facilities in KI's premises and operated by staff employed by KI, have their web pages placed on the university's own website ki.se. This regardless of whether the target group is internal, external and/or if funding comes from other organization/s. It may also be possible to have your own separate, external website. Avoid having multiple sites with the same or different information.
Minimum level information and maintenance and website
Core facilities should always have clear and up-to-date information on the following:

- Organizational residence
- Partners and cooperation (if applicable)
- Financing
- Equipment and services offered
- How the queue system works and how to order the service as a customer
- Price list and billing information
- The name of the head of the core facility
- Contact information and visitor address

Customers
The core facility provides services or devices against a fee to customers without any demand of collaborations, co-authorship and the like. Customers are classified as internal (from KI or Region Stockholm) or as external (for example, from other universities, health care regions, authorities or companies). The core facility can handle customers differently depending on the category they belong to (internal or external), such as prioritization and pricing; such a policy shall, where appropriate, be available to prospective customers. The core facility will follow up and report the number of customers within the different categories.

Training
Core facilities should assist researchers with user support, education and information on how to best utilize the service or equipment. Customers will be provided with necessary assistance in planning experiment and analyzes as well as knowledge of methods and techniques.

Sustainability
Core facilities should work with sustainability and a long-term plan to meet the requirements of expertise and high standards from customers. Sustainability efforts should include:

- Implementation of "best practice"
- Implement and discuss the legal and ethical requirements
- Competence development for the staff
- Contribute knowledge by providing instruction and information to customers so that they can take care of the products, data, analyzes ordered
- Actively participate in relevant conferences, fairs and meetings
- Active planning to create stable funding
- Strive to communicate its expertise, technology and resources to the public

Cooperation
Core facilities will participate in KI’s core facility EXPO for both visibility, collaboration and marketing. In addition, KI plans to launch a core facility network with meetings at a few times a year to facilitate collaboration and discussions in which all core facilities will participate. Collaboration between core facilities is also encouraged to provide customers with comprehensive solutions.
Reference list – document and webpages

Rules and guidelines for webpages at KI (Dnr: 1-657/2013)

Brand platform of KI version 4.0, revised November 2014

About KI’s graphic rules at the staff portal

Research portal at ki.se

Website of KI’s central core facilities

The Swedish Research Council’s guide to research infrastructure 2018

OECD best practice guidelines for biological resource centres