NEW FACULTY ONBOARDING

CHOP Research Institute
March 22, 2018
WELCOME

Beverly L. Davidson, PhD
Chief Scientific Strategy Officer
Director, Center for Cellular and Molecular Therapeutics

davidsonbl@email.chop.edu
267-426-0929

Richard Aplenc, MD, PhD, MSCE
AVP and Chief Clinical Research Officer

aplenc@email.chop.edu
267-426-7252
NEW FACULTY ONBOARDING

Outline

• Pre-arrival consultation
• Post-arrival assistance
• Human Resources
• Research Information Services
• Business Administration (grants and contracts)
• Faculty Affairs and Professional Development Office at Penn
  • CHOP Office of Faculty Development
• Office of Postdoctoral Affairs
• Research Compliance and Regulatory Affairs
  • Human, animal, laboratory research
NEW FACULTY ONBOARDING
Outline, continued.

• Responsible Research Training
• Department of Veterinary Resources
• CHOP Conflict of Interest Program
• Clinical Research Support Office
• Office of Technology Transfer
  • IP, Licensing, Contracts
• RI Cores
• Grant review groups
  • Pre-review consultation for K’s, R’s, etc.
ONBOARDING
Moving or starting your lab

Howard Eck
Director, Research Resources
eck@email.chop.edu
215-590-4662

FIRST ORDER OF BUSINESS:
Fill out ONBOARDING QUESTIONNAIRE!
ONBOARDING: Pre-arrival

• Lab Move
  • Freezers
  • Reagents (Biohazard, Frozen samples, Tissue samples, etc.)
    • IBC approval; MTA processes
  • Equipment
    • Special needs for the move?
    • Special needs once you arrive (e.g., emergency power)?

• Are there equipment purchases that will occur prior to your arrival?
  • Capital equipment, computers, phone set up, etc.?
ONBOARDING: Pre-/Post-arrival

- **Lab Needs**
  - Equipment installation, plumbing, outlets, lab furniture, etc.
- **Office Needs**
  - Keys, ID access, telephone connections, voicemail (if used)
- **Staff Needs**
  - Keys, ID access, lab telephones, moving people in your lab
ONBOARDING
Human Resources

Joanne McCool
Director, Human Resources
mccoolj@email.chop.edu
215-590-6564
# Human Resource Services

<table>
<thead>
<tr>
<th>Before You Arrive</th>
<th>Once You’ve Arrived</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Onboarding</strong></td>
<td><strong>Brian Naughton will connect you to a Talent Acquisition Coordinator (TAC)</strong></td>
</tr>
<tr>
<td>Complete profile, initiate clearances, Make appt. with Occupational Health</td>
<td>-Complete CHOP mandatory education for new employees</td>
</tr>
<tr>
<td>(Clearance takes ± 30 days if smooth)</td>
<td></td>
</tr>
<tr>
<td><strong>Hiring @ CHOP (aka Talent Acquisition / Recruiting)</strong></td>
<td><strong>Brian Naughton</strong></td>
</tr>
<tr>
<td>Bringing current lab staff? Call Brian to move to CHOP-based salary ladder</td>
<td>-Meet Brian to learn of how to post jobs, screen candidates and extend offers</td>
</tr>
<tr>
<td></td>
<td>-Share preferences for sourcing and screening</td>
</tr>
<tr>
<td><strong>Office of Immigration &amp; Visa Services (OIVS)</strong></td>
<td><strong>Jane Kim-Hall</strong></td>
</tr>
<tr>
<td>Does anyone need visa sponsorship to work in the US or have immigration-related</td>
<td>-Learn about visa and green card sponsorship, processing timelines &amp; costs.</td>
</tr>
<tr>
<td>inquiries? Penn &amp; CHOP each have their own OIVS (based on payroll ‘home’).</td>
<td>Individualized training sessions available upon request.</td>
</tr>
<tr>
<td></td>
<td>-Connect with Legal Counsel (if needed).</td>
</tr>
</tbody>
</table>
## Human Resource Services

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| **General Human Resources (HR)**
If you have an HR question or concern and don’t know who to contact, Leon can help you connect with the right person. | Leon Jones w/Maxine Johnson support the Practice Plans Performance management, employee relations, job descriptions and compensation. Connect to / liaison with other HR services. |
| **Organizational Development (OD)**
Unlikely that you’d have an OD need prior to your arrival, but if you can’t connect with who you need, Ruth is accessible for escalation. | Ruth Kilgore New leader support, training & development, talent management, engagement, retreats & in-tact team interventions, organizational analysis, design, etc. |
| **HR Leadership**
Unlikely that you’d have an HR leadership need prior to your arrival, but if you can’t connect with who you need, I’m accessible for escalation. | Joanne McCool You are in very capable hands with the team. I am at your disposal for questions, comments & concerns. |
HR Personnel

Brian Naughton
Lead Talent Strategist
215-360-7441

Leon Jones
Strategic HR Business Partner
267-425-1262

Jane Kim-Hall
Program Manager Immigration Services
267-425-1244

Joanne McCool
Director HR
267-425-1264

Maxine Johnson
Strategic HR Business Partner
267-425-1258

Ruth Kilgore
Sr. Manager HR
267-425-1252
ONBOARDING: Research Information Systems

Michael Schulz
Director, Research Information Systems
schulz@email.chop.edu
267-426-0847

Robert DelCampo
Assistant Director
Research Information Systems
delcampo@email.chop.edu
267-426-1999
Research Information Systems

- Answers to **onboarding questionnaire** will direct RIS leaders to contact you regarding:
  - Web/Applications
  - Systems
  - Devices: relocation and/or requisition
  - Data needs
    - High Performance Compute
    - Retention requirements
      - Including large dataset moves
  - Cloud based project porting
  - Website or Web application porting or development
- Construct solutions tailored to specific needs
- WEB requests: [http://riswebservices.research.chop.edu/](http://riswebservices.research.chop.edu/)
- All other IS requests: [https://apps.chop.edu/careers/for-employees/serviceNow.cfm](https://apps.chop.edu/careers/for-employees/serviceNow.cfm)
ONBOARDING
Sponsored Projects and Research Business Management
SPRBM

Michelle Lewis
VP, Research Administration & Operations
lewism8@email.chop.edu
267-426-3006
Sponsored Projects and Research Business Management

Three teams work to support the pre-award, post-award and incoming/outgoing subaward processing and negotiation on behalf of CHOP Principal Investigators:

- **SPO** = Sponsored Project Officer
  - Helps insure that the PI’s grant application(s) are submitted in compliance with the Sponsor guidelines and CHOP policies

- **RBM** = Research Business Manager
  - Supports PI’s in the management of their research and non-research portfolio’s including cost monitoring and financial closeout of awards
  - Meets with PI’s to determine budgets, salary, and resource allocations for new awards (at proposal stage) and post-award (at JIT and during the active award)

- **Sr. GCS** = Sr. Grant & Contract Specialist
  - Negotiates the incoming and outgoing subaward agreements that support PIs’ collaborations with external institutions
Sponsored Projects and Research Business Management

How can I find out who is my assigned RBM, SPO and/or GCS?

Please visit:  https://sprbm.research.chop.edu/pages/index.php

The online tool is searchable by PI Name, Department or Division
Subject Matter Experts

Michelle Lewis
VP, Research Admin and Operations
lewism8@email.chop.edu [RBMs]

Sara Dubberly
Senior Director Sponsored Projects
Dubberly@email.chop.edu
215-590-6162
[SPOs, GCSs]

Robert Denight
Assistant Director Sponsored Projects
Denight@email.chop.edu
267-426-0310
[SPOs & GCSs]
Office of Research Compliance

- Routine and for-cause quality assurance and monitoring
  - Human subjects research
  - Investigational New Drug (IND) and Investigational Device Exemption (IDE) applications held by CHOP employees
  - Research billing
- Clinicaltrials.gov support
- Export control
- Policy and procedure documentation program
- Research misconduct
Research Safety

- Training programs (Bio, Chem, Lab Safety)
- Assistance with Institutional Biosafety Committee (IBC) protocol submission
- Guidance on lab setup and safety in the lab
- Individual lab consultations (risk assessments)
- Incident response (24/7 on call)

Just ask! Research Safety Department
ResearchSafety@email.chop.edu
267-426-2272 (6-2272)
Institutional Animal Care and Use Committee (IACUC)

Laurence Eisenlohr, VMD, PhD, Chair
eisenlohr@email.chop.edu
215-590-0952

Judith Grinspan, PhD
Deputy Chair
grinspan@email.chop.edu
215-590-2094

Gordon Barr, PhD
Deputy Chair
barrg@email.chop.edu
267-426-9722

Denise Ancharski-Stutler, MS, CPIA
IACUC Administrative Director
AncharskiStutlerD@email.chop.edu
267-425-0145

Mike Padron, MS, CPIA
IACUC Analyst
padronm@email.chop.edu
267-425-2112

Rebecca Spangenberg, MS, CPIA, LATG
IACUC Post-Approval Monitor
spangenber@email.chop.edu
267-425-1925
CHOP Onboarding for the Animal User

Onboarding questionnaire
For animal use = YES

Training:
- AALAS On Line Learning Library
- Occupational Health and Safety Risk Assessment (annual)
- DVR hands on training

Meet with Facilities Director (L. Stewart) to discuss space needs

Meet with IACUC Chair (L. Eisenlohr and Office Director (D. Ancharski-Stutler) to discuss protocol submission

Complex Protocol or USDA Species: Meet with Attending Veterinarian (L. Stewart) or designated clinical veterinarian

Protocol Submission
IACUC

• Two functions
  • Ensure compliance with laws, regulations and policies.
  • Ensure the welfare of animals used in research, testing or teaching.

• Responsibilities include
  • Review and Approve research protocol and proposed changes to protocols.
  • Semi-annual inspection of animal facilities; review of animal care and use program.
  • Investigate complaints about animal care and use.
  • Suspend animal use activities.
  • Provide written reports to and advise the Institutional Official.
PROTOCOL REVIEW

- Four mechanisms for review
  - Full Committee Review (FCR)
  - Designated Member Review (DMR)
  - Administrative Review
  - Veterinary Verification and Consultation (VVC)

[Diagram of protocol review process]
Faculty Affairs & Professional Development (FAPD)  
Perelman School of Medicine

• Oversees the recruitment and appointment, promotion, and retention of distinguished faculty.
• Offers professional development programs and support in career development, clinical skills, leadership and management, teaching, and research and scholarship.
• Promotes professionalism, well-being, and resilience.

Victoria A. Mulhern  
Executive Director  
vmulhern@upenn.edu

Stephanie Taitano  
Associate Director  
staitano@upenn.edu

Kim Haebel  
CHOP Faculty Coordinator  
khaebel@upenn.edu
This site is designed to be a portal for PSOM faculty to find professional development offerings, resources, and benefits from the university, school, and health systems.

- Tenure View more
- Clinician Educator View more
- Research View more
- Academic Clinician View more
One-on-one meetings to welcome new CHOP faculty

- Provide names and describe roles of people who can help with academic career aside from your assigned Mentor and your Chair/Chief
- Suggest potential research collaborators
- Show OFD Website [https://ofd.research.chop.edu](https://ofd.research.chop.edu)
  - Samples of successful CHOP-authored grants (K-, R-, P- and U-type funding) and templated language for Resources
  - *Funding Forecaster* with upcoming funding opportunities. Also sent monthly via email
  - Internal (CHOP/Penn) and external (AAMC, Harvard) professional development sessions

Mary Blitzer Field
Assistant Director
267-426-9334
FUNDING FORECASTER: Opportunities and Deadlines

Grants with recurring and rolling deadlines

Specific month/day deadlines for the current academic year are provided if they have been released. Otherwise, grants are listed by the month when they fell due last year.

- Summary of Pilot Grants (Internal CHOP/Penn pilot grants)
- Summary of Limited Application grants (restricted number of applications per institution)
- NIH Monthly Deadlines (Rolling calendar for the next 12 months)
- RWJ Evidence for Action to "build evidence regarding the population health, well-being, and equity impacts of specific policies, programs and partnerships." (Rolling deadlines for Letters of Intent (LOIs))
- Thrasher Awards "for research that offers substantial promise for meaningful advances in the prevention and treatment of children’s diseases." (Rolling deadlines)

Federal funding announcements by release date

Generally, letters of intent (LOIs) are due a month after release dates, and applications are due two months after release dates.

- NIH Weekly Funding Announcements
- Recent NIH requests for applications (RFAs)
Office of Postdoctoral Affairs

• Provides opportunities for research trainees to participate in career and professional development programming (CHOP, Penn Biomed Postdoc Program/Career Services)
• Administers the Diversity Fellowship for postdocs
• Supports trainees with one-on-one career counseling and grant development resources

Schedule a chat with Dave Taylor, Assistant Director, to find out more about how we can support your research group

Wendy Reed Williams, PhD
Director
williamsw@email.chop.edu
215-590-5140

David Taylor, PhD
Assistant Director
taylord@email.chop.edu
267-426-0220
Responsible Research Training

• Training Requirements:  Training Wizard
• Orientation Resources:  Getting Started
• Pipeline Programs
• Building Community

Wendy Reed Williams, PhD
Director
williamsw@email.chop.edu

Jodi Leckrone
Assistant Director
Leckrone@email.chop.edu
Department of Veterinary Resources

Laike Stewart, DVM, DACLAM
Senior Director and Attending Veterinarian
stewartl3@email.chop.edu
267-426-2253

- Professional and para-professional staff who provide veterinary, technical, regulatory and research-related expertise
- Provide administrative, scientific, and veterinary review of protocols
- Provide daily oversight and care for research animal colonies
  - USDA and non-USDA covered species
  - Colket Translational Research Building, Abramson Research Center
- Enable, support and facilitate animal-based research
Institutional Review Board (IRB)

Barbara Engel, MD, PhD
Chair

267-426-6859
engelbc@email.chop.edu
IRB Resources

- IRB webpage [https://irb.research.chop.edu/](https://irb.research.chop.edu/)
  - What must be reviewed by the IRB [https://irb.research.chop.edu/what-must-be-reviewed-irb](https://irb.research.chop.edu/what-must-be-reviewed-irb)
  - Protocol and Consent Templates [https://irb.research.chop.edu/forms](https://irb.research.chop.edu/forms)
  - SOPs [https://irb.research.chop.edu/policies](https://irb.research.chop.edu/policies)
  - Contact [https://irb.research.chop.edu/contact](https://irb.research.chop.edu/contact)

- IRB Help line (215-590-2830) [IRBoffice@email.chop.edu](mailto:IRBoffice@email.chop.edu)

- IRB Office Hours – 4 times per month on Thursday afternoons and Friday mornings (no appointment required – call Help line for schedule)

- Meet with the Director, Assistant Director or one of the IRB chairs
“Conflict of interest” refers to situations in which financial or other personal considerations may compromise, or have the appearance of compromising, an individual’s professional judgment.
CHOP COI Requirements

• Types of conflicts:
  • Clinical (outside interests may affect prescribing practices or clinical decision-making)
  • Purchasing (outside interests may affect decision-making with respect to purchasing or vendor relations)
  • Commitment (outside commitments may conflict with primary obligations to CHOP or with CHOP’s mission)
  • Research (research has potential to be biased as a result of outside interests – both those of the individual and of the Institution)
eCOI Electronic Disclosure System

- Online disclosure system
  - Part of eResearch – interacts with eIRB, eSPA, eAgreements
  - COI review required aspect of IRB approval, acceptance of funds, and approval of agreements

- Annual/Primary Disclosure Form
  - Required once per year in February
  - Reviewed by Department Chair/VP and COI Office

- Project-specific Disclosure Form
  - Pulls information from Annual/Primary form
  - Required for each specific project
  - Helps COI Office determine whether project could affect interest
  - Reviewed by COI Office and Conflict of Interest Committee (if necessary)
COI Resources

• Conflict of Interest Office\Office of Compliance and Privacy
  • 267-426-6044
  • COI@email.chop.edu

• Intranet: http://intranet.chop.edu/sites/compliance/conflict-of-interest/
• Anonymous Reporting of Compliance Concerns: 1-866-246-7456 or www.mycompliancereport.com (enter CHOP when prompted for institution access code)
Clinical Research Support Office

Richard Aplenc, MD, PhD, MSCE
AVP & Chief Clinical Research Officer
aplenc@email.chop.edu
267-426-7252

Senior Director, CRSO
(To be determined)

215-590-0574
ClinResearchSupport@email.chop.edu
The CRSO Team

• Research Staffing
  • Clinical research personnel to assist with start-up and execution of projects, and ensure compliance

• Clinical Trials Support
  • Industry contracting support
  • Support for management of trial using OnCore
  • Trial budget preparation

• Recruitment support/consultation for clinical research studies

• IND/IDE support for sponsor investigators
Other Clinical Research Resources

• UPENN Biostatistics Faculty Support
  • Justine Shults, PhD, lead biostatistician
    shultsj@email.chop.edu

• Westat Biostatistics and Data Management Core (BDMC)
  https://bdmc.research.chop.edu/contact.php
  • (240) 654-2869 or (267) 426-7201
    • Biostatistics support
      • Study design, power calculations, analytic plans for grant applications
    • Data management services
      • Database development and maintenance
      • Preparation data for FDA submission
Office of Technology Transfer (OTT)

Zev Sunleaf, Vice President, OTT
sunleafs@email.chop.edu
267-425-3029
Office of Technology Transfer (OTT)
Moving Breakthroughs from Bench to Bedside


Competitive intelligence

Review prior art and business case.

Communicate

Patent and market.

Funding

Partner and license.

Protect IP

Outreach

Impact
OTT: Intellectual Property and Licensing Group

• Manage the intellectual property (IP) of inventions (i.e. patents and copyrights) from the research institute and hospital
  • Make patent filing decisions based on prior art and business case
• Work with inventors to market technologies to find licensees and sponsored research opportunities
• Negotiate the terms of license agreements
OTT: Contracts Group

• Facilitate the research and collaboration of CHOP’s faculty, research, and hospital staff in the preparation, review, and negotiations of certain research agreements, such as:
  
  • Collaboration agreements with corporate and/or academic partners;
  
  • Non-disclosure/confidentiality agreements to discuss potential collaborations;
  
  • Transfer agreements to receive or send materials and data; and consortium agreements

• To learn more about the Office of Technology Transfer, visit Office of Technology Transfer Website
CHOP RI Cores

- The CHOP Research Institute Cores provide state-of-the-art technologies, technical expertise and education to facilitate discovery, and support the research missions of our investigators

https://www.research.chop.edu/research/chop-research-core-facilities

Harry Ischiropoulos, PhD
Scientific Director for Cores
215-590-5320
ischiro@mail.med.upenn.edu
Abramson Pediatric Research Building (ARC)

- Flow Cytometry Core (FCC)
- Metabolomic Core (MB)
- Nucleic Acid and PCR Core (NAP)
- Pathology Core (PC)
- Protein and Proteomics Core (PPC)
- Translational Lab Core (TLC)
- Aquatic Zebrafish Core

Colket Translational Research Building (CTRB)

- Biostatistics and data management core (BDMC)
- Small animal imaging facility (SAIF)
- High Throughput Sequencing Core (HTS)
- Transgenic Core (TC)
Grant Review Groups

Grant Proposal Success (GPS) programs:
Matthew Weitzman
(weitzmanm@email.chop.edu)

Neuroscience: Michael Robinson
(robinson@mail.med.upenn.edu)

Cell Biology: Janis Burkhardt
(BURKHARDT@email.chop.edu)

Pediatrics Advisory Committees:
Basic: Matthew Weitzman
(weitzmanm@email.chop.edu)

Translational: Garrett Brodeur
(Brodeur@email.chop.edu)

Clinical: Theo Zaoutis
(ZAOUTIS@email.chop.edu)
Grant Review Communities

- **Pediatrics K and R Advisory Committees**
  - Review of basic and clinical proposals for K and R applications to NIH

- **Neuroscience Grants Club**
  - Reviews Rs, Ks, Fs, and private foundation grants; clinical and basic research in neuroscience
  - Attendees include senior faculty, junior faculty, fellows, & post-doctoral fellows

- **Cell Pathology Grants Club**
  - Reviews basic research grants at concept stage
  - Attendees include senior and junior faculty from Pathology

- **Grant Proposal Success Groups**
  - Programs that help in preparation and review of grant proposals
  - Learning and networking opportunity for investigators across campus
  - Federal (NIH, DOD), Foundations and Internal grants
  - Peer-to-peer support as well as senior faculty
  - Regular sessions and ad hoc committees for K and R grants
THANK YOU!

Also Visit: 
Getting Started at the CHOP RI and the New to CHOP links on the Research Institute intranet

on the Office of Faculty Development web site