



LUCAS
Lakehead University Center for
Analytical Services

LUCAS Membership Guidelines

[September 7, 2016]

What is LUCAS?

The Centre for Analytical Services is an internal, Lakehead University support structure designed to enhance research while providing regional access to the university's analytical testing facilities and other services.

LUCAS ACCOUNTS

- On acceptance into LUCAS, a research account will be setup for use under the signing authority of the member. The Director of LUCAS will have viewing privileges. Management and control of the laboratory remains with the developer of the service. Funds generated stay within the unit that generated the revenues. The account will have an object code of 46802 for INCOME. LUCAS, like other research accounts, have carry forward. Appropriate use of funds would include technician salaries, supplies and equipment for testing needs and repair costs.
- There is an account used separately for LUCAS administration and office functions.

LUCAS ADMINISTRATION

Operating funds comes from fees collected during invoicing. The fees are determined by the Vice President Research on recommendation from the Director of LUCAS. They are based on actual costs of operation of the LUCAS Office as well as supporting a facility development fund for use by LUCAS members. An additional use of the funds is to cover costs incurred by the Office of Finance to process the invoices generated.

When a surplus of LUCAS Administration funds exists, surplus may be made available (on a competitive basis) to LUCAS members who can demonstrate how the funds will increase their laboratory's capacity to provide analytical services to clients. Funds may also be used for emergency repairs upon approval by the LUCAS Director.

MEMBERSHIP BENEFITS

- A data server for sharing and archiving data and providing data exchange for clients.
- Guidance on QA/QC.
- Job Costing/Invoicing Services. This is performed monthly or as received. These are submitted first to the LUCAS Office which then submits a request for an invoice to the Office of Finance.
- Access to shared technical staff.
- Marketing/contact management support.
- Joint marketing referrals and delivery of services under the LUCAS brand (LUCAS is a registered trademark in Canada).
- Access to internet marketing expertise including promotion of services on LUCAS website, email internet marketing management, and social media marketing.

- Assistance in public relations with Lakehead University's Communications Department.
- Cooperation minimizes service and equipment overlaps and provides additional research opportunities.

LABORATORIES and SERVICES

These operations are independent, under the management and control of individual directors/managers.

- ATRC- Aquatic Toxicology Research Centre
- BLEB - Biotechnology Laboratory for Enzymes and Bioproducts
- BURL-Biomass Utilization Research Laboratory
- FoReST-Forest Resources and Soils Testing Laboratory
- LUGDC-Geospatial Data Centre
- LUMARS-Molecular Archaeochemistry and Residue Services
- LUEL- Lakehead University Environmental Laboratory
- LUIL-Lakehead University Instrumentation Laboratory
- LUMCS-Materials Characterization Services
- LUMINX-Mineralogical & Experimental Laboratory
- LUWSTL-Wood Science and Testing Laboratory
- PDNA-Paleo DNA Laboratory

BENEFITS

BENEFITS TO THE REGION

- LUCAS provides a single point invoicing and contact system for external users.
- Access to analytical services and expertise that are unique to the region. Many regional industries now rely on LUCAS services to maintain productivity as well as to develop new products.
- Enhancement of research facilities at Lakehead University.
- Subcontractor services with private laboratories in Thunder Bay help those laboratories remain competitive in the region.
- Training in marketable technologies helps local students to stay in Northwestern Ontario.

ACADEMIC BENEFITS

- Support of scholarships.
- Funds generated stay within the academic unit and can be used for renewal of equipment.
- Analytical fees are eligible for equipment renewal proposals such as CFI
- Liability coverage via WCB and university insurance.

UNIVERSITY BENEFITS

- Accountability is provided via an Annual Report.
- Shared utilization ensures that Lakehead University's research and teaching resources are used efficiently.
- Improvements to academic facilities via this source of funds supplements or replaces limited durable and repair funds.
- Students are provided access to modern, production based research facilities as well as real-world training opportunities.
- Provides a mechanism for regional access to the university's analytical testing facilities.

CRITERIA FOR LUCAS MEMBERSHIP

- The operation offers non-research based services which can be defined as an analytical test.
- Members operate a facility that is accessible to other members of the academic community.
- Members agree to provide financial information for their operations on a quarterly basis to the Director of LUCAS and to generate a yearly report to be included in the LUCAS annual report.
- Members agree to follow financial control and accountability policies established by Lakehead University.
- Members agree to allow LUCAS to include their LUCAS name in LUCAS marketing initiatives.
- Members agree to follow LUCAS and University guidelines for external fee structures to avoid unfair competition with the private sector.
- Members agree to pay user rates for analytical services required from university facilities and to allow these charges to be transferred at the time of invoicing.
- Members agree that all invoices must be processed through LUCAS.
- Members agree to pay an administrative fee at the time of invoice.
- Membership is approved by the Vice President of Research on recommendations from the Director of LUCAS.

LUCAS INVOICES PROCEDURE

Limitations

1. Invoices over \$5,000 to be approved by the Director
2. Accepted activities are testing or analytical services, training fees and fees directly related to interpretation of test data. Invoices that do not meet the requirements for LUCAS services will be referred to the Research Office for review as contract research.
3. Not accepted are graduate stipends

Procedure

1. Use a unique job number for each job accepted. This usually starts with the first two letters of the lab + year + number for a total of 8 characters. For example, the Instrumentation Laboratory number would look like this: IL10-001.
2. At the end of each month, submit jobs to the LUCAS office for processing. The LUCAS office is located in NO1012 (1294 Balmoral). They should be attention to Ms. Karen Maa, LUCAS. Do not submit invoices directly to Accounts.
3. LUCAS will submit a job summary form with the appropriate LUCAS account number and submit to the Office of Finance. They will create an invoice and create the transactions. The LUCAS fee will be extracted at that time.
4. A copy will be sent to the LUCAS member.

It is the responsibility of the member laboratory to get assurances that the invoice will be paid. Options include a) A contract, b) purchase order, c) a signed requisition. In the event that the invoice is not paid, the transaction will be reversed.

Users may contact Florence Bailey, EDI for advice on when a contract is advisable.

HOW TO BECOME A MEMBER

- Write a business proposal and send it to the Director of LUCAS
- Business proposal should include: description of services provided, customer base, location of facility, who is in charge of services (will lab director interact with customers, generate invoices, etc. or will facility hire a lab manager?), projected annual revenue if available.
- Proposal to offer unique services not currently provided by existing LUCAS labs.
- The business proposal will be first reviewed by Director of LUCAS, and then passed to current LUCAS directors for review. If proposal is accepted by current LUCAS members, then it is passed to Vice President Research for final review and approval.