

Definition and role of the CRCHUM scientific core facility advisor

Context and objectives:

A majority of the service core facilities at the CRCHUM, as we know them today, were created following the move in 2013. The CRCHUM currently has 19 core facilities managed daily by a facility manager, assisted by technical specialists for some of them. The core facilities are also under the supervision of a senior manager, scientific performance (GP).

Alongside the GP, most of the core facilities benefit from the support of a Scientific Advisor (CS). CSs are regular CRCHUM researchers who contribute to the scientific aspects of the facilities. CSs are mandated by the CRCHUM Executive Committee and are experts in the research field of the particular facility he/she is assigned to advise.

The main objective of this approach is to clearly define the role of the CS, in order to enable all the core facilities to benefit from optimal and consistent support from their advisors. In addition, this revision aims to provide a clearer distinction between researchers' responsibilities within their laboratory and their role as advisor to the core facility. It will also enable other new researchers and facility users to better understand the role of CSs.

Finally, we would like to take this opportunity to promote and publicize the role of advisors, so that it is recognized and accepted by all stakeholders within the core facilities, research teams and scientific management.

Definitions:

Assistant Scientific Manager, Basic and Translational Research*: This person is responsible for the overall performance of the core facilities, the implementation of new facilities and their closure. This person is a member of the CRCHUM Executive Committee. He/she is responsible for presenting to this committee (for approval) core facility's implementation, modification and closure projects.

Assistant Manager of Operations*: Responsible for the CRCHUM's operational and financial performance. For the core facilities, this person oversees cost projections, fee schedule updates, and staffing and compensation of core facility employees. He or she is a member of the CRCHUM Executive Committee. He/she presents to this committee (for approval) the annual budgets and fee schedules, among others.

Principal Manager, Scientific Performance (GP)*: Person responsible for the overall organization and management of the core facilities. More specifically, the Senior Manager is responsible for managing human resources, coordinating standardized policies and procedures between facilities, preparing, submitting and managing the annual facilities budget, promoting services, and overseeing overall maintenance and replacement of equipment. This person reports to the Assistant Scientific Director and to the Assistant Operations Director.

Coordinator of the Research Development and the Facilities: This person assists the Senior Manager in the administration and scientific development of the core facilities, and assists in the acquisition and integration of new equipment into the core facilities, and in the replacement of existing equipment. This person reports to the GP.

Core Facility Manager (RP): Person responsible for the day-to-day management of a core facility, its equipment use and maintenance, its service provision and customer relations. This person reports to the GP.

Note: The Unit for Innovative Therapies (UIT) is managed by the Assistant Director of Clinical Research and is not concerned by this document. The CITADEL core facility is under the scientific-data assistant management, but remains under the operational management of the GP. Finally, the Animal Core Facility is also managed differently from the other facilities, and there is no CS associated with its development.

Roles of a core facility's scientific advisor:

Main roles and responsibilities:

1. The CS plays an essential role in the development of the services offered, as well as in the scientific and strategic orientation of the facility. Periodic meetings between the CS and the RP are essential to discuss and initiate scientific developments aimed at improving the services offered by the core facility. These discussions must take into account the facility's capacity and resources to develop a new service, the competition and the impact of new developments on current and future customers. The CS must make sure to propose developments that will benefit all internal and external research teams. In other words, the CS must not propose activities that will benefit only its own research team or one of its external collaborators.

For this role in particular, the CS contributes to the drafting and/or review of funding applications, including:

- i. CRCHUM R&D program
- ii. Competitions from the MEIE, as well as other public and private institutions.
- iii. Drafting and justifying the choice of instruments required when applying for funding from the Canada Innovation Fund (CFI), or for equipment from funding agencies such as NSERC.

When a new development is undertaken by the platform, the CS must also help resolve technical problems encountered during development by proposing solutions.

2. The advisor is not involved in the administrative management and day-to-day operations of the core facility (service provision). The operational activities of a facility are mainly the responsibility of the RP, who reports to the GP. The manager may seek the assistance of the CS for recommendations, but operational decisions remain the responsibility of the RP and the GP.

- a. More specifically, the CS is not directly involved in the staffing and financial management of the facility, including setting rates, salaries, contracts or budgets. The CS can only make recommendations on rates, salaries, etc., but these are not binding.
 - b. The CS must be able to examine the annual budget before it is submitted to management. The purpose of this consultation is to assess the financial health of the facility and to verify that the strategic developments discussed with the RP for the coming years are correctly included in the budget.
 - c. The CS can also consult the performance indicators of the facility to acquire an informed view of the services that are the most in demand by clients, as well as those that are declining and may need to be replaced. This access helps guide proposals for any new development of the service offering.
3. The CS must also actively contribute to the development of its facility's clientele, and be involved in attracting new clients.
- a. For example, the CS can provide/establish a list of contacts and potential customers from his network of researchers and colleagues, and recommend to them the services of CRCHUM platforms in general and his own in particular.
 - b. The CS must commit to mentioning the facilities and including the CRCHUM facilities logo in general and in particular in presentations (PPT).
 - c. The CS must thank the facilities when he/she uses them, thus setting an example and encouraging other researchers to do the same.
4. The equipment that supports the current service offering of the facility requires periodic renewal. The CS contributes to the replacement of major equipment, in particular:
- a. By submitting a funding application to the CHUM foundation with the help of the RP and GP.
 - b. By participating in FCI applications, reviewing the choice of instruments and their justifications when submitting these applications, as well as when reviewing the list of equipment to be replaced every three years.
 - c. By exploring purchasing opportunities, e.g. through auctions or inter-institutional transfers.

Secondary roles and duties:

1. The CS may be asked to review the presentations (ppt) that the facility manager will give when he/she organizes events, such as a Lunch&Learn or the Midis-plateformes.
2. The CS must provide support by signing letters of recommendation and providing letters of support for the RP and, where applicable, the specialists, when they submit training applications. More specifically, the advisor must review and correct the documents provided by the manager, which are required to submit his/her application.

3. The CS must support (sponsor) the person responsible for access to publications at the Université de Montréal (UdM).
4. The CS can invite the manager to participate in themes meetings. For example, he/she can help the manager contact the theme with the most users, or invite him/her to present updates on the facility at theme meetings.
5. The CS must get involved in the core facilities' community by:
 1. Attending the annual review meeting of the facilities.
 2. Attending activities organized by the facilities in general, or at least those organized by his or her facility (e.g., open house, facility lunch, seminar, etc.).

Duration of mandate and co-advisor:

Duration of mandate: A mandate of four years (renewable) could be established for certain facilities if applicable. The term should be reviewed with the GP. The mandate could be terminated earlier if discussed and authorized by CRCHUM management.

Co-Advisor: In some cases, a facility may have two CSs in order to adequately support the facility's developments. In fact, some facilities have extensive scientific activities that may require the contribution of two CSs in different fields (e.g. biology and engineering)

Summary:

The CS has a very important role to play for the facility and its sustainability. Not only must the CS be involved in the strategic development of the service offering, but also in the facility's outreach (e.g., customer expansion) and the acquisition or replacement of the facility's equipment. The CS must also help the manager with a number of other secondary tasks, and participate in the community life of the platforms, including Round Table days.