NEW FACULTY ONBOARDING

CHOP Research Institute
August 23, 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

• Post-arrival assistance
• Human Resources
• Research Information Services
• Business Administration (grants and contracts)
• Faculty Affairs and Professional Development Office at Penn
• Office of Faculty Development at CHOP Research Institute
• Academic Training and Outreach Programs (ATOP)
• 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
• Research Institute 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

I am here! How do I..........?
ONBOARDING: Post Arrival

- Establish a “punch list”
  - These are the items that need to be taken care of in order to make sure you are up and running as quickly as possible
- Are there equipment purchases that need to be made right away?
  - Infrastructure, tele/data
- One stop shopping for anything new for the lab
  - Keys
  - Lockers
  - Security
ONBOARDING: Post-arrival

• Lab Needs
  • Equipment installation, plumbing, electrical outlets, lab furniture, etc.
• Office and Staff Needs
  • Keys, ID access, telephone connections, voicemail (if used), moving employees within your space
• Archibus- CAFM database
• Space Requests
• Facilities Help Desk (4-1046)
• IT Help Desk (4-4357)
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]
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 development contact Scott Glasser
  GlasserS@email.chop.edu
- Construct solutions tailored to specific needs
- WEB requests: http://riswebservices.research.chop.edu/
- All other IS requests: https://apps.chop.edu/careers/for-employees/serviceNow.cfm
HUMAN RESOURCES

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

## Before You Arrive

<table>
<thead>
<tr>
<th>Onboarding</th>
<th>Once You’ve Arrived</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete profile, initiate clearances, Make appt. with Occupational Health (Clearance takes ± 30 days if smooth)</td>
<td>Brian Naughton will connect you to a Talent Acquisition Coordinator (TAC)</td>
</tr>
<tr>
<td>-Complete CHOP mandatory education for new employees</td>
<td></td>
</tr>
</tbody>
</table>

## Hiring @ CHOP (aka Talent Acquisition / Recruiting)

<table>
<thead>
<tr>
<th>Hiring @ CHOP (aka Talent Acquisition / Recruiting)</th>
<th>Once You’ve Arrived</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bringing current lab staff? Call Brian to move to CHOP-based salary ladder</td>
<td>Brian Naughton</td>
</tr>
<tr>
<td>-Meet Brian to learn of how to post jobs, screen candidates and extend offers</td>
<td></td>
</tr>
<tr>
<td>-Share preferences for sourcing and screening</td>
<td></td>
</tr>
</tbody>
</table>

## Office of Immigration & Visa Services (OIVS)

<table>
<thead>
<tr>
<th>Office of Immigration &amp; Visa Services (OIVS)</th>
<th>Once You’ve Arrived</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does anyone need visa sponsorship to work in the US or have immigration-related inquiries? Penn &amp; CHOP each have their own OIVS (based on payroll ‘home’).</td>
<td>Jane Kim-Hall</td>
</tr>
<tr>
<td>-Learn about visa and green card sponsorship, processing timelines &amp; costs. Individualized training sessions available upon request.</td>
<td></td>
</tr>
<tr>
<td>-Connect with Legal Counsel (if needed).</td>
<td></td>
</tr>
</tbody>
</table>
# Human Resource Services

<table>
<thead>
<tr>
<th>Before You Arrive</th>
<th>Once You’ve Arrived</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Human Resources (HR)</strong></td>
<td></td>
</tr>
<tr>
<td>If you have an HR question or concern and don’t know who to contact, Leon can help you connect with the right person.</td>
<td>Leon Jones w/Maxine Johnson support the Practice Plans</td>
</tr>
</tbody>
</table>

**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
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
Matthew Hodgson  
AVP, Research Compliance & Regulatory Affairs  
hodgsonm@email.chop.edu  
267-426-8723

Karen Burke  
Assoc Director, Research Compliance  
burkek6@email.chop.edu  
267-425-2447

Denise Melvin  
Director, Research Safety Programs  
melvind@email.chop.edu  
267-426-7597

Katina Frangakis  
Manager, Shipping Core  
frangakisk@email.chop.edu  
267-425-2079

Denise Ancharski-Stutler  
Admin Director, Office of IACUC Administration  
ancharskistutlerd@email.chop.edu  
267-425-0145

Amy Schwarzhoff  
Director, Human Subjects Research  
schwarzhoffa@email.chop.edu  
267-426-2346

Adam Motsney  
Supervisor, Investigational Drug Service  
motsneya@email.chop.edu  
215-590-1789
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)
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

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

Onboarding questionnaire
For animal use = YES

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

Protocol Submission

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

- 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
  - https://intranet.research.chop.edu/display/laboratorylas

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

Senior Director and Attending Veterinarian
Laike Stewart, DVM, DACLAM

Assistant Director, Husbandry and Operations
Pam Straeter, RLATG, CMAR, MS

Animal Facility Supervisor (ARC)
Curtis Pannell, ALAT

Animal Facility Supervisor (CTRB)
Byrnone Page, ALAT

Assistant Director, Quality Assurance and Regulatory Support
Travis Seymour, VMD, DACLAM

Assistant Director, Clinical Care and Scientific Training
Dorian Culmer, DVM, DACLAM

Sr Research Veterinarian
Katharine Tuohy, VMD

Sr Research Veterinarian
Geary Chip Smith, DVM, MS

Sr Administrative Business Mgr
Christina Massey, MBA

Business Administrator
Michelle Sanders, MBA

Quality Assurance Specialist-DVR
Amy Lewis, AS, LATG
Dominique Nicole Divaccaro, MLAS, LAT

Training Specialist
Jillian Hash, BS, LATG

Revised 8/8/2018
INSTITUTIONAL REVIEW BOARD (IRB)

Not Research

Exempt

Exempted Research

Not Human Subjects Research

Expedited Review

Human Subjects Research

Full Board Review

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
CHOP CONFLICT OF INTEREST (COI) PROGRAM

“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.

Janet Holcombe  
Vice President, Chief Compliance and Privacy Officer  
267-426-6037  
holcombej@email.chop.edu

Patrick Egan, Esq.  
Senior Manager of Compliance Operations  
267-426-6049  
eganp@email.chop.edu
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/
• Policy:
• Standard Operating Procedures:
  http://intranet.chop.edu/system/galleries/download/patcare/standard_operating_procedure.pdf
• Anonymous Reporting of Compliance Concerns: 1-866-246-7456 or
  www.mycompliancereport.com (enter CHOP when prompted for institution access code)
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, scholarship and teaching.
- 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
Faculty Life & Professional Development Program within the FAPD Office

http://www.med.upenn.edu/flpd/

Among many Faculty Life & Professional Development offerings are workshops and resources relating to the four full-time academic tracks:

- Tenure [View more]
- Clinician Educator [View more]
- Research [View more]
- Academic Clinician [View more]
OFFICE OF FACULTY DEVELOPMENT (OFD)
CHOP Research Institute

- Onboarding session
- One-on-one meetings to welcome new CHOP faculty
- New assistant professor gatherings for networking and discussing topics of shared interest
- Research Institute pilot grants
- Monthly Funding Forecaster
- Office of Faculty Development web site
- Annual Report on Faculty Demographics

Mary Blitzer Field, MPhil, Assistant Director
CHOP Res Inst Office of Faculty Development
fieldm@email.chop.edu; 267-426-9334
Office of Faculty Development
Research Institute Pilot Grant Programs

• Jr. Investigator Pilot Grants
  ▪ Supports work of Jr. Faculty (within 1-4 years of appt) with a new mentor outside of current mentor to expand on needed expertise

• K-Readiness Pilot Grants
  ▪ For Sr. Fellows and Instructors
    o Provides salary support for staff that can assist with the research objectives of the trainee

• Basic-Clinical Pilot Grants
  o To support new collaborations between basic and clinical researchers to advance translational science
FUNDING FORECASTER
_Distributed the first Tuesday of every month_

- Funding opportunities emailed by Office of Faculty Development to all Tenure, C-E and Research track faculty
  - Summary of CHOP/Penn Pilot and Limited Application grants
  - Recent NIH RFA’s and PAR’s. DoD programs
  - Calendar of foundation and association grants
ACADEMIC TRAINING AND OUTREACH PROGRAMS (ATOP)

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

**Academic Training**
- Career and Professional Development
- Support for Researchers-in-Training

**Outreach Programs**
- STEM Pipeline Programs, Community Engagement and Research Training Oversight

**Specialty Programs and Diversity**
- Workforce Diversity and Development of Discipline-Specific Research Programs and Pilot Grant Opportunities
**Academic Training**
- [Trainee Portal](mailto:) for Early-Career Researchers
- Penn Program Liaison (BPP, Career Services)
- One-on-one Career Counseling
- Postdoc Affairs Administration
- [Research Trainee Advisory Committee](mailto:)

David Taylor, PhD
taylord@email.chop.edu
267-426-0220

**Outreach Programs**
- [Training Wizard](mailto:)
- [CRISSP](mailto:) Undergraduate Research Internship
- CHOP-RISES High School Internship
- Symposia and Community Events
- [Research Education Programs Advisory Committee](mailto:)

Jodi Leckrone, MEd
leckrone@email.chop.edu
215-590-7605

**Specialty Programs and Diversity**
- [Diversity Postdoctoral Fellowship](mailto:)
- Liaison with CHOP Office of Diversity and Inclusion
- Administration of the Masters of Translational Research, Entrepreneurial Science Program
- [Diversity Fellowship Advisory Committee](mailto:)

Paulette McRae, PhD
mcraep@email.chop.edu
267-425-2168
Office of Technology Transfer (OTT)
Office of Entrepreneurship & Innovation (OEI)
Office of Collaboration & Corporate Research Contracts (OCCRC)

Zev Sunleaf, Vice President, OTTCI
sunleafs@email.chop.edu
267-425-3029
OTT: IP and Licensing

- Manage the intellectual property (IP- i.e. patents and copyrights) created across CHOP
  - Make patent filing decisions based on prior art and business case
  - Bring research from bench to bedside
- Work with inventors to market technologies and find licensees and partners
- Negotiate license and option agreements
- Distribute income

https://www.research.chop.edu/office-technology-transfer-commercialization-innovation
OCCRC: Research Contracts

• New office to provide single stop for research contracts, clinical trials and collaboration with industry
  • Collaboration and research (unfunded) agreements (CRA) with corporate and/or academic partners and consortiums
  • Industry sponsored clinical trials (CTA) or sponsored research agreements (SRA)
  • Non-disclosure/confidentiality agreements to discuss potential collaborations (CDA/NDA);
  • Transfer agreements to send or receive materials (MTA) and data (DUA, BA)
  • Personal consulting agreements
OEI: Entrepreneurship & Innovation

- Create a culture of innovation at CHOP
- Identify and elevate innovative solutions that lead to:
  - New licensing opportunities
  - New startup companies
  - New business lines and solutions for CHOP
- Provide support for development of CHOP innovations

https://www.chop.edu/centers-programs/office-entrepreneurship-and-innovation
CHOP RESEARCH INSTITUTE 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
ischirop@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)

- Small animal imaging facility (SAIF)
- Transgenic Core (TC)
GRANT REVIEW COMMUNITIES

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

• Neurology Affinity Group 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
  • Peer-to-peer support (includes experienced 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