



# Part 1: Strategic Management for Shared Research Resources, SRR's (Cores)

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## Definitions

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*Strategic management is the ongoing planning, monitoring, analysis and assessment of all necessities an organization needs to meet its goals and objectives - **Linda Tucci***

*Strategic management is the planned use of a business' resources to reach company goals and objectives – **Indeed Editorial Team, 2021***

*Strategic management involves setting objectives, analyzing the competitive environment, analyzing the internal organization, evaluating strategies, and ensuring that management rolls out the strategies across the organization. -**WILL KENTON 2022***



**About HBIC**

- State-of-the-art Imaging resource at the University of KS Med. Ctr (KUMC)
- Clinical and pre-clinical imaging capabilities – human & small animal models
- Team of faculty and research support personnel
- Supports KUMC investigators and regional institutions & partners
- Key imaging resource for 5 NIH funded programs (ADRC (P30), PKD (U54), CTSA (U01), KUCC (P30), COBRE's, K-INBRE's (P20), various R01's, industry
- Supports over 150 PI's, ~ 200 projects in various stages
- ***Strategic positioning & collaboration with all partners and stakeholders is critical***

**About me**

- ~ 18 yrs with the Hoglund Biomed Imaging Ctr (HBIC) at KUMC
- Direct Business & Strategy, plus operations
- The “business” of Science
- “No margin, no mission”
- Partnerships, collaborations, understanding, lots of grace!

**About KUMC**

Primary medical Ctr/school for state of KS.

**Mission:**

- Teaching/training
- Research
- Clinical care
- Service



# Why Strategic Management?

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**“If you don’t know where you’re going,  
any path will take you there.”**  
—Sioux proverb



# Outline

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- Strategic framework for Core
- The role of Core facilities
- Understanding Key Core stakeholders
- Mission alignment
- Managing expectations
- Strategic Investments
- Long-term planning

## Strategic Framework for SRR's (Cores)

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- Understand why your core exists
- Understand your core's key *stakeholders* and *partners*
- Strategically plan, execute and align your core activities to meet *stakeholder goals and expectations*
- Leverage resources (investments) and relationships to *maximize* your core's *impact* to each stakeholder
- Identify meaningful metrics to measure *impact* and *Return on Investment* (in collaboration with stakeholders)
- Adopt *best practices* and a cycle of *continuous improvement*





Research • Technology  
Communication • Education

# Understand Why Your SRR Exists

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## Question

- *Why does your SRR/Core program exist? How does it serve your institution's needs?*

# Understand Why Your SRR Exists

## (Previously Shared Examples)

- Serve research and training missions
  - Contribute to clinical mission (for Med Ctrs.)
  - Act as hubs for innovation and discovery
  - Contribute to faculty recruitment and retention
  - Contribute to Workforce development and DEI effort
  - Contribute departmental/Institutional goals and reputation
  - Foster regional research collaboration
  - Stimulate economic activity
  - Support the scientific output
  - Provide niche expertise
  - Makes access to resources possible
  - Increase efficiency
- Leverages economies of scale
  - Support education and training missions of the institution
  - Support research infrastructure
  - Helps with recruitment efforts
  - Institutional prestige
  - Institutional knowledge
  - Extramural research applications >>> \$\$\$ to institution
  - Attract \$\$ from Philanthropy
  - Advance and support new cutting-edge technologies
  - Connect with industry in providing technologies
  - Fosters inter-institutional/regional collaboration and relationship
  - Promote community engagement





# Understand SRR Stakeholders and Partners

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## Question:

*Who are your Core's stakeholders and partners?*

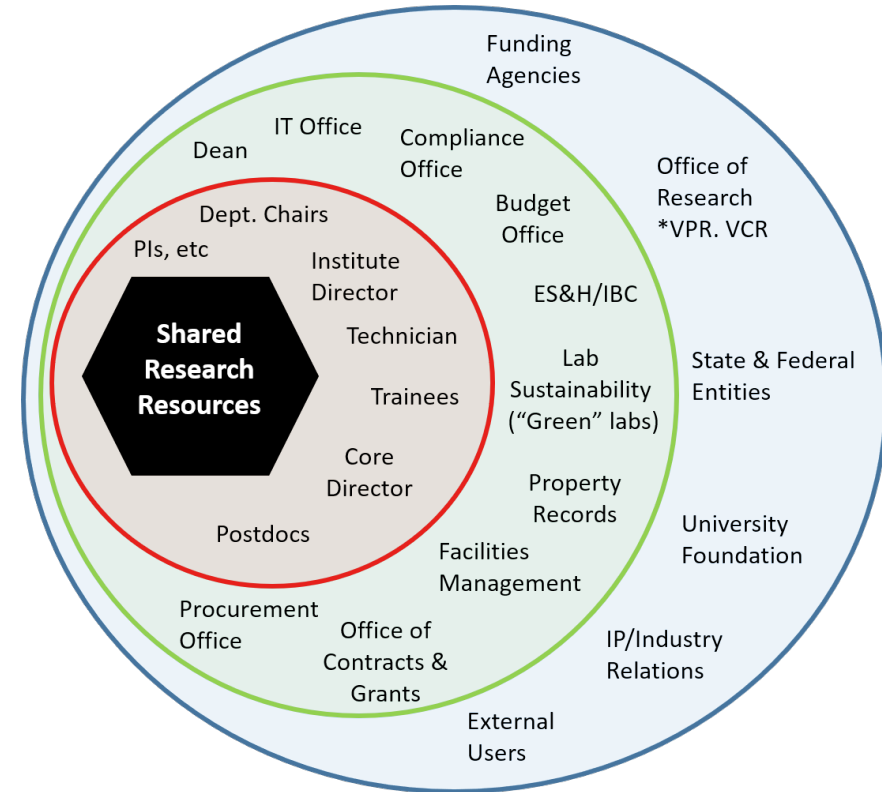
# Understand SRR Stakeholders and Partners

## The Core Ecosystem

### To Note:

- ❖ Each institution is unique
- ❖ Each core is unique
- ❖ But core stakeholders remain largely similar across institution and discipline
- ❖ Important to understand the interconnectedness between stakeholders for a robust ecosystem
- ❖ Important to understand stakeholder needs and expectation to maximize core relevance and impact

- Operational Relationships
- Integrative/Influencer Relationships
- Strategic Relationships



*\*Source: FASEB Report "Maximizing the value of SRR Part II"*

# Mission Alignment

❖ Strategic management involves aligning core goals and activities with stakeholder goals

## KUMC Mission Pillars

- Research
- Teaching/training
- Clinical Care
- Rankings
- Innovation

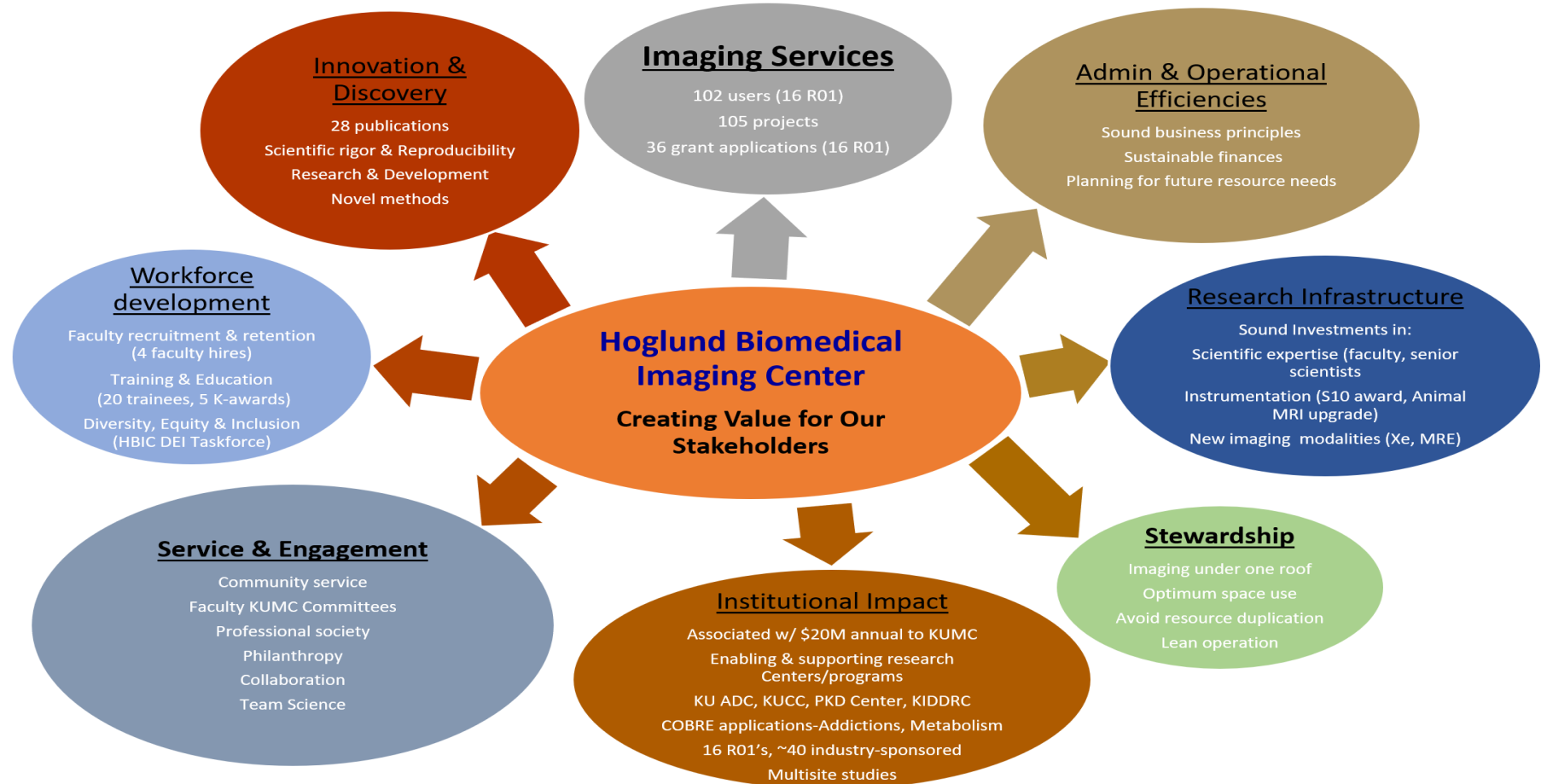


## Hoglund's Offering/Positioning

- Offers state-of-the art infrastructure and imaging expertise to support research. Streamlines systems & processes for max ROI
- Mentors students, postdocs, junior faculty
- Avails unused research capacity for clinical use to reduce patient wait times on clinical scanners
- Key resource for major Program grants - \$25M /year
- Develops & deploys cutting edge imaging methods & techniques to support innovation

# Mission Alignment

**The Hoglund Biomedical Imaging Ctr**  
*Creating Value for our Stakeholders*



# Managing Expectations

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▪ **Question:**

How is your core meeting user/stakeholder goals and expectations?



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# Managing Expectations

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- Do you have the right Core infrastructure in place?
- Do you have a good support team to assist users?
- Do they provide good customer service to users?
- Is your core accessible?
- Are your rates affordable?
- Are you meeting deliverables to users and hitting timelines?
- Are you communicating effectively with users and other stakeholders? Is there a feedback loop in place?
  - Surveys, Mailing lists, newsletters, Core Reports/Evaluations, Return on investment assessments
- Is your core/core program being impactful?

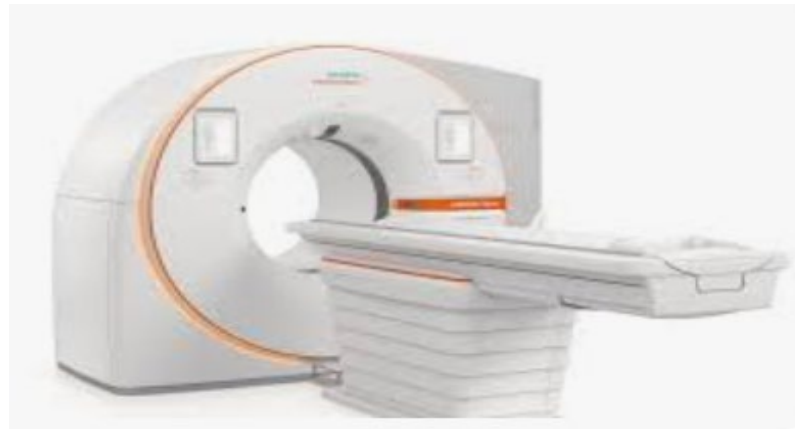
# Strategic Investments

## • Capital

- Buildings/Space
- Equipment
- Systems and processes
- Other



KU University of Kansas Medical Center  
KU Clinical Research Center celebrat...



## Operational

- Staffing
- Maintenance
- Supplies
- Other



# Strategic Investments – Key Parameters

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## Equipment

- Buy or lease?
- Existing complimentary services & technologies?

## Core Staffing

- Skills and expertise
- In-house/existing?
- New hires or contractual?
- Employee development & retention

## Space

- Siting
- Build? Renovate?
- Leverage available options

## Maintenance

- Service contracts?
- 3<sup>rd</sup> parties?
- Self-insured?
- In-house expertise?
- Group purchasing power?
- Leverage available options



# Sourcing Core Investments

**Example:** *Sourcing Core Investments for a new instrument*

- Group of investigators/users
- Departments
- Colleges/Schools
- Institutions
- Community/Philanthropy
- States
- Federal agencies (*S10- NIH, MRI-NSF, R50 NCI, CDF-HRSA*)
- Business/industry partners
- Other



- \$\$
- Equipment
- Buildings/Space
- Effort/Expertise
- Goodwill/Advocacy

# Sourcing Core Investments – Key parameters

- Stakeholders (*aka “investors”*)
- Resource commitments
- Duration

- \$\$
- Equipment
- Space
- Effort/Expertise
- Goodwill/ advocacy

## **Informs:**

- Evaluations/ Core reporting obligations
- Expectations/ returns (ROI)
- Mission alignment
- Sustainability

# Sourcing Core Investments – Other Considerations

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## *When you have a deal...*

### 1. Establish business, operational models

- ❖ Site and install the instrument
  - ❖ Determine user types and levels of interaction w/core - internal, external, industry
  - ❖ Establish management, personnel structures
  - ❖ Establish Oversight/Advisory boards
- ❖ Market your new service
  - ❖ Establish short term budgets
  - ❖ Establish Rates/Fee structures
  - ❖ Determine Core access & access levels
  - ❖ Determine Operational models
    - ❖ Fee-for-service
    - ❖ Collaborative, Other models
    - ❖ Deliver quality service
  - ❖ Establish long-term budgets and plans for sustainability to return greater ROI and impact to stakeholders

# Sourcing Core Investments – Other Considerations

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## *When you have a deal...*

1. Establish business, operational models
2. Assess performance against set goals
3. Adopt best practices and a cycle of continuous improvement

# The Business Model Canvas

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## Definition

“A shared language for describing, visualizing, assessing and changing business models. It describes the rationale of how an organization creates, delivers and captures value”.

# The Business Model Canvas

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**An illustration**



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Communication • Education*

# The Business Model Canvas

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**Thanks!**