

Case Study: Transforming Biomedical Research Cores at UofL

University of Louisville

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Philanthropic Investment and Core Facilities

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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

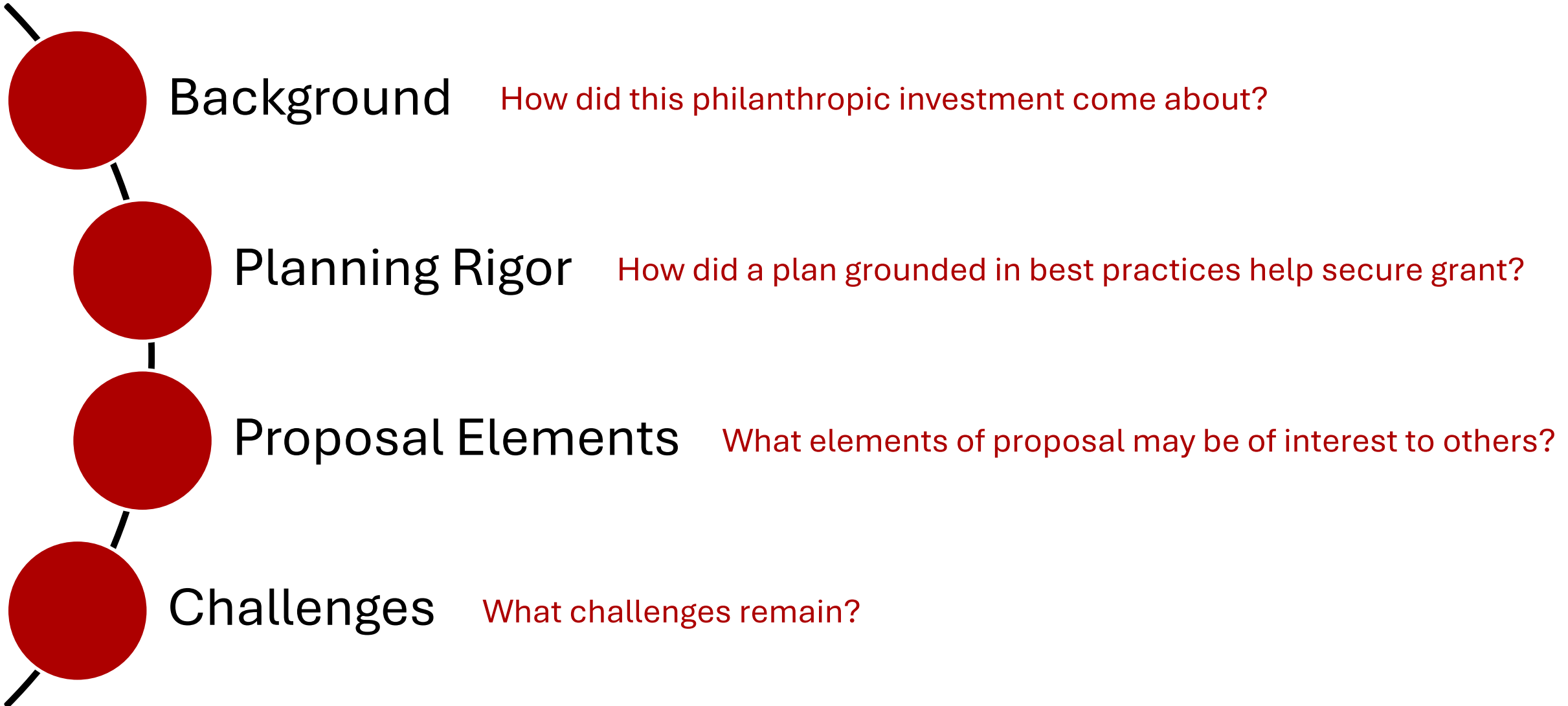
The University of Louisville (UofL) has announced a \$3 million grant from the Jewish Heritage Fund (JHF), to support the university's science and biomedical research infrastructure.

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>.

What is unique (or interesting)?

1. Magnitude of the investment
2. Alignment with an institution level core facilities program





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.”

Background

How did this philanthropic investment come about?



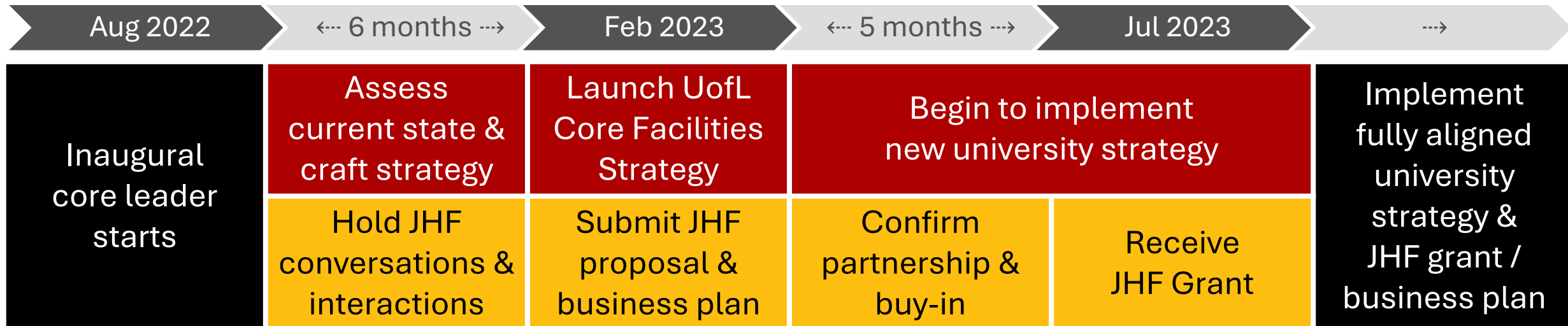
JHF Vision:

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) <ul style="list-style-type: none">• Start-up funds for new faculty• Competitive bridge grants• Support for new instruments (faculty)

Schematic Timeline:



UofL

Cores Expertise

Strong position of core facility knowledge and experience

Apt Timing

Developing university plan and strategy around core facilities

Significant Expected Rigor

JHF

Business Acumen

Experienced business leaders on JHF Committee & Board

Research Realism

Some scientists familiar with UofL on JHF Committee & Board

- 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**

2. Clear Investment Aims and Mechanisms

- Linked to observed best practices and lessons learned

3. Performance Assessment and ROI

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

→ See next slide

Proposal Elements

What elements of proposal may be of interest to others?



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



MARCH 23 - MARCH 26

Horseshoe Las Vegas Hotel, Las Vegas, NV

