UNIVERSITY OF ALBERTA

Guidelines for Equipment Purchases and Placement in Core Facilities or Other Research Spaces

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Approver:	Vice Dean, Research (Basic) - Faculty of Medicine & Dentistry

1. Purpose

The Faculty of Medicine & Dentistry (FoMD) has acquired a significant amount of research infrastructure through federal funding programs (e.g., Canada Foundation for Innovation) and other sources. The FoMD prioritizes the placement of infrastructure in core facilities to encourage broad use, and to support infrastructure oversight and maintenance to ensure sustainability. The FoMD, as delegated to the Office of Research, has final approval on placement of infrastructure in faculty research spaces. These guidelines detail the responsibilities and expectations of project leaders when integrating equipment into core facilities or other research spaces, including their own labs. The scope of these guidelines does not include necessary discussions with the FoMD Office of Facilities Planning and Projects when determining space suitability and budgeting for renovation costs.

2. Guidelines

2.1   Determination of Infrastructure Placement
a)   Faculty members leading sponsored infrastructure projects will first consult with the Manager, Core Research Facilities, and core coordinators/managers to determine whether the infrastructure is suitable for placement in a core facility. The Manager, Core Research Facilities will involve the expertise of the core academic user committees and the FoMD Office of Facilities Planning and Projects when determining suitability.
b)   The Manager, Core Research Facilities will make a recommendation to the Vice-Dean of Research (Basic) on placement of infrastructure in core facilities or other research spaces.
c)   The Vice-Dean of Research (Basic) will make the final decision on infrastructure placement. Decisions will be communicated in writing to the project leader(s).

2.2   Equipment Placed in FoMD Core Facilities
a)   Infrastructure placed in a core facility will adhere to [all policies and operational procedures](#). This includes, but is not limited to, integration into current governance and oversight structures, collection of user fees, and adhering to all booking and access policies.
b)   Major infrastructure purchases will include a service contract, ideally totaling 5-years coverage, in the sponsored project budget request.
c)   All researchers accessing the infrastructure, including the grant applicants, will pay user fees as determined by the academic user committee. User fees are subsidized for internal UofA users.
d)   For CFI awards, the project leader(s) will consult with the Manager, Core Research Facilities when developing their Infrastructure Operating Fund (IOF) budgets and IOF funding associated with the infrastructure will be dedicated to core operations. The core will support annual reporting to CFI.

e) For CFI awards, the project leader(s) will be granted priority access to the infrastructure housed in the core facilities for the duration of the research project.

f) The FoMD assumes all responsibilities with ensuring sustainability of and access to the infrastructure for its useful life. This includes allocating financial and personnel resources to the maintenance and repair of the infrastructure beyond initial CFI investments.

2.3 Equipment Placed in FoMD Research Laboratories and Other Research Spaces

a) If infrastructure requests are not suitable for placement in a core facility, the Office of Research will support the placement of the infrastructure in another research space. This may be a department-managed shared space, a research laboratory, or other suitable space identified in collaboration with the project team and the FoMD Office of Facilities Planning and Projects.

b) It is the responsibility of the project leader(s) and/or their department(s) to implement oversight and operation mechanisms that ensure long-term infrastructure sustainability. This includes, but is not limited to, collection of user fees, forming governance and oversight structures, allocating technical support or personnel resources, and purchasing service contracts.

c) The project leader(s) assumes all responsibilities with ensuring sustainability of and access to the infrastructure for its useful life. This includes allocating financial and personnel resources to the maintenance and repair of the infrastructure beyond initial CFI investments.

d) In cases of unexpected repairs or maintenance costs, faculty members can request one-time financial support via the Research Infrastructure Support (RIS) fund for CFI equipment and through the Faculty Supported Research Instrument Repairs & Maintenance Terms of Reference for non-CFI infrastructure.