Personnel recruitment/retention

Your core facility is in need of additional staff to support increased workload and to alleviate scheduling backlogs. The most efficient recruitment would be for someone with experience so that they could be functional in a shorter period of time than someone with no experience (entry level). In addition, in the past when you have brought in an entry level person and trained them, because the salary of the entry level position, they left as soon as they had enough marketable skills to get more money elsewhere. You have identified several candidates with experience but they are requesting salary levels higher than your current experienced staff that has been with you for 10 years. How do you handle this situation in order to adequately staff your facility as well as retain your valued employees already there?
**Personnel recruitment/retention**

You have posted a new position and have several candidates who appear very well qualified on all aspects of flow cytometry. What approaches can you take to validating their true experience before they come in for interview? What approaches can you take for final face-to-face interview?
Education and training

Your core facility has a large variety of different instruments and software. You offer a generalized group training class that deals with the basics of flow cytometry with hands on one of the more basic instruments, including instrument maintenance/operation. You do individual training on the other instruments as requested by users. You often find that users are not using/maintaining the instruments properly after they have been trained and when confronted claim they were never taught these things. What mechanisms can you put in place in your education/training program to insure users fully understand the appropriate use and maintenance of the instrumentation?

1) Operators only, or operators overseeing
2) Official training - no users training other users
3) Posting instructions- especially start up/shut down but these get ignored
4) Checklist for training- sign off of check list
5) Electric shock punishment for infractions
Education and training

Your facility requires that all users of your equipment complete your training program. You have a new user who claims to have 10 years experience running the same instrument at another institution and feels they do not need to take your training. To make matters worse this individual is working on a short-term project that will end before your next training session. How do you handle this situation without opening a door that other users will take advantage of in the future?

- Mostly try to accommodate user/easier in a staffed lab
- Assess their competence - fairly simple, if not try to fit into training schedule
- Level of training depends on need/experience/instrument
- Instrument Log on
- User/steering committee
Education and training

You want to implement a series of lectures for all users of the facility. You intend for these lectures to be delivered by you and your staff, however, some of your staff are still learning themselves. How do you plan so that users get the information they need while you are also fulfilling your role as an educator of core cytometrists?
Education and training

You have a limited education and training budget for your staff. One senior tech has asked for funds to attend ISAC and also present some data. At the same time, three more junior staff members have asked to attend a teaching day hosted by another institution. The costs are similar but you can’t afford all. How do you evaluate and decide?

- Send senior tech to ISAC but upon return would have to present to the team on products/technology/ research issues
- Look at the content of the one day course to see if it could be done in house by the lab manager or a visiting company (webinars, lab visit to another institution)
- Look at scholarships for alternative sources of money to send one or more of the Jr. Staff to the one day course
- May get turn another year or time
Education and training

Your lab has just acquired funding for two new entry-level technicians. You ultimately choose the two best candidates but both have only cursory flow experience and neither have operated a sorter. You only have one free slot for company training and funds are too tight to send them both. What is your approach to training these new future operators?
Education and training

You have a formal training course that is offered four times a year. There is a fee to take this course (so it generates revenue) and it is open to anyone within your Institution. Users of your instrumentation are required to take this course before they can independently use the instruments. As a result there is a high demand for a spot in this course. Another Center in the same institution that has its own instruments is sending all of its users to this course reducing the availability of slots for your own users. How do you handle this?

-Consider first come first served sign up -Also considered a higher fee for the outside labs, settled on putting users of lab ahead of users from other labs, especially because users of your lab need training to use core instruments
Scheduling/billing

Cell sorting is a very big demand at your facility. You have two sorters and two cell sorter operators. The cell-sorting schedule has a 6-week backlog. Some of your users have very specialized scheduling needs (i.e. they can’t necessarily predict that far in advance when their animals/samples will be ready or they are trying to quickly respond to a grant or manuscript reviewer’s request for additional data). There is no funding for additional equipment or staff this budget year. How can you accommodate your entire users cell sorting needs without negatively impacting on scientific outcomes?
Scheduling/billing

You need to introduce a streamlined approach to billing. There are several commercial solutions available that would be ready out of the box but may not exactly suit your set up. Or you could develop something yourself specifically for your needs. How do you assess the best use of your time and funds?
Instrument selection/purchase

Mid budget year you have gotten funding to purchase a new cell sorter. This funding must be used within 6 months. You have scheduled demos with several manufacturers who make products that suit most of your needs, but none of them offer something that suits all your needs. During all the demos none of the instruments perform perfectly. Given the above constraints how do you go about making a purchasing decision? Describe the factors you will consider in making your decision and weight their importance.
Instrument selection/purchase

You are in the market for a new analytical cytometer. You have spent a great deal of time evaluating all the options and made recommendation to your Purchasing Officer as to the instrument you want. The Purchasing Officer insists on putting it out to bid and the “lowest bidder” you feel does not provide a product suited to your needs. How do you get what you want?

1) Tool has to meet criteria/specification needed, speak to other institutions with similar equipment to verify
2) Operational costs
   A. Reagents
   B. Service
   C. Training
   D. Technical support

3) Ease of use
   A. Legacy instrument
      - use filters
      - similar software
      - upgradability
Instrument selection/purchase

You have just received funding to replace an older piece of equipment. You have a very diverse group of investigators that you serve. You know it will probably be a long time before more money comes along in the future so you want to make sure you buy something that can satisfy your current as well as your future needs. There seem to be so many choices and options but you have a limited budget to work with. Discuss your approach in deciding which instrument to buy to get you the best bang for your buck.

- Get all users on board and explain what your decision process will be, input it to keep them astride (?)
- Ensure flexibility and not just buy for their current needs but what the whole user buy will need in the future
- Despite limited budget, need to make sure it will work !!!!
- Consider service contract prices

- Software may need to be (undecipherable) and not to (wing?) check it. Not user friendly, but if it gets results then better science, upgradable = more (?), hit max benefits- cutting edge, experts may be needed to get max potential
Instrument selection/purchase

You have been given the opportunity to submit a grant to obtain funding for a new piece of equipment. You have a clear idea of what types of instruments would best serve your core clientele but your supervisor/director has a specific need for his/her own research and they want to submit the grant to obtain an instrument that specifically serves his/her needs. How do you go about getting what you believe is in the best interest of the masses vs. the individual given the chain of command?

1) Survey user group to identify list of needs and wants and compare to the Director's needs then find an instrument that satisfies both groups if not........
2) Have a rational conversation with the supervisor and data to attempt to reach an agreement
3) Write a two grants or split out the Supervisor's wishes to another grant and let the study section decide which grant merits the funding based on science
You run both manufacturer’s QC/QA protocols and your own protocols on your instruments daily. Your criteria for acceptable QC/QA are more stringent than the manufacturer’s. Your daily QA fails your acceptable ranges but is within the manufacturer’s specifications. You contact the manufacturer to report the failure and they say as long as it is passing their specs there is nothing wrong with the instrument. Can you let users continue to use the instrument under these conditions? How do you determine which level of specification is more appropriate for your laboratory and when does a QA failure warrant taking the instrument offline?
QC/QA

A group of researchers utilizing your sorting facility has been complaining about low recoveries based on their calculated starting materials as well as loss of functionality of those subsets. No other labs have reported any such problems. What can you do to determine if the problem is an instrument problem vs. an individual group’s sample problem?
QC/QA

It was requested that your facility give access to the analytical cytometers to researchers at all hours. Since your lab is typically staffed from 8-5, you will be unable to assist these users if they have issues with the instrumentation. What steps can you take to insure after-hours users obtain good quality data?

1) *Make sure users are certified, annual recertification*
2) *Limit people changing configurations*
3) *Suggest they run their own QC and review the following day*
4) *Post SOP's/trouble shooting docs*
One particular lab has complained about periodic yeast contamination in their post sort material and they are insisting on time-consuming overnight instrument decontamination protocols prior to their sorts. Other sorts done on the same days for other investigators have not had any such contamination. How do go about determining the source of contamination?

1) Do the cleaning
2) Check before and after they culture it
3) Do a mock (?) 3/samples into sheath , 3/samples not ; convince the user it is not the instrument

1) Convince user it's his fault since his samples are the only ones contaminated
2) Do a mock/blind sort into 6 tubes with their media in it, collect sheath in three and don't put sheath into the other three, don't tell the user which were sorted into which tube and which were not. If all six are contaminated then it is the users problem.
**Funding/budget**

You have been told that all core facility budgets will be cut by 10%. Since you are responsible for putting the final budget together and must make decisions on what areas to cut to meet this 10% reduction describe the approach you would take to meet these target reductions while still maintaining adequate resources for your facility. Identify what your priorities would be in terms of funding and how you could streamline your operations and still provide the necessary services with less funding.

1) *Service contracts vs Third Party vs Self Service*
2) *Small consumables- fewer freebies, explore vendors and discounts*
3) *Eliminate costly services, charge more or incentivise user efforts*
Funding/budget

Service contracts are the second largest expense in your budget (after personnel). As a cost cutting measure you are asked to eliminate or significantly reduce this expense category. Describe what some of your options might be to accomplish this without compromising the availability and workflow of your instrumentation.

-Drop contracts on analyzers
-Go with 3 rd party service provider eg Cytek
-Go with Remi for bulk cheaper service -Keep contracts on sorters
A particular group of users from an individual lab have continually abused scheduling policies (scheduling time and not showing up, or asking for after hours usage and not showing up after you left the instrument on for them, or running over their scheduled time slot backing up other appointments) and abused instrumentation (continually clogging the instrument and leaving it that way without telling anyone, leaving the instrument running and leaving the lab). You have spoken directly to each of these people as well as to their PI with little improvement. In fact, the PI makes excuses for them and says he doesn’t care if you charge him for the extra time they don’t show up, however, this still impacts on other users of your facility. You would like to ban this lab from your facility but the PI is a very heavy user and accounts for 30% of all your revenue. In addition the PI has political clout within the institution. How do you deal with this situation?
Customer service

Your sorters are all booked solid for up to 4 weeks out and the demand for appointments is very high. You have a policy, which is well advertised on your website and scheduling calendar, that if someone cancels an appointment with less than 48 hours notice (or just doesn’t show up) and you can’t fill the slot with someone else then the PI is charged for the full time of the appointment. To make sure individuals have not forgotten appointments made weeks ago you send out a reminder to everyone the week before their appointment. You get a complaint from one of your PIs regarding a bill they received for sorting time they booked but did not show up. You remind the PI of the advertised policy but he/she says they were unaware of the appointment. You check to make sure a reminder was sent out and you notice the reminder went to the student that made the appointment but the PI was not copied, as is normally the procedure. How do you handle this?

1) Policy is clear, procedure wasn't followed- Bill Anyway

2) Policy is clear, procedure was not followed- don't bill

3) Warning issued
Marketing a Core

You send out an annual survey to all researchers in your institution to evaluate how your core is doing as required by your administration. When you get the results back you notice that 80% of the respondents say they are not using your core because either they didn’t need the services or were unaware of the services. Describe what steps you may take to insure the research community is a) aware of your services and b) aware of how your technology may benefit their research.

1) Should never have got to this stage!
   You need to find out what product or service the users need - market research, structured survey

2) Creating and facilitating the need
   Understand the users and research needs
   Don’t charge users undertaking the set up
   Supply education and training

3) Technology updates and seminars
   Participate in interest group meetings

4) Making support tools available
   Software or whatever that may be

5) External- has to be short term and within remit
   Website and social networking
Marketing a Core

You have gotten a new state of the art piece of equipment that utilizes different technology/software than most of your other instrumentation. Before you purchased the instrument you surveyed your users and many of them said they would use such a technology if available. After implementing the new instrument you notice no one is using it. How do you generate interest and get this new service off the ground?
Marketing a Core

You have recently lost the business from several major users who have left your institution. This has had a major impact on your bottom line. Describe what types of activities you might undertake to generate additional business from existing users as well as generate new business from researchers currently not using your facility to offset this loss.