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Pricing and Charging

Process



- Establish a framework for the pricing and charging for access to equipment under the N8 Equipment Sharing agenda
- Academic and Administrative membership from all N8 partners
- WG Meetings held during 2013 excellent attendance and input
- Further Consultation
- Lots of issues identified and worked through
- Approach through adoption of Key Principles

Key Principles



- Simple and Transparent
- Approved by Funders
- Non-Bureaucratic
- Initiative is based on Efficiency
- Need to find a solution without creating whole new bureaucracy
- Needs to be practical and manageable

Simple - Band Approach



Band 1 – New Infrastructure Framework Applies

 Strategic Facilities as defined by N8 Universities that are part of the competitive award winning process and research growth of the 8 universities

Band 2 – New Infrastructure Framework Optional Larger pieces of equipment where formal/informal sharing may already exist as a result of collaborative working.
 Equipment with the capacity and capability to be shared.
 For this equipment uptake of the model is optional

Band 3 – New Infrastructure Framework Unlikely to apply

 Smaller equipment that does not lend itself to sharing and identified via the new N8 database

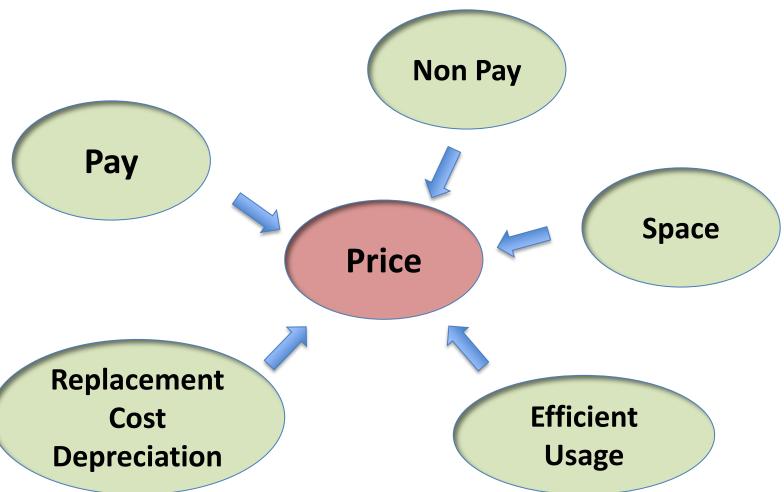
Transparent - Cost Model



- Transparent Approach to Costing (TRAC)
- TRAC Research Facility Model
 - Established costing tool for the sector
 - Approved by Funders
 - Cost models built up over time
 - Agreement on principles
- Involvement of TRAC Support Desk
- TRAC Practitioners Guide to Equipment Sharing
- Full TRAC guidance review will look at facilities

Elements of Cost Model





http://www.n8research.org.uk/asset-collaboration/n8-est/

Approved by Funders



- Established cost model for sector
- Involvement of TRAC Support Unit throughout process
- Liaison with RCUK representatives through TRAC Development Group route
- Check other funder T & Cs

Charging Pathways



<u>University A</u> requires access to equipment as part of a research project. Access will be provided by Universities B and C. Costs are recorded as Research Expenditure in University A

<u>University C</u> is a subcontractor on the research project led by University A. This includes collaborations where research income is routed via a lead University

Equipment **is not** a Facility under TRAC therefore costs <u>are</u> included in the overhead rates for research

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University B is not a

subcontractor on the project. Equipment access is simply being provided. This includes research collaborations with separate funding streams.

Equipment may or may not be a Facility under TRAC

Costs on the grant at
University C do include
academic staff and therefore
some overhead

Costs on the grant at University C do not include academic staff and therefore no overhead

Access Charge NOT Levied. This is the only scenario where any costs towards running the equipment are recovered as part of this research project by the University providing access to the equipment

Access Charge Levied Research Incomewhere participating in the research Other Income where not participating in the research Access Charge Levied

Research Incomewhere participating in
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Other Income where
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research

Access Charge Levied-*Other* Income

http://www.n8research.org.uk/asset-collaboration/n8-est/

Toolkit



- Band Approach
- Charging Pathways Flowchart
- Cost Elements and Key Points to Note
- Cost Model Example
 - Notes
 - Main Costing Summary
 - Staff Analysis
 - Replacement Cost Depreciation
 - Space
 - Efficient Usage
- Leeds / MRC asset lives
- Frequently Asked Questions

Key Messages



- No requirement for TRAC facility status to charge
- No rush to change basis for costing and TRAC facility status-assess whether this works for that area as before
- Toolkit is there to help not to impose
- FAQs really help so raise questions so that we can include them and others might benefit!

Next Steps



- TRAC Development Group guide on progress with Equipment Sharing
 - TRAC Support Unit liaising with RCUK on principle of including depreciation
 - Consultation on revised TRAC guidance
- Identify new sharing possibilities
- Promote toolkit
- Ongoing update FAQ resource

Contacts



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