*Due August 30*

*Report Covers Prior Fiscal Year (FY) - FY runs July 1-June 30th*

The following annual report template is designed to gather data to provide Shared Facility Directors and staff with the information needed to support ongoing strategic planning and business development. This process will help increase visibility, utilization, and efficiencies for equipment and facilities within your organization. Additional focus on gathering information related to management and operations, training activities, financial management, and grantsmanship will further support these goals.

## Title Page

* 1. Shared facility name, director name, year annual report submitted

## Administration and Governance

* 1. Overview
     1. Purpose and Mission Statement
        1. Provide current mission statement, purpose, and main activities for the facility. This is an opportunity to briefly communicate to prospective users what this facility is about. Example Facility Mission Statements ([ETSU](https://www.etsu.edu/com/microscopy_facility/), [TTU](https://elpaso.ttuhsc.edu/oire/_documents/1%20How%20to%20Write%20an%20Effective%20Mission%20Statement.pdf)).
     2. List faculty director and faculty advisory committee (if applicable)

## Research and Technical Staff

* 1. Provide a list of all full and part-time staff working for the facility. Include student staff if applicable.
     1. Describe technical expertise and qualifications
     2. Coverage
        1. Describe full time facility staffing needs and coverage
     3. Professional development
        1. Describe professional development and training requirements and opportunities for technical staff

## Facilities and Location

* 1. List locations where services are provided:

|  |  |  |  |
| --- | --- | --- | --- |
| Building | Room # | Sq. Ft. | Department(s) |
|  |  |  |  |
|  |  |  |  |
| ADD ROWS |  |  |  |

## Equipment / Instruments

* 1. List all equipment owned by the facility that is more than $5,000 (do not list common laboratory equipment)
  2. Update all equipment in the [Equipment Finder](https://www.mtu.edu/research/vpr-office/equipment-finder/) \*

\*Update using Add New Equipment form on website

*Example Table*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Equipment Name | ID# or SN | Purchase Date | Lifetime | Location (Bldg, Rm#) | Prior FY Usage (hrs/logins/samples) | Current FY Usage (hrs/logins/samples) | % (+/-) |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| ADD ROWS |  |  |  |  |  |  |  |

* + 1. Highlight equipment that was acquired in the last year
    2. Highlight equipment that is nearing end of life, explain the importance of the equipment and if a plan is known to replace, briefly describe

## Services

* 1. Provide a high level review of services offered by the facility
  2. Describe the types of services provided without charge. These may include services provided as a courtesy (e.g. advice or software access) or time & resources spent in anticipation of revenue-generating activity (initial consultations, pilot experiments). If services are provided free of charge as a part of the core’s mission (i.e. the service is fully subsidized), describe this arrangement.

## User Overview

*Note: understanding current users is crucial to business development and outreach for obtaining recurring revenue and growing new users by reviewing current user research interests and activities*

* 1. Provide a list of researcher users (faculty, research scientists, outside external industry staff, etc). Indicate internal or external, academic or organizational units.
  2. Please describe the types of research projects that primary research users are working on.

## Resource Management

* 1. *Budget Overview*
     1. Provide an overview of revenue and expenses for the previous five fiscal years

*Example Table*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | FY## | FY## | FY## | FY## | Current FY |
| Revenue | Total Use Fee Revenue |  |  |  |  |  |
|  | Shared Facility Grant |  |  |  |  |  |
|  | IRAD Return |  |  |  |  |  |
|  | Direct Charge |  |  |  |  |  |
|  | Other Revenue |  |  |  |  |  |
| Expenses | Salaries |  |  |  |  |  |
|  | Supplies/ Services |  |  |  |  |  |
|  | Equipment |  |  |  |  |  |
|  | Other |  |  |  |  |  |
| Balance |  |  |  |  |  |  |

* 1. *Financial Projection*
     1. Provide a financial projection of the next fiscal year.

*Example Table*

|  |  |  |
| --- | --- | --- |
|  |  | FY## |
| Revenue | Total Use Fee Revenue |  |
|  | Shared Facility Grant |  |
|  | Other Revenue |  |
| Expenses | Salaries |  |
|  | Supplies/ Services |  |
|  | Equipment |  |
|  | Other |  |
| Balance |  |  |

* 1. *Shared Facility Grant*
     1. Provide a table breaking down expenditures from the previous five years of shared facility grants and briefly explain how you have used your most recent shared facility grant

## Safety Overview

* 1. Describe any significant safety-related accidents, incidents, and near misses from the past year and measures put in place to prevent recurrences

## Future Plans and Goals

* 1. Describe your overall strategic plan and goals for the facility, including any growth goals
     1. Define goals and associated metrics for your shared facility for the next fiscal year
     2. Describe your strategies for increasing users and/or use of your facility
     3. List and describe any prospective internal and external users and operational funding sources
  2. Describe future anticipated major equipment \*acquisitions, maintenance, and repairs over the next few years

*\*For acquisitions, list the potential users and benefits, plans for staffing, maintenance, and supporting infrastructure*

## Challenges and Barriers

* 1. Describe any facility challenges or barriers and any help we or someone else at the university could provide to overcome them

## Optional appendices

* 1. List of publications that resulted from use of the facility
  2. List of research projects that used the facility