

Case Study: Transforming Biomedical Research Cores at UofL

University of Louisville

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Philanthropic Investment and Core Facilities

- Aaron Larson
- Sara McArdle
- Rand Haley (Chair)

UofL Research Enterprise

- ~ \$225M Research Expenditures
- ~ 80% Biomedical Sciences
(also: Engineering, A&S, ...)
- ~ 20-25 Cores (Decentralized)
- Kentucky: EPSCoR / IDeA

Jewish Heritage Fund awards \$3 million to University of Louisville

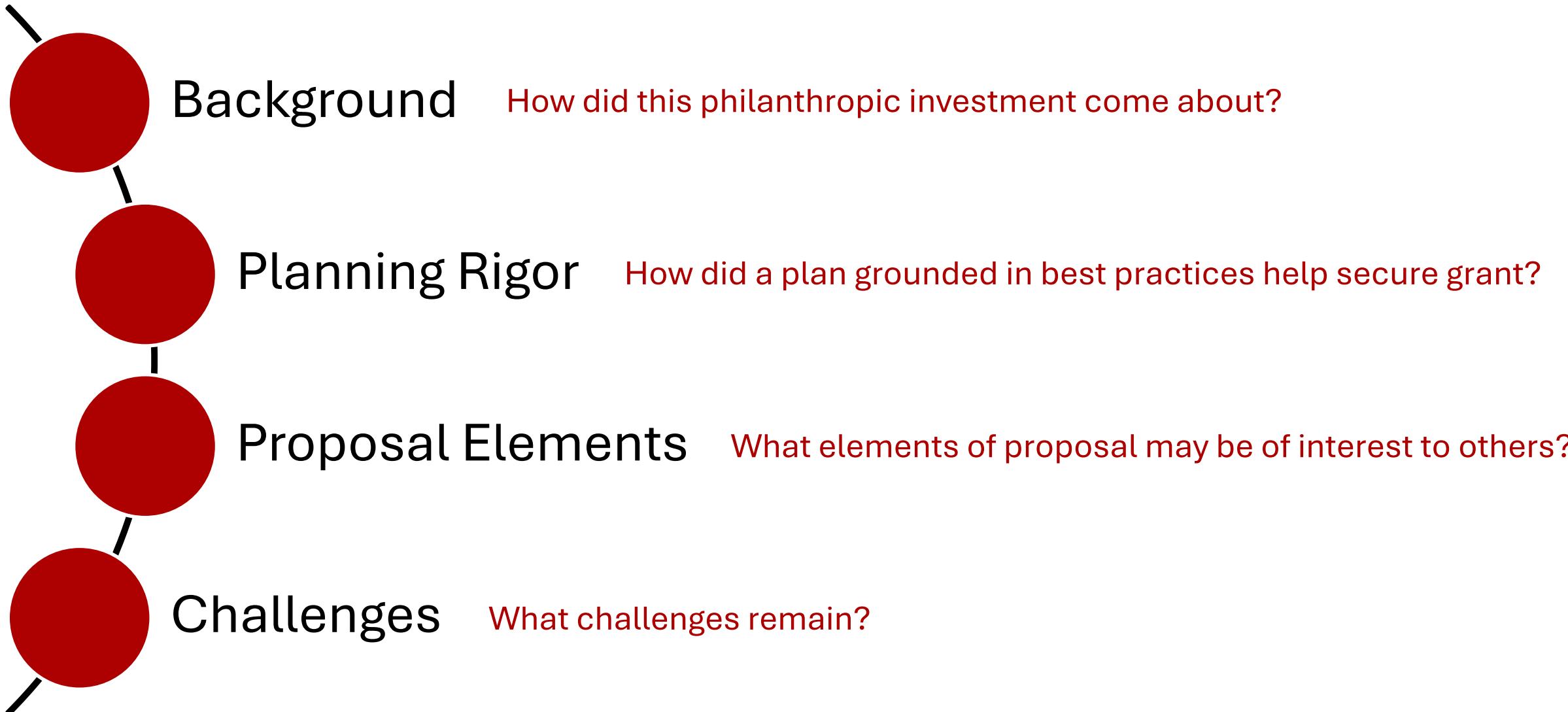
\$3M / 3 years

The University of Louisville (UofL) has announced a \$3 million grant from the Jewish Heritage Fund (JHF), to support the university's science and biomedical research infrastructure.

The funding will bolster UofL's core lab facilities, providing researchers campus-wide with access to advanced equipment and skilled personnel to help accelerate discovery and innovation focused on the development of new diagnostics, treatments, and medical breakthroughs.

Source: *Philanthropy News Digest*, <https://philanthropynewsdigest.org/news/jewish-heritage-fund-awards-3-million-to-university-of-Louisville>.







Jewish Heritage Fund

- Grantmaking organization in Louisville, KY
- Established in 2012 as a **health conversion foundation**, from the sale of Jewish Hospital¹

- 1903: Jewish Hospital established
- 1943: Jewish Hospital / UofL partnership begins
- 2012: Jewish Hospital sold → JHF established
- 2019: UofL purchases Jewish Hospital

- ~ \$100M granted to 110+ non-profit organizations

Health Conversion Foundations in the U.S.²

- Formed with proceeds from M&A of nonprofit health care entities
- ~ \$1B in grant funding awarded annually
- 300+ of these foundations established
- Operate in 43 states
- \$26B+ in combined assets (2010)

“Although this figure may not seem so impressive on a national scale, health legacy foundations can have an enormous impact at the community level. Most of these funders originated from a nonprofit hospital and restrict their giving to one or two counties, frequently mirroring the hospital’s service area.”

Sources: 1. Polson, J. (2024) Why Philanthropy is Critical to Research Funding: A Local Grantmaker’s Perspective. Keynote at MWACD 2024 Annual Meeting, Louisville, KY.

2. Niggel, SJ. (2014) Funding Social and Economic Interventions to Improve Health: Health Legacy Foundation Strategies. *Health Affairs Forefront*, <https://www.healthaffairs.org/do/10.1377/forefront.20141124.043002/full/>.

JHF Vision:

Metropolitan Louisville and the region will be a community of excellence characterized by improved health, **world-class medical research**, and a robust, dynamic Jewish community.

Evolution of JHF's Funding of Research at UofL

2013 - 2017

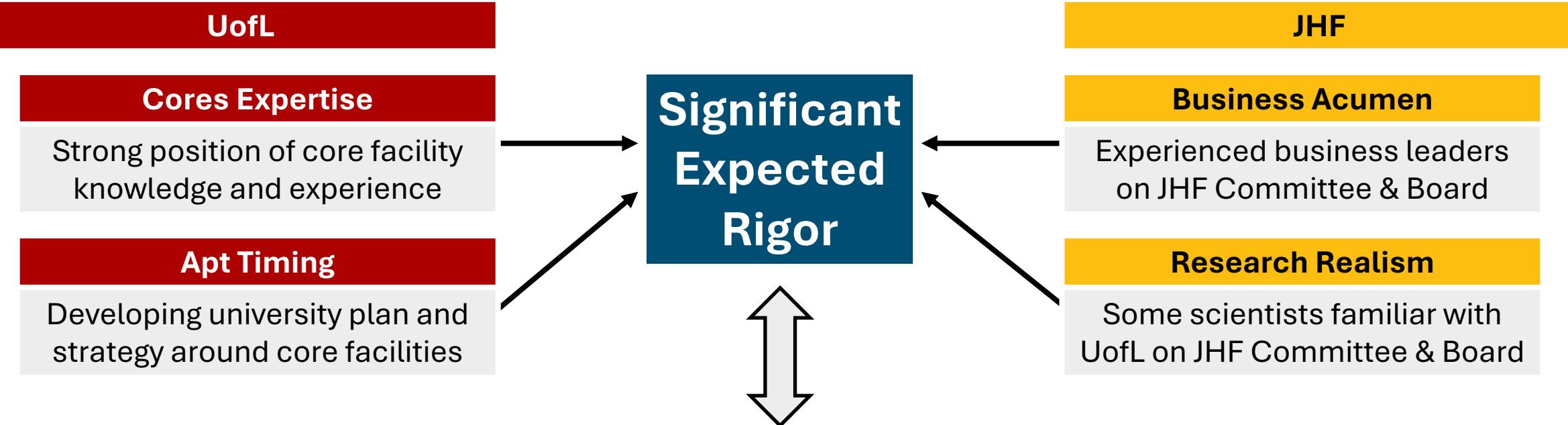
2018 - Present

Individual Research Projects

Research Infrastructure Investments (to enhance NIH funding)

- Start-up funds for new faculty
- Competitive bridge grants
- Support for new instruments (faculty)

Schematic Timeline:



- Specifics and details throughout our plan & proposal
- Documented evidence (best practices & lessons learned)
- Expectations for a ‘business plan’ and financial pro forma
- Link to an overall university direction and plan that is sufficiently compelling (and supported by best practices)

1. Rigor and Compelling Approach

- Links to external environment – e.g., how other institutions are:
 - Addressing core management and strategy
 - Building and operating effective ‘coordinated support infrastructures’ for cores (given limited funds)
- Business plan (e.g., financial pro forma with JHF & UofL investments)
- Compelling case – how to drive improvement in university cores:
 - **Louisville Research Cores**

Louisville Research Cores (LRCs)

- Aspirational yet attainable subset of core facilities
- Pursue and achieve a special university designation aligned with best practices in core operations, management, and strategy

2. Clear Investment Aims and Mechanisms

- Linked to observed best practices and lessons learned

→ See next slide

3. Performance Assessment and ROI

Specific Aims	Mechanisms	Annual (JHF)
Aim 1. Investment in Strategic Staff and Equipment within LRCs	Mechanism 1a – Strategic Investments in LRC Equipment Acquisition	\$325k
	Mechanism 1b – Strategic Investments in LRC Operating Subsidies	\$325k
Aim 2. Investment in UofL Coordinated Support Infrastructure for Core Facilities	Mechanism 2a – Coordinated Support Infrastructure	\$0
	Mechanism 2b – Core Management Software Solution	\$100k
	Mechanism 2c – Professional Development Opportunities for LRC Staff	\$25k
Aim 3. Investment to Incentivize LRC Use and Engagement	Mechanism 3a – Vouchers to Incentivize LRC Use by UofL Researchers	\$100k
	Mechanism 3b – Vouchers to Incentivize Faculty/Units to Integrate Equipment into LRCs	\$100k
	Mechanism 3c – Vouchers to Incentivize LRC Use by Regional Innovation Ecosystem	\$25k

Positives

- Aligned Strategy + JHF Grant/Plan
- Funding: Internal + External
- University Leadership Commitment
- Accelerated Interest in LRC Pursuit

**NEW
EXPECTATIONS**

**NEW
BENEFITS**



Remaining Challenges

- Making significant, rapid investments in cores and the cores ecosystem with sufficient demonstrated, strategic justification

Stewardship

- Affecting major culture change without direct control and remaining incentives that reinforce the status quo

Persuasion

- Funds only go so far in stimulating core leadership's inner drive (and pace) to improve & recognition that core operations and management may be suboptimal relative to best practices

Motivation

Panel Q&A

Philanthropic Investment and Core Facilities

