MIND

Peer Mentoring Teams for Career Exploration

Design Considerations and Facilitator Training Manual

Motivating INformed Decisions (MIND)
Preparing UCSF for a Changing Biomedical Workforce

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Instructions for Attribution

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Acknowledgements

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*Starred sections are optional for facilitators who are alumni of the MIND program.

Forward

Whether you are a faculty or staff member, Ph.D. student, or postdoc, if you are considering starting a **peer mentoring team**, this manual is for you.

- In the "Introduction for Program Developers," we share some factors worth considering as you design your peer mentoring team(s). We also summarize our experience recruiting facilitators and detail the staff time needed to sustain our system of peer teams.

- In the subsequent chapters, we reproduce the training curriculum that we developed over the past four years as we **trained 60 individuals to facilitate 41 peer mentoring teams**. This curriculum continues to evolve every year based on feedback from both facilitators and peer team participants alike.

These materials are set in the context of career exploration, since that is goal of our program. If you would like to use peer mentoring teams for a different purpose (like writing papers, dissertations, or grants) we are happy to provide a .docx version of this document for you to adapt. Just email us at mind@ucsf.edu.

Best,

Jennie B. Dorman, Ph.D.
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Introduction for Program Developers Considering Using Peer Teams

Genesis of this manual

This manual was developed with funding from NIH BEST Award # 5DP7OD018420 as part of the "Motivating Informed Decisions (MIND): Careers for the Future Biomedical Workforce" program at University of California, San Francisco (UCSF).

The MIND program was created to address the logistical and motivational challenges that doctoral and postdoctoral trainees often face when they undertake a careful examination of their career options. It was designed by a diverse coalition of stakeholders including staff of UCSF's Office of Career and Professional Development, as well as faculty and high level leadership from the School of Medicine, Graduate Division, Student Academic Affairs, and Chancellor's Office.

The MIND program employs several key design principles:

- **Career neutral.** Many UCSF students and postdocs are simultaneously considering careers in academia as well as careers outside academia (Fuhrmann, 2011). In the MIND program we support **all career outcomes** and encourage our participants to explore them all with equal rigor.

- **Low impact on research.** Our campus has a well-established internship program for graduate students, but not everyone can devote the time necessary to complete an internship. In the MIND program we emphasize exploration strategies that take less time (e.g., reading, conducting informational interviews, job shadows and simulations) and can be used to efficiently consider and rule out possible careers. We also schedule most course meetings on Saturdays, when our trainees feel more at liberty to take time for their own professional development.

- **Encourage conversations with advisors**. We do not require graduate students and postdocs who wish to participate in our program to obtain permission from their PIs, but we actively encourage them to discuss their career interests with their PIs.

- **Cohort model to build community and connections.** Trainees apply to our program, are selected, and then move through the 8-month program together, as a cohort of 70-90 people.

The MIND program consists of two phases:

1. **Phase 1. Catalytic Course.** To expose participants to basic career exploration theories and to help them practice career exploration and networking skills, we offer a 21-hour, interactive "Catalytic Course" [link to syllabus on website]. Participants take this course as a full cohort, and we build in many opportunities for them to interact and practice the skills being taught.

2. **Phase 2. Career Exploration in Peer Teams.** We also wanted to ensure that trainees remained engaged through the inevitable ups and downs of career exploration. To reach this second goal, we decided to split the cohort into smaller teams that would meet every two weeks for six months using a facilitated peer mentoring approach.

This manual represents the facilitator training curriculum we developed over the past four years as we trained 60 different people to serve as peer team facilitators for 41 peer teams. It has evolved in response to feedback received from both facilitators and participants alike, and the peer team experience has in turn informed the catalytic course.

Why peer teams for career exploration?

Since 2001, when UCSF's Office of Career and Professional Development (OCPD) was established to serve graduate students and postdocs, OCPD's career counselors had noticed a troubling pattern: many trainees appeared at the career center for the first time – in a panic—just months before they needed their next position. Those trainees who did begin exploring careers earlier often found it hard to sustain career exploration activities amidst the pressures of research and the rest of life. As a result, many of our trainees were reaching the job market before they had a clear plan for what they wanted to do, and before they had a professional network that could help them get there.

We needed a new method that would introduce students and postdocs to career exploration much earlier in their training and would support them through its inevitable ups and downs.

For both pragmatic and philosophical reasons we wanted to try using peer mentoring teams to help trainees stay engaged in career exploration. Pragmatically, we were

concerned that the demand for our 1-on-1 career-counseling services might one day outpace the available supply. Philosophically, we believed that career options should be openly and rigorously examined, and we wanted to reduce the isolation that often shrouds this subject. We also believe that a great deal of professional development can be attained simply by being a member of a close-knit group and witnessing, at close range, the experiences of others.

Peer mentoring groups are used extensively in the business world (where they are often called peer mentoring circles), and have been applied in academia and government to help participants reach many different kinds of challenging goals, including:

- Writing papers/grants/dissertations:
    - http://pda.bwh.harvard.edu/career-development/grant-writing-circles-pilot/; https://www.seattleu.edu/faculty-development/events/writing-groups/
- Job search:
    - American Chemical Society's job clubs https://www.acs.org/content/acs/en/careers/career-services/jobclub.html
- Learning supervisory skills:
  https://www2.usgs.gov/humancapital/ecd/ecd_supervisorycoaching.html
- Career and professional progress in general:
    - *Every Other Thursday* by Ellen Daniell
    - In Person: Career GPS:
      http://www.sciencemag.org/careers/2012/03/person-career-gps
    - Massachusetts chapter of the Association for Women in Science https://www.nature.com/articles/nbt.1799

We designed the MIND program to test whether peer mentoring groups could provide the support and structure needed to engage our trainees in a more sustained way in **career exploration**.

Who participates in our peer mentoring teams?

In order to be eligible for our program, graduate students must have passed their qualifying exams in the prior year (although we have occasionally admitted students who were closer to graduation). We initially admitted only first or second year postdocs, but based on demand we soon expanded eligibility to postdocs in their first five years at UCSF.

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Principles of peer team composition

When organizing a peer team, you must decide whether or not to group participants by some shared attribute (such as stage in career, career interests, gender, or field of study, etc). In this section we lay out the thinking behind how we constituted our peer teams, but you may choose to compose your teams in a different way that works better for your context.

There are merits to both heterogeneous and homogeneous groups. When participants share an important aspect of their identities, it can help them to build trust and candidly discuss their challenges. In the "In Person: Career GPS" group, for example, participants were united by being "fellow scientist-moms with career ambitions such as our own" (Shkolnik, et al., 2012). However Shkolnik also noted that the members of her group were sometimes in direct competition for the same professional opportunities, since several of them sought faculty careers in the same field. Thus the homogeneity of their team's career goals proved challenging.

Heterogeneous groups can offer a broader array of perspectives, and – perhaps more importantly – can illuminate underlying similarities between people who may at first appear quite different. Heterogeneous groups are harder to "sell" to participants initially, but many participants ultimately see the heterogeneity as a key benefit.

When designing our peer teams, we faced two main such decisions: whether or not to group participants by the careers they were interested in exploring, and whether or not to mix graduate students and postdocs.

Should we assemble teams based on career interest?

Despite the fact that our program's main focus is career exploration, we decided NOT to group our participants by career interest for several reasons:
1. We knew that our trainees are often strongly considering two or more very different career paths, making it hard to assign them to a single career-based team.
2. We knew that interests career interests can change rapidly during periods of concerted career exploration, thereby rendering a team focused on an original career interest seem less relevant.
3. We wanted to avoid competition between team members with similar career interests.

4. We also faced a simple but profound logistical challenge. Our trainees were spread over multiple campuses, with different scheduling constraints, so simply convening teams at a time/place that all could attend was already a complex puzzle without factoring in career interests.

Although many participants initially wondered why we did not assign them to peer teams with others of similar career interests, on end-of-program surveys they noted several benefits to this heterogeneity:

1. Gave them **exposure to careers** they hadn't known about.
2. Taught them **career-exploration strategies** that could be applied to the careers they were interested in
3. Allowed them to tap a **diverse network of professional contacts** that their teammates had.

Should we combine or separate graduate students and postdocs?

We also strove for a mix of postdocs and (3rd and 4th year) graduate students within each team, and observed that although these two groups typically progress through career exploration at different rates —the postdocs being more motivated to sort out their career plans quickly—they nevertheless learn a lot from each other. While postdocs have more experience, and are likely closer to the job search, graduate students are often more integrated into the institution and more aware of local opportunities; both populations benefit from the other's knowledge.

Also, a sizeable fraction of our postdoc population is composed of international scholars, and thus many of our peer teams consisted of a mix of internationals and U.S. citizens/permanent residents. This was a deliberate choice intended to improve everyone's interpersonal communication skills, as many jobs will involve working in teams with members from diverse backgrounds. International postdocs told us that it was extremely useful when at least one of their peer team facilitators also had experience navigating visas/ green cards, etc., although we were not able to achieve this in every case.

We also strive for a mix of women and men on every team, and we make sure that each team contains at least one or two extroverts (they take the MBTI personality assessment before we assemble the teams, and we usually have a majority of introverts). Finally, we separated members of the same lab, to ensure that everyone felt free to speak candidly and confidentially within their peer teams.

How often should peer mentoring teams meet?

The first year we offered the program, the teams met monthly. Participants reported that their motivation to do the work of career exploration spiked for the several days immediately before and after each meeting. In an effort to stimulate more frequent bursts of activity, we decided that subsequent teams would meet every two weeks. This was an improvement overall, although in some cases two weeks proved too short an interval for reaching their goals. Meeting every three weeks might be the ideal interval between meetings, but would greatly complicate scheduling peer team meetings, which was already a significant challenge.

Why facilitated peer teams?

Many peer mentoring teams arise organically and do not employ facilitators (Shkolnik 2012). In our context, where we convene and support 10+ peer teams per year composed of people who might be perfect strangers, we felt that facilitators were important for, maintaining meeting tone and structure, watching the time, mediating between personalities and ensuring that everyone receives focused attention from the group.

The first year we started small, convening six peer teams, all of which were facilitated by MIND PIs and staff. We learned as we went. The second year, our program grew and we needed 10 peer teams, and that meant we needed to recruit – and train-- more facilitators.

How to recruit facilitators?

Identifying potential facilitators

A detailed description of the roles and responsibilities of MIND peer team facilitators can be found on p. 26.

The majority of our facilitators have Ph.D.s, and many have undertaken career exploration themselves. However, in our model, being an effective facilitator does NOT require content expertise about different career paths, since the peer team members are each responsible for self-directed research about the careers of interest to them.

Thus when scouting for facilitators, we prioritize people with good teaching/ facilitating/ interpersonal skills, rather than people with specific career expertise. We rely heavily on

personal recommendations from colleagues in the Graduate Division, Office of Career and Professional Development, and the Office of Postdoctoral Scholars. We reach out either in person or via email (see sample recruitment email in the next section). If we do not know the facilitator candidates personally, we meet them one-on-one to gauge whether they have the interpersonal skills we seek, and to explain the responsibilities.

As mentioned above, during the first year of our program, all the peer teams were facilitated by our **PIs and program staff**. The second year we also recruited **alumni of MIND peer teams** to serve as facilitators, as well as **other trainees** who had distinguished themselves as effective teachers or leaders. Starting in the third year, we also recruited **professional staff from our institution** (from the offices of technology management, strategic alliances, research development, and core facilities, for example) thereby illuminating more possible careers for Ph.D.-trained scientists in the university. By the fourth year of the program, some of our alumni had left UCSF for new positions, but still came back to volunteer as facilitators, underscoring the fact that facilitators need not have a current institutional affiliation.

Faculty: Faculty member Keith Yamamoto (a MIND Co-PI) played a substantial role in the design of our peer team process and facilitated several peer teams. Keith was one of the founding members of the group described in *Every Other Thursday,* and his personal passion for this peer mentoring approach was a great asset. In general, however, we did not ask other faculty to serve as facilitators. Trainee feedback indicated that the presence of a faculty member might make participants less candid about the true range of their career interests.

Initial recruitment email

Hi [Potential Facilitator],

[Name of recommender] recommended you as peer team facilitator for the MIND program.

Peer team facilitators are a critical component of the MIND program, which helps students and postdocs explore careers. Peer teams consist of 5-7 students and postdocs who meet twice a month to set career exploration goals and report on progress.

Each peer team will have two facilitators. These peer team facilitators need not be career experts. Rather, they serve to steer discussion in a productive direction. If you're someone who enjoys teaching or mentoring then this may be a great fit for you.

The commitment as a peer team facilitator will involve:
- Training (two 2-hour sessions)
- Attendance at the Peer Team Launch event, where you will meet your team (Saturday, 1/20/18)
- Twice monthly meetings with your peer team and co-facilitator (roughly 2 hours/meeting) from mid-January to mid-June.

Please let us know if you are interested in learning more. We would love to have you as a peer team facilitator, and hope that you will join us in making MIND a success.

Best regards, [Peer team program manager]

How many facilitators per team?

All of our peer teams have had two facilitators. Having a single facilitator per team is tempting for expedience, but we found that having two facilitators per team worked well for several reasons:

- When one facilitator was called away by travel or illness, the other facilitator could maintain continuity.

- It was easier to recruit facilitators who were concerned about their lack of career expertise if they knew they would have a partner.

- It also enabled us to recruit prominent people who would not have been able to devote time to team logistics. These more senior facilitators were paired with a more junior facilitator who served as the logistical "glue" for the team.

- Every facilitator had a built-in colleague with whom they could discuss team progress and trouble-shoot team dynamics, etc.

For all of these reasons, even as our program grew, we have maintained two facilitators per team.

Are incentives necessary for recruiting facilitators?

Below, we share a few thoughts about whether incentives are necessary for recruiting facilitators.

- *To pay or not to pay?* For the first two years of our program, we did not pay our peer team facilitators. In year three of our program we decided to pay facilitators a modest stipend, but this proved to be an administrative nightmare so we discontinued the practice the following year. We were concerned that interest in facilitating might decrease when people learned they would not be paid, but, happily, that concern was not borne out: we still had enough facilitator volunteers in year 4. Based on our experience we would NOT recommend that you pay facilitators a stipend, although providing a small gift card to thank facilitators at the end of the experience is entirely appropriate.

- *Intrinsic motivations.* When asked "What was (were) your main motivation(s) in deciding to volunteer your limited time as a MIND peer team facilitator?" our facilitators frequently cited the desire "to give back" and "to help others." Others noted that they took on this role "to get more teaching/advising/leadership experience," "to get motivated for [my own] career exploration again" or to "explore the career counselor track" as a possible career. Oftentimes a facilitator stated multiple motivations, as in this example: "I wanted to give back to the MIND program (which was an enormous help for me). I thought the experience would be good for me and add to my skills and resume."

- *On call career support.* Another way that we have tried to thank our facilitators is by supporting their personal career development efforts, as many of them are actively engaged in career exploration and job-seeking activities of their own. We provide counsel, connections, and application material review, on demand whenever a facilitator reaches out for help.

Does serving as facilitator negatively impact other responsibilities?

To understand the impact of serving as a facilitator on their other responsibilities, at the end of the program we ask facilitators to complete the sentence "Serving as a peer team facilitator had [a positive / negative / no effect] on my own **research** this past year." We ask them to explain their selection. Thus far we have received responses to this question from 38 facilitators.

Positive effect on research	13% (n=5)
No effect	76% (29)
Negative effect	11% (4)

All four individuals who indicated **a negative effect** referred to the time commitment to attend peer team meetings (3-4 hours /month).

The most common selection was **"no effect,"** and representative quotes are shown below:

- "Negligible effect - we were able to have early morning meetings which meant that I could basically have a completely normal research day."
- "Definitely took a bit of time away from being in lab, but it also made me more invigorated about achieving my own career goals, which I believe helps my research and overall productivity."

Positive effects included:

- "Serving as a facilitator provided me motivation and something to look forward to every two weeks. This definitely had a positive influence in itself on my research. "
- "My research actually picked up pace this year since I started two new projects and I had to learn how to juggle my time more effectively in order to be more productive all around."

What benefits do facilitators report?

We survey facilitators at the end of each program year, and we ask them to complete the sentence "Serving as a peer team facilitator had [a positive / negative / no effect] on my own **career exploration** this past year." We also ask them to explain their selection. Thus far we have received responses to this question from 39 facilitators.

Positive effect on career exploration	64% (n=25)
No effect	31% (12)
Negative effect	5% (2)

Of the two facilitators who indicated that serving as a facilitator had a negative effect on their own career exploration, one provided no explanation, and the other said:

- "The time was significant, though not a burden. My own career exploration wasn't necessarily a priority, so it was demoted."

The "no effect" selection was often explained by a variant of

- "I was doing my own career exploration in parallel, and further along in career exploration and/or in different career paths than the people on my team."

The major positive effects reported were either informational:

- "I learnt from the exploration of my peer team, and had some new ideas for avenues and job titles I could be interested in."

or motivational:

- "It was motivating and a kickstart to get me back on the career exploration process after a lag from when I participated in MIND. I rejoined a biweekly meet up group with other [MIND] alumni to help make goals and contracts and get me moving and motivated") .

When asked "What was the most satisfying part of serving as a facilitator?", the most common response focused on witnessing the progress made by members of their peer team, and feeling like they had contributed to it, as in this example:

- "I really enjoyed seeing the progress of several members of my group. I also enjoyed the process of "facilitating" - helping the group work together and provide input to each other."

Several facilitators reported that the experience had enhanced their skillset in a way that would serve them well in their future careers, as in the following two examples:

- "I found it quite challenging but at the same time very rewarding. I learned a lot about effective leadership, communication and facilitating discussions and it would definitely be a story I could tell in any future behavioral interview questions."

- "I genuinely enjoy serving as a sounding board for different ideas, be it scientific or non-scientific and this also facilitates my learning of a wide variety of topics. Additionally, my current career track is set towards an academic PI and I wish to be a well-rounded mentor for anyone I will train. Serving as a facilitator has definitely taken me a step closer towards this goal."

The third theme focused on using one's own experience to benefit others:

- "The most satisfying part is to provide comfort to those struggling as I was over a year ago."

- "Mentoring is awesome; it's nice to be able to bring the experience of my crooked career path to bear on something/someone valuable; supporting the pipeline of scientists who also realize that research training is a means to many ends."

In summary, our experience shows that peers and university staff can and will step up to help trainees navigate the challenges of career exploration, and will do so on a volunteer basis. Thus the facilitated peer team model appears to be sustainable and scalable.

What if someone leaves the peer team?

No matter how thoughtfully you compose peer teams, some participants will need to drop out. Initially our teams each consist of 5-7 participants and two facilitators, but we have consistently seen attrition over the six months our peer teams meet:

- Typically, of 90 trainees who begin our Catalytic Course in October, around 70 finish the program in June. Participants have had to withdraw from peer teams for a range of reasons including serious illness (either their own or that of a family member), their research intensifying, their advisor suddenly leaving the institution, another crisis in the lab, getting a job, etc.

- Of the 40 facilitators we've worked with over the past four years, two have had to leave the program mid-year, in both cases because they left UCSF for new positions.

In our experience team morale suffers if a participant disappears without communicating with their team. But if handled properly, departures need not negatively impact the team; in fact, when a team member leaves to take a job, it can actually be quite inspiring. To ensure minimal negative impact to teams, we have developed a protocol for participants to follow if they need to leave their team (see page 93).

We have also found that four participants is the minimum number for a productive and lively peer team meeting. Because of this minimum, we recommend merging (with their permission) any two teams whose membership has dwindled to <4 people each.

Staff time required for peer teams?

As described above, peer teams require support to be effective. Most of this support comes in the form of staff time, with small amounts required for food and supplies. One of our PIs (JD) spent approximately 15% FTE developing and leading our approach to peer teams, including writing this manual and serving as lead trainer for facilitators. To maintain our system of 10+ peer teams per year, our program director and program manager spent, respectively, approximately 15% and 5% of their time supporting peer teams. This staff time is required to carry out the following tasks:

Before peer teams start meeting:

1. Recruiting facilitators
2. Polling participants and facilitators about their schedules and preferred location for meetings, etc.
3. Composing peer teams, and checking with facilitators and participants to make sure there are no conflicts of interest with their team members, co-facilitators, etc.
4. Training facilitators (also budget for snacks and training materials)
5. Organizing and leading our "Peer Team Launch" event, described in full on p.70. (Eating together is an important part of building trust between team members, so we budget to serve pizza at this event.)

After peer teams start meeting:

Even the best-intentioned teams sometimes encounter challenges, so our program staff take a lot of measures to ensure that teams remain productive, including:

6. Responding to any questions or concerns raised by participants or facilitators
7. Convening facilitators for lunch after 1-2 team meetings to troubleshoot team dynamics and share strategies for effective facilitation.
8. Surveying participants after a few peer team meetings to ask how the team is functioning.
9. Providing each facilitator with anonymized feedback from their team members.
10. Conducting observations of one peer team meeting mid-way through the peer team phase.
11. Communicating with participants who need to leave the program, and serving as a liaison between them and their peer teams, when necessary.

In sum

We hope this introduction has provided a foundation for understanding how peer teams have worked for us, and whether a similar system might work for you. If you have further questions, please email mind@ucsf.edu.

The rest of this document features a lightly edited version of the training manual we gave our facilitators in academic year 2017-2018. Henceforward, "you" refers to the facilitator. Since some of our facilitators are NOT alumni of the MIND program, we do not presume any familiarity with the program or with peer teams.

MIND

2017-2018
Peer Team Facilitator Training

Motivating INformed Decisions (MIND)
Preparing UCSF for a Changing Biomedical Workforce

Jennie Dorman, Gabriela Monsalve, Elizabeth Silva, Theresa O'Brien, Keith Yamamoto, and Bill Lindstaedt

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Introduction for Peer Team Facilitators

Welcome aboard as a MIND peer team facilitator! We are indebted to you for volunteering to serve in this important role, and will do everything we can to support you. Please feel free to reach out anytime with any question or concern, large or small.

> [Program Director Name and Email]
> [Lead trainer Name and Email, if different]

Structure of Training Process

We know how busy you are, so we have limited the in-person trainings to two 2-hour meetings (#2 and 4 below). Thus our training strategy relies on you reading the enclosed materials before (#1) and between (#3) these meetings.

1.	2.	3.	4.	5.	6.	7.
Pre-reading for Day 1	Training Day 1	Pre-reading for Day 2	Training Day 2	Planning meeting with your co-facilitator	Meet your team at the Peer Team Launch	1st independent peer team meeting

The events depicted in orange above are scheduled by us, but you will schedule the events shown in blue.

For example, you will schedule a planning meeting with your co-facilitator (#5) at a mutually convenient time after the second training and before the Peer Team Launch event (#6), where you will meet your team members for the first time. At the launch you will work with your team to schedule your first independent peer team meeting at a time that works for all of you (#7).

What you will find in this manual:

- Pre-readings, some required for all facilitators, and others optional for alumni of the MIND program (optional readings are asterisked in the table of contents).
- Exercises we will do together at the training sessions, including a mini role-play that demonstrates the functioning of an ideal peer team.
- A skeleton of planning questions to discuss with your co-facilitator (#5) before you meet your peer team.
- Sample handouts you may wish to adapt for your team.
- Detailed agendas for the Peer Team Launch (#6) and your first independent peer team meeting (#7).
- We also provide copies of select materials that we have given to this year's participants, to provide helpful context on what they know about the peer team process.

Chapter 1: Preparation for Facilitator Training Day 1

Big picture on what MIND (and your peer team) is trying to accomplish*

Grad students and postdocs typically start exploring their career options (in figure below, career exploration is depicted as green regions of blue arrows) near the end of their training at UCSF, when it is often too late for a thorough career exploration. Many end up deferring their career decision-making by accepting another postdoc, and the cycle repeats.

The MIND program was designed to help trainees begin their career exploration much earlier in their tenure at UCSF (green rectangle labeled MIND, bottom row).

Changing WHEN career exploration occurs

We do NOT expect participants to reach a firm decision on what career to pursue by the end of the MIND program. Rather, we want them to reach four program outcomes:
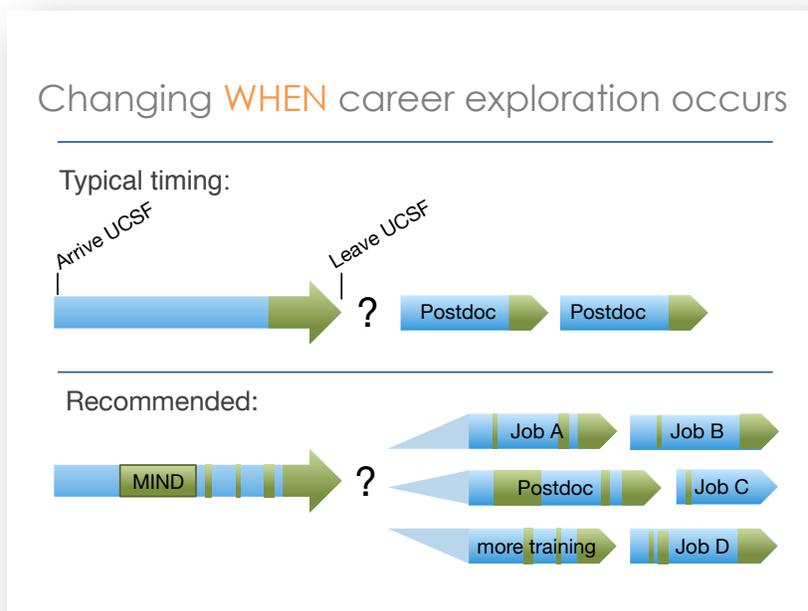
Outcome 1. We expect them to have developed the skills needed for effective career exploration, which they can use again in the future as needed. These skills are introduced in the Catalytic Course and should be practiced during the peer team experience. These include how to do informational interviews, how to network effectively, where to find readings about different careers, how to self-reflect on what they are learning about careers and how well these careers fit their interests, skills, values, and personalities, and how to synthesize that information into a decision about whether or not to keep exploring that career.   All the slides used in the catalytic course are available to you on the course website, at courses.ucsf.edu, and if you'd like to learn more about how we present any of these topics, we will be glad to talk to you.

Outcome 2. They will have explored at least 2 possible career options, which we call their "Plan A and Plan B careers." For example, someone's Plan A might be to be an industry scientist and Plan B to be a PI. <u>By June, we want them to have explored their plan A and plan B well, by which we mean: reading about these careers, talking to 2-3 people in each career and confirming that they can see themselves working with such people, and finding ways to try out typical tasks in that career</u>. Not everyone will get there, and that's ok. And as individuals explore careers during the peer team phase, a great many of them change their Plan As and Bs, and that's a normal part of the process too. We know that their career interests may continue to evolve after they leave the MIND program, so the "well-explored plan A/ plan B" can best be thought of as a working model. (Note: if being a PI is their plan A or B, we still expect them to explore that career while in the peer teams, for example by doing informational interviews with PIs at different types of institutions. Simply collecting more data for their next paper is NOT an acceptable form of career exploration.)

Outcome 3. They will have developed the beginnings of a professional network in their Plan A/ plan B fields. Many MIND participants start the year with 0 to 1 contact in their fields of interest. A major thrust of the program is to get them to expand their networks, particularly in their fields of interest. <u>We describe someone as a member of your network if (1) you have talked with them, (2) you could imagine reaching out to them again, and ideally (3) you think they might send future opportunities your way.</u> Ideally each participant would finish MIND with at least 2 of these solid contacts in their plan A/B fields. Of course, only a subset of the professionals that participants interact with during MIND will become part of their network in the sense above, and that's ok!

Outcome 4. A clear sense of what subsequent training is required for their plan A/B fields, if any. We want participants to leave MIND able to answer the following: Is doing a(nother) postdoc required for entry into their desired fields? Beneficial? Is an MBA? A law degree? An expensive certificate program? Here we are trying to prevent participants from spending needless time and money on training that won't actually enhance their employment prospects.

Why use peer teams to reach these goals?*

We believe that career options should be openly and rigorously examined, and we wanted to reduce the isolation that often shrouds this subject. We also believe that a great deal of

professional development can be attained simply by being a member of a close-knit group and witnessing, at close range, the experiences of others. One of our PIs, Keith Yamamoto, helped found the peer mentoring team described in Ellen Daniell's Every Other Thursday, and suggested that the peer mentoring structure might be a good fit.

Peer mentoring groups are used extensively in the business world (where they are often called peer mentoring circles), and have been applied in academia and government to help participants reach many different kinds of challenging goals, including writing papers and dissertations, learning supervisory skills, job search, and career navigation in general.

How participants described the value of peer teams mid-year*

Below is a brief summary and some representative quotes from a survey administered mid-year that asked participants how the peer teams were working.

The most common themes in their responses were that peer teams provided…

- ✓ Accountability
- ✓ Motivation
- ✓ Support/normalizing the difficulty of career uncertainty
- ✓ Learning about other career paths even when they were not on their original list of paths to consider
- ✓ Learning new and varied techniques for career exploration

Sample comments from mid-year evaluation, answering the question: "What has been the value of the peer teams to you so far?"

"The value has been being forced to concoct a monthly plan and then be held accountable for it. I'm not able to procrastinate as I normally would. Because of this, I've accomplished most of what needs to be done in order to move onto the next phase of my career, and it's only February!"

"It has been really encouraging to get the support of my peers in trying to figure out what my goals are. Seeing that everyone has similar fears and struggles when thinking about career exploration has been heartening. The facilitators have been a great resource both as general cheerleaders and in providing specific feedback that helps direct my thinking and pushes me to keep going."

"The peer team has been valuable in keeping me accountable for my goals. It can be easily to slack and fall behind on seeking out informational interviews, as these tasks can be awkward

and time-consuming. Knowing that I have a meeting with my team approaching pushes me to complete the goals I've set out so that I don't disappoint my peers."

"Peer team meetings are very helpful to me. Listening to other people's career exploration gives me new enthusiasm and I feel like I am not alone. My peer team has two more people who are have same goals as mine and they give me new ideas."

"The direction provided by [the facilitators] has also been helpful in turning nebulous ideas into concrete actionable tasks."

"For me, there has been great value in being asking to collect my thoughts and explain where I am and what I'm thinking about the exploration process. It allows me to approach my career exploration in a more cohesive way. Without the peer team, I think I would run the risk of conducting many, varied informational interviews without fully reflecting of what I learned from each and how they change my thinking about careers. The peer team is also a really supportive environment, and I appreciate not feeling alone in what can be a challenging and confusing process at times. I typically get frustrated with myself when I don't find an answer quickly, but the peer team environment has made sure that's not the case."

How will we know if we achieve our program outcomes?*

We evaluate this program intensively, primarily by administering surveys to participants at all the points noted on the timeline below. Blue triangles represent surveys that are part of our formal evaluation, which we report to NIH. Grey triangles represent additional surveys we do to gather formative feedback for internal program improvement. Participants also receive follow-up surveys when they leave UCSF, and some will receive surveys even in their next positions.

Selected evaluation results:

- When comparing pre- and post-MIND results, we found a significant improvement on outcomes 1, 2, and 4 (these outcomes are described on p.21).

- Networking was the most challenging part for everyone, and we also need to improve how we measure this outcome. Stay tuned!

- Despite the previous point, people seemed to make the most progress when they started doing informational interviews.

- Graduate students generally progress more slowly than Postdocs, and that's ok.

- Most participants were very reluctant to discuss their career interests with their PIs, but the majority had productive conversations when they did.

- 77% of MIND participants report improved satisfaction with their overall training experience at UCSF.

- MIND alumni have gone on to jobs as research scientists in industry, tenure track faculty, technical marketing, intellectual property, medical writing, healthcare consulting, etc.

Who will be in my Peer Team?

[MIND alums should skim the bullets and focus on the final, important note.]

MIND peer teams are composed…

- **By general availability**: facilitators and participants are polled for their timing preferences (early mornings, 9-3, afternoons, evenings)

- **By location**: at their preferred campus or within 1 shuttle of it.

- **For variety**:
    - a mix of postdocs and grad students
    - a mix of career interests
    - and with a balance of genders

- **To be a good size:** 6-7 people per team (we expect some attrition)

- **For neutrality and candor:** We want the peer teams to be a safe space in which people can speak frankly, so we separate members of the same lab and people who we know are romantically involved.

One final, important note about peer team composition…

As you can imagine, sorting 85 individuals into 14 peer teams with these principles and constraints is quite a challenging puzzle, but we do our best.

We also circulate the list of MIND participants and ask each facilitator to let us know if there's anyone you would be uncomfortable having on your team for any reason (e.g., you know them socially and don't think you/ they would be comfortable). <u>Facilitators, please respond quickly when we circulate these names.</u>

You will meet your team members at the Peer Team Launch event described on page 70.

Facilitator Responsibilities

The responsibilities listed below may be shared between the two facilitators however makes most sense for you and your facilitator partner; in some cases you may want to take turns doing something, or you may want to practice (or avoid)a particular aspect of the role. Please read through the following list of facilitator duties and consider which of them YOU would like to take on. You will have a chance to ask questions about these responsibilities at our first training, and then you will discuss them with your co-facilitator when you meet to plan your first team meeting.

Responsibilities at peer team meetings

1. To facilitate opener activities.
2. To curtail venting sessions, while normalizing the difficulty of career transition.
3. To monitor the time and ensure everyone receives the attention of the group.
4. To protect the interests of each participant (people are different, they can tolerate different amounts of questioning or pushing; watch their body language, check-in if you sense discomfort or overwhelm.)
5. <u>One of your most critical responsibilities is to ensure that everyone states concrete career exploration goals ("contracts") at the end of their part of the meeting.</u>
6. <u>And to model accountability, by asking everyone to refer back to their contracts from the last meeting.</u>

Responsibilities between meetings

1) To meet your co-facilitator before the Peer Team Launch (1/20/18) to plan your first couple meetings with the team.

2) To schedule your team's meetings

3) To tell [the Program Manager] at least a week in advance if you need a room reserved and inform [the Program Manager] promptly of any changes to your room needs.

4) To check in with your co-facilitator briefly after the first couple of meetings, to discuss how it went. A 15-minute phone call should be plenty.

5) To tell [the Program Manager] who attended each meeting (or, if you prefer, who missed a meeting).

6) To moderate any online discussion for your peer team.

7) To be the primary point of contact for individual emails from your team.

8) To flag resources & upcoming events that might be of interest to your group.

9) To notify [the Lead Trainer] or [the Program Manager] immediately if you sense any potential problems with your team (people not showing up, not seeming engaged, getting upset, etc)

Things facilitators are NOT responsible for

1. Content expertise about different careers

2. Having all the answers -- if you need back-up, post your questions and challenges to the facilitators-only discussion forum

3. Sending meeting reminders -- get a volunteer on your team to do that.

4. Reminding people to post contracts-- get a volunteer to do that as well.

5. Holding one-on-one meetings with team members

6. Counseling for mental health or job-search (contact [the Program Director], [another Co-PI], or [the Lead Trainer])

Your questions about these responsibilities?

1.

2.

Career exploration contracts

Contracts are a central element of peer team effectiveness. **A contract is a succinct and specific statement of what the person will do (with regard to career exploration) before the next meeting.** Each member of the team should set a new contract for themselves by the end of each meeting.

If you'd like to see some examples of contracts, please review the explanation we gave to participants, which begins on p. 88 of this manual.

One of your key responsibilities is to make sure people set specific and achievable contracts. You should expect that setting contracts will be challenging for people in the beginning.

We have observed two kinds of challenges with contracts:

1. Some participants have difficulty calibrating how much they can actually do, and they tend to bite off way more than they can chew. If this is gently pointed out to them they will hopefully get better at this over the course of the year. We'd rather see people successfully complete small contracts each time, rather than <u>not</u> complete huge contracts.

2. Some participants tend to state contracts in very general terms and need to be pushed a bit to define more attainable goals. SMART goals are:

   > S = specific
   > M = measurable
   > A = action-oriented
   > R = reasonable
   > T = time-bound

   Makeover example:

   Before: "I will do some reading about science museum work"

   After: "My goal is to identify roles in science museums that might be satisfying to me. To get there, I will do an informational interview with my roommate's brother, who is an exhibit designer at the California Academy of Sciences. I'll use the informational interview to determine:
   > 1. Would I enjoy this type of teaching, or are the exhibits at too basic a level to interest me?
   > 2. What background is required for becoming an exhibit developer?

Please encourage your team members to set specific contracts DURING team meetings. This can be accomplished in one of three ways:

1. By having each person state their contract verbally at the end of their allotted discussion time.
2. By reserving 10 minutes at the end of the meeting during which everyone simultaneously writes down their specific contracts, or
3. If it's not possible for everyone to articulate a crisp contract during the meeting, then set the expectation that they must do so by the end of the next day.

Then, we recommend that you print out their contracts (with last names removed for confidentiality, as per the example that starts on p.30) and bring them to the next meeting, so you can reference them (therein lies the accountability).

Sample handout facilitators make to track progress

To develop an atmosphere of accountability, which participants have told us they value, at every meeting you should review the contracts participants set at the prior meeting, discussing both what they did and didn't accomplish. We recommend bringing a handout listing the contracts on a single piece of paper; this really focuses the conversation. The facilitator copies last meeting's contracts from the CLE (or wherever your team logs contracts), then removes last names to preserve confidentiality, and brings copies to the next meeting. The following is a sample, which continues on the next page.

Sam:

Career	Goals	Tasks
Biotech	Learn more about mid-size and/or relatively stable start up companies in the Bay Area	1. Wait to hear back from Catalyst intern program
Biotech	Find out about program or operation manager careers	1. Informational interview with ex-coworker #2 2. Look into program management certifications 3. cancel linkedin premium

Aviv:

Career: Science Policy

Goal #1: Make arrangements to have questions answered about the work of the UCSF Institute of Health Policy and the people who work there.

- Arrange time with Dr. Miller
- Draft an introductory opener for Dr. Miller

Goal #2: Determine the involvement of public health dentists in policy

- Send informational interview request with Dr. Alberta Magniani to learn how she uses basic sciences PhD in dental public health

[Continued on next page]

Ellen:

Career	Goals	Tasks
Teaching at LAC	Learn new ways to encourage discussion	1. Implement an active learning technique into the next lab lecture.
CDC	Learn more about public health careers at the CDC	2. Contact other person at CDC for informational interview

Xiao Lan:

Career	Goals	Tasks
Tech Transfer	Gain hands on experience in the field Learn more about researching and understanding market analysis	2. Continue with internship at the UCSF Office of Innovation, Technology, and Alliances 3. Set up informational interview with Qi Peng
Intellectual Property	Conduct informational interviews to learn if IP fits my values	4. Set up time to talk with contacts Rob (patent agent) and Nguyen (attorney)

Jenny:

Career	Goals	Tasks
Biotech	Learn more about internships/sight visits at various biotech companies	3. Browse company websites for internships 4. Talk to contacts about possibly doing a supervised visit
Teaching	Find out about strategies for pursuing a teaching career at a PUI	4. Informational interview with Dr. Jones (Swarthmore)

[END OF SAMPLE HANDOUT FACILITATORS BRING TO EACH MEETING]

[MIND Alums: Please refresh your memory on this and pay special attention to the Confidentiality Policy on the next page.]

MIND
Motivating INformed Decisions

The MIND Program Pledge (including our confidentiality policy)

Expectations for staff and participants

UCSF's Motivating INformed Decisions (MIND) program for career exploration is a pilot program funded by taxpayers, via a BEST grant from the NIH. The MIND program comes with specific expectations for both participants and staff, which must be met if the program is to be effective, valuable and successful. Therefore, **your active and full participation is essential to ensuring that the most effective programmatic elements of MIND remain available to at UCSF beyond the lifetime of the grant** (which ends in 2018).

We expect participants to:

● *Attend all three days of coursework: October 28th, November 11th, and December 2nd, 2017*. In addition, you must complete all homework assignments. The course is cumulative, with each day building on the prior sessions, and features interactive workshops, as well as lectures. If you find you must miss one of the sessions, it is critical that you 1) tell us beforehand and 2) make up the material by reading lecture notes, completing assignments, and talking with your peers.

● *Participate fully in the career exploration peer team phase.* The meetings with your peer team, and the three full-cohort meetings (in *January 20th, March 3rd and June 23rd*), must be a top priority. You are also give your peers honest, respectful feedback, and to maintain the confidentiality of what they share.

● *Conduct informational interviews or job shadows with 3-5 PhD-level professionals* by the program end in June. These can be with people you know or people that the MIND program connects you with, henceforward called "UCSF partners."

● *Conduct yourself professionally and respectfully throughout your interactions with UCSF partners.* Behaving professionally and courteously with these individuals is key for two reasons: 1) the success of your career exploration hinges upon the generosity of these individuals, and 2) through these interactions you directly influence the relationships between the MIND program and its partners (and their willingness to give more of their time in the future!).

● *Make good use of the UCSF partner's time* by researching the given career path BEFORE you do an informational interview (by reading extensively) or a job shadow (by doing at least one informational interview with someone in that path).

● *Be active contributors* by sharing, in two ways, what you learn from these conversations: 1) with your peer teams; and 2) by entering your brief written summaries into the MIND CLE within 2 weeks of completing your informational interview or job shadow.

● ***Help us, and the NIH, evaluate the utility and efficacy of the program*** by completing the surveys and evaluations that we send to you. These surveys will ask about your experiences in the MIND program, and at UCSF, and will be kept confidential**.

● ***Be respectful and mindful of the commitment that others are making to you***, as part of the program. Your peers and the MIND staff are devoting time and energy to *your* career success, and you are expected to reciprocate by investing in the success of your peers and the program.

● Keep everything discussed during peer team meetings confidential.

● ***Stay in touch after leaving the MIND program, and after leaving UCSF, for up to five years. You should understand that you are joining a research program***: MIND seeks to understand the process of career reinvention and test strategies for navigating this transition. As such, you will be required to complete detailed surveys both during and after the program, for up to 5 years. Finally, MIND alumni will serve as the nucleus of your professional network, which will grow in the long-term to benefit your professional development!

● ***Be patient and respectful*** as we work the kinks out. While this is our fourth year, we are still incorporating new elements, and we won't get everything right. We will do our best and we are committed to continuously improving the program.

You can expect the MIND Program to:

▪ ***Connect you with at least 1 professional from our MINDbank database or via*** [UCSF Connect](#) for an informational interview, once you have completed the necessary preparation. We encourage you, of course, to conduct additional informational interviews with professionals in your own network.

▪ ***Work with you to develop one job shadow experience*** with a professional.

▪ ***Maintain confidentiality (explained more fully below).*** We will not disclose your participation to your PI, your program, or your colleagues; nor will we share any information we collect from you without de-identification and aggregation.

MIND Confidentiality Policy

There are many possible interpretations of confidentiality. Here is what we mean. You will notice that we ask for your name/email in the evaluations. We need this information so we can follow you over time, both during the program and afterward, so we can learn from your experience. This information is for our program staff and our evaluator. Any data that we share outside the project team will be de-identified and, where appropriate, aggregated. Your individual response will not be shared, and we will not discuss your participation in the program with your PI or your colleagues. We hope that ultimately you will serve as ambassadors for the MIND program, but it is entirely up to you to decide what you do -or do not- wish to share about your participation.

You can expect the MIND program to *(continued):*

➢ *Listen carefully to you.* We will read your assignments, evaluations, and discussion contributions, and consider your input seriously. We welcome your ideas and will listen carefully for ways that we can improve the program, now and in future years.

➢ *Implement changes to the program in accordance with your input* where we feel it is appropriate. We will do everything we can to make your personal experience as rewarding and valuable as possible.

➢ *Provide feedback.* Sometimes you will receive individual feedback on your assignments, and other times we will respond collectively by highlighting important themes for the cohort as a whole.

➢ *Respond to emails* addressed to **mind@ucsf.edu** within 48 hours during normal business hours.

Chapter 2: Facilitator Training Day 1

Today's Agenda

1. Peer team logistics
2. Your questions: Facilitator responsibilities
3. Exercise: Helping Participants Frame Useful Contracts
4. What does a peer team meeting look like?
   a. Basic anatomy of peer team meeting
   b. Role play of peer team meeting
5. Supports for facilitators & for participants
6. How to prepare for training day #2

Peer team logistics

Peer Team Composition:

- 6-7 participants per team:
  - Mix of postdocs and grad students
  - Teams organized by availability and campus preference, not career interests
- 2 facilitators per team
- How we build the teams
  - **We will ask you for your availability** (mornings, evenings, or midday) and preferred campus, and use this information to pair you with your co-facilitators. We will also ask the participants for the same info.
  - **Over the next month, [the Program Manager] will send you a draft of your peer team** to make sure you do not have any conflicts of interest or other issues with the people tentatively assigned to your team. Please let [the Program Manager] know ASAP if you do.
  - Both of the above will require your rapid response. Please make sure we have the best email for contacting you in December/early January.

Scheduling team meetings

- Teams typically meet twice per month for 2 hours each.

- We strongly encourage you to schedule your meetings with your peer team on a recurring basis, whenever possible (e.g 2nd and 4th Tuesdays at 10am), for two reasons:
    1. Setting a recurring meeting time saves you from endless doodle polls.

    2. Also, an important purpose of the peer team is to hold participants accountable for continued progress with career exploration, and this will work better if participants get into a regular rhythm where they know when the next meeting will be.

3. To facilitate scheduling, **please compare schedules with your co-facilitator before the peer team launch** and identify 2-4 possible dates/times when you are both free (e.g., Tuesday mornings anytime between 9 and noon, or Thursdays from 11:00am - 1:00pm.) Please note them here:

    _____

    _____

- You will then propose these times to your team when you meet at the launch. They have been told to bring their calendars, and it should be possible to select a recurring meeting time on that occasion.

- It may not be possible to find a perfect time when no one on your team has a conflict. We do NOT want to conflict with participants' lab meetings, but we cannot avoid conflicts with departmental seminars or journal clubs, for example.

Reserving a meeting room for your team

- If you need our assistance reserving a classroom, email [the Program Manager] with the time and desired campus at least 1 week ahead of time. [the Program Manager] will arrange a room and notify you of the space.

- ***It is absolutely crucial that you notify [the Program Manager] of any room cancellations* in advance**-- we have to pay for unused rooms and the cancellation process takes time because we have to put in a request.

- Please notify [the Program Manager] if there were any problems with your room (the room itself, double bookings etc.)

- Peer teams meeting at the Parnassus campus have also used small group study rooms in the library, which the graduate students on your team can reserve for you: (https://www.library.ucsf.edu/services/spaces/group)

Basic anatomy of a peer team meeting

Meeting Element	Required	Optional
Brief welcome by facilitators	■	
Opener activity (e.g., noting upcoming events of interest, or quick round of 30 second check-ins)		■
Each person asks for a certain amount of time (more when they have more to discuss, less when they don't) vs. standard model, which is everyone gets equal time in the meeting.		■
Each person talks about their career exploration activities (approx. 15 minutes each)	■	
Each person states their next contract (what they will do before the next peer team meeting)	■	
Potluck snacks and/or drinks		■
Confirm next meeting time and place	■	

Exercise: Peer team role play

*Here we provide a glimpse of how **an established peer team** might function.*

As you watch, consider especially:

1. *What kinds of questions are participants asking each other?*
2. *What are the facilitators doing? Not doing?*
3. *Do the team members trust each other? What makes you think so/not?*

Actors:

Volunteer	(playing Wang)
Volunteer	(playing Jason)
Volunteer	(playing Amrita)
Volunteer	(playing Allison)
Gabi	(playing facilitator named Gabi)
Jennie	(playing facilitator named Jennie)

Setting: This is the 3rd meeting of this peer team (in March). Everyone is gathered around a big conference table.

Setting: This is the 3rd meeting of this peer team (in March). Everyone is gathered around a big conference table.
****

[OPENING THE MEETING]
Action!

Gabi: Hi, everyone!

Jennie: Welcome! As usual, we'll start by highlighting upcoming opportunities related to the careers you are exploring. I'll start with one, and then if you've heard of any events/classes that might be especially relevant for the folks in this team, please take this opportunity to share them!

To start us off, the Entrepreneurship Center is holding an interesting looking session on intellectual property next month, for those interested in that career. I have more details here if you're interested, and I'll post to the discussion board on the class website later today.

Did anyone else see anything that looked particularly good?

Allison: Well I wanted to mention, Amrita, since you're also exploring science education careers, that last week I attended a meeting of a Science Education Journal Club, and it's a

great group. They meet monthly to discuss a recent paper in science education or science teaching, and I feel like it's going to be a good way to keep myself learning about the field...so let me know if you want to check it out with me some time.

Amrita: Thanks!

Jennie: Great. Can you email the announcement?

Allison: Sure!

Jennie: Anyone else? [silence] All right, who's ready to dive in?

Allison: I'll go. [Everyone shifts their gaze to her.]

****

[VIGNETTE 1]

Allison: "Ok, so my contract from last time was to do an informational interview with John Sawyer from Exelixis and write-up some brief notes about what I learned about project management roles in pharma (my plan A).

I did the informational interview, and it went well. He stressed that one of the most important skills for a project manager is the ability to work well with people who have different training and different mindsets. That part seems challenging, but in a good way that could play to my strengths.

Wang: How so?

Allison: Well I'm pretty extroverted, but I've had to learn to work well with all the introverts in my lab, and it's kind of a fun puzzle to figure out how to reach different people and get them engaged. So I think that part of the job would be a good fit.

Wang: Gotcha.

Allison: But he also shared that people typically <u>don't</u> go straight from academia into project management roles. Usually, you start with a role at the bench for a while, before you get tapped to do project management. So now I have to figure out what type of bench jobs would be good entry-points for me into pharma, and what are the opportunities around Boston, since my husband and I would like to move back there after my postdoc.

Gabi: Great. 5 minutes left. Time to create your next contract.

Allison: OK, in terms of next steps, I want to grow my network in pharma, so I'm going to attend the next meeting of the Bioscience Forum in South San Francisco. I'd ideally like to talk to industry scientists with backgrounds in signaling, like me, but I'm not sure what is the best way to find them-- actually I'd appreciate suggestions. I'm also going to do some web-research on Boston-based pharmaceutical companies.

Jason: You mentioned wanting to find folks with signaling backgrounds who are in bench jobs. I have a couple friends locally who really like their industry jobs. One's at Novartis, and the other's at BioMarin, and I'd be happy to put you in touch with either of them.

Allison: That'd be great, thank you! I'll follow up with you afterwards.

Gabi: Ok, so what part of this are you going to do before our next meeting?

Allison: I'll find out when the Bioscience Forum meets next, I'll do an hour or two of web-research about Boston-based pharma companies, and I'll ping Jason to get contact info for his friends.

Gabi: Sounds good!

****

[VIGNETTE 2]

Jennie: Great. Who's next?

Wang: I can go. So my contract from last time was to (1) read two articles on what it's like to be an intellectual property attorney (my plan B at this point), (2) identify who my next informational interview should be with, and (3) send an invitation out.

I read the chapters on intellectual property. One thing that came across very clearly from Toby Freedman's book-- is that I really need to decide whether I'm willing to go to law school. Apparently the way it works is that PhDs can become patent agents who write lots of patent applications, but that's about all they can do without a J.D., and they aren't paid as well. It does seem like there are lots of other career tracks possible within intellectual property if I'm willing to go back to school [looks strained].

Allison: Am I right in sensing that you aren't very excited about the prospect?

Wang: Yeah. Freedman advises going to the very best law school you can, full-time, and it usually costs over $50K a year. I'm not convinced that it's worth all the time and money and being a student all over again!

Honestly I was kind of turned off by what I read and didn't end up requesting an informational interview with anyone in law.

What do you guys think? Is it reasonable to drop this career possibility at this point?

[Silence, while everyone looks at each other, absorbing the fact that she's just asked them a question with big ramifications.]

Jennie: What questions would you ask Wang to help her sort through this decision?

Amrita: Ok, well-- setting the lower pay aside for a moment--how interesting did you find the actual work that patent agents do?

Wang: I wasn't that excited about it. One thing that really surprised me is that according to the Freedman chapter, 90% of patent applications submitted to the USPTO are rejected and then have to be negotiated back and forth three or four times. Sounds like dealing with reviewers, which is NOT my favorite part of publishing papers. And I hate the thought of being stuck in the patent agent role without any possibility of advancement unless I get a law degree.

Jennie: Do I remember correctly that part of what got you interested in this career in the first place was the challenge of writing up technical material in clear language?

Wang: Yeah.

Jennie: Does that still excite you?

Wang: Yes, I've just realized that the audience matters to me. I don't find it as motivating to imagine writing for a single patent officer at the USPTO. I want a bigger audience! A broader audience!

Jason: Do you lean towards writing for an audience of scientists, or patients, or the general public?

Wang: Hmmmm….I would love to be able to demystify medical practices and research for patients.   That would be so satisfying--- I wish someone had done that for my mom when she was sick. THANK you for that question, I hadn't thought of it that way!

Gabi: Sounds like an important insight. You've got 5 minutes left. So what are you going to do for your next contract?

Wang: Ok. I'm going to give myself permission to abandon I.P. as my plan B, and instead, I'm going to start exploring jobs in which I could write for patients. To be honest, I'm not totally sure where to start.

Amrita: I've seen some good writing on the American Cancer Society website, maybe you could check out the writing on a few other foundation websites, and see if it strikes a chord?

Wang: That's a great idea. So by next meeting I'll visit the AMWA website and see if they describe different careers in medical writing. I'll also visit the ACS website and the PanCan site, and read a few of their articles to see if I can find the kind of writing I'd like to be doing.

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Gabi: Any feasibility concerns, folks?

[shaking of heads]

Jennie: Great work, everyone! Remember that ruling a career out is also progress, as long as you use the experience to refine your working model of what you are looking for. Who's next?

****

[VIGNETTE 3]

Jason: I'll go. I have good news! I finally got a response from someone at Gilead! Thanks so much to everyone who gave feedback on my interview request email draft! You really helped make my request tighter and more tailored, and I'm sure that helped. Anyway, I got a response from Dr. Messen and she and I are going to talk by phone next week.

Allison: Congratulations! Do you feel ready?

Jason: Not really.

Allison: [chuckling] What do you need to do to get ready?

Jason: Well, I'm thinking I need to read her LinkedIN profile more carefully, and… I have to decide how I'm going to describe my interest in regulatory science. It's a pretty new interest of mine, and I'm afraid she won't take me seriously, 'cause I don't have much of a track record.

Wang: I get that. It feels weird to put yourself out there when you're not an expert. But it seems to me that you've actually done a lot to explore this career, right?

Jason: Yeah, I guess so. I did take the course on regulatory affairs. And I've been doing an internship at UCSF's CERSI, but it's only part time...

Jennie: Does anyone have ideas for Jason about how he could present his interest in regulatory science in the best light in his opening spiel?

Amrita: Can you remind me what CERSI stands for?

Jason: Sure. It's the Center for Excellence in Regulatory Science and Innovation, and it's a collaboration between UCSF and Stanford.

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Amrita: Ok, so she might know of it.

Jason: Yeah!

Amrita: So I think you should briefly state (in case she's forgotten) that you are a postdoc at UCSF who has been exploring careers in regulatory science, and that you've really enjoyed the projects you've been doing with CERSI. And then ask some focused questions that demonstrate you've thought a lot about this subject and you're not a total newbie.

Jason: You mean, not the real generic stuff like "what do you do in a typical week?"

Amrita: Yeah. Show you've done your homework, and ask some more focused questions. Ask for her take on a recent trend you've read about in her field.

Jason: Makes sense.

Gabi: [breaking in] You've got 5 minutes to frame your contract.

Jason: Ok, I'm going to prep for the informational interview, do it, and write her a thank you. That's really all I can handle.

Jennie: That's plenty! Great. Ok, Amrita, it's all you.

****

[VIGNETTE 4]

Amrita: OK, well, I've been super busy. I presented at the Gordon conference last week and basically spent every waking moment getting my talk together. So I didn't reach out to anyone in business development.

Allison: Did you meet anyone interesting at the Gordon conference?

Amrita: Well actually I met this great woman from Hyderabad who has a lab now at the Riken Brain Science Institute, and we talked for over an hour after one of the sessions. I hadn't really considered working in Japan, but she got me thinking…

Jennie: So good to remember that every scientific conference is a great opportunity for networking and career exploration.

Amrita: Except that I was supposed to be exploring my plan B, business development.

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Jason: Actually I have a question about that: haven't most of your contracts been focused on your plan B? What's happening with your plan A?

Amrita: You mean, being a PI?

Jason: Yes!

Amrita: It's still a dream….

Gabi: Have you talked to your PI about it yet?

Amrita: [looks slightly pained] We talk…. about... papers, yeah.

Wang: But not about career stuff?

Amrita: No!

Wang: Scary?

Amrita: Yes! [breaking into a relieved smile]

Gabi: I think he'd be immensely supportive…

Amrita: I do too, but… I was waiting til we get the next paper out...so far I only have a review out of my postdoc.

Gabi: Is the project you are working on the one you would use to launch your lab?

Amrita: Probably not. What I'm working on now would be pretty hard to get funded. But I have an idea for a side project that might work well ...

Gabi: Well, I don't know if it has to be in the next two weeks, but before too much more time goes by, you are going to need to talk to your PI, tell him what your plan A is, and enlist his help. Is that something you feel like you could take on?

Amrita: Maybe…. Or I could do my contract from last time and set up another informational interview with someone in business development.

Wang: Yeah, but haven't you've already done a few of those? Seems like you have the most to gain from talking to your PI.

Amrita: I think you're right.

Gabi: 5 minutes. What are you going to take on?

Amrita: I'm going to talk to him and tell him that being a PI is my plan A. I'm sweating just thinking about it. And I'll also reach out to someone in business development….

Jennie: Actually I think that talking to your PI would be MORE than enough for the next couple weeks. It clearly demands a lot of courage.

Amrita: Ok.

Jason: Tell us how it goes!
****

[MEETING WRAP-UP]

Gabi Ok, that's everyone today. Our next meeting will be March 23rd, same time, same room. And I think I have down, Wang, that you are bringing snacks next time. Does that still work?

Wang: Yep!

Gabi: Thanks. Great work everyone! Keep it up!

Exercise: Helping participants frame useful contracts

One of your most important responsibilities is to help your team members set realistic career exploration goals for themselves. In the MIND program, these goals are stated as a "contract" (described on pp. 28). **A career exploration contract is a succinct and specific statement of what the person will do (with regard to career exploration) before the next meeting.**

What follows is a collection of *real contracts written by MIND alumni*. Some of these example contracts are quite specific and concrete, and focused on a clear goal. Others are much more vague. Unfortunately, vague, unfocused, or overly ambitious contracts can lead to career exploration efforts that are overwhelming and unproductive. So part of your role as a facilitator is to gently push people towards stating focused, feasible contracts.

> *"No problem can be solved until it is reduced to some simple form. The changing of a vague difficulty into a specific, concrete form is a very essential element in thinking." - J. P. Morgan*

> *"Never try to solve all the problems at once — make them line up for you one-by-one." - Richard Sloma*

*To practice this skill, please read each contract below. If you think the contract is too vague as stated**, try to think of a question you could ask the person** to help them frame a more specific or more useful contract.*

4. **Plan B: Exploring careers in Industry**
   Task: Reading about different positions and research job postings

5. **Plan A: Business Development in Biotech**
   GOAL: Increase my knowledge about news and current events in the biotech sector
   TASK: Identify and read online publications regarding business news in biotech/pharma (ex. GenomeWeb, Biospace)

6. **Plan B: Consulting companies**
   Goal: Define the region and company of interest
   Tasks: identify the desired placement for a consulting career (Europe or the US). Identify the area of interest (biotech consulting vs. IT consulting). Define the companies to apply to. Identify possible connections.

7. Here are my goals for the near future:
   ▪ Activate consulting-related part of my network, and make sense of my network in general
   ▪ Try to set informational interviews with consultants, in particular from smaller firms.
   ▪ Read the book "Succeeding as a Management Consultant" written by the guys from Firmsconsulting
   ▪ Work on my LinkedIn profile.
   ▪ Restart practicing solving cases.

8. **Plan A: Patent law**

Action: Identify people on LinkedIN to email for an informational interview

9. **Plan B: Patent law**

   Action: Get contact info for patent attorney who had a family while going to law school. Hold an informational interview.

10. **Plan B - PI**
    Action: I will finish collecting the data for the last figure of my paper.

11. **Plan A - PI**
    Goal 1: Expand and strengthen my network
    - Register for a conference
    - Talk to people (at least 1) at the Center for Systems and Synthetic Biology meetings
    - Write to 3 of my mentors in China
    - Reconnect with at least 5 people I met at meetings last year

12. **Plan B - medical writing.**
    Goal 1: Make sure I can be hired :)
    - Action: submit my documents for the final round of green card application.
    Goal 2: Gain experience talking to recruiters & improve understanding of desired qualities
    - Action: Interview with the recruiter - go through phone screening and ask:
      - What are you looking for in a candidate that you are selecting?
      - How do you test the candidate's ability to efficiently communicate? Do you give test assignments?

13. **Plan A: Data Science**
    Task 1: Continue working with SQL. Learn to identify most recently uploaded genomes to NCBI.
    Task 2: Create a prioritized list of goals for paternity leave.

14. **Plan A: research in industry, focusing on medical device companies.**
    Goal: Prepare for informational interview with Medtronic contact on Tuesday, 1/24
    Task: Reflect on my own experiences performing research in academia, working as an engineer in industry, and tinkering as a hobbyist at home. Figure out what matters the most to me in a career (e.g. tasks I most enjoy/dislike, working environment preferences, etc.), using IDP to facilitate. Revise list of questions accordingly.

15. **Table form:**

Career	Goals	Tasks
Tech Transfer	1. Gain hands on experience in the field 2. Learn more about researching and understanding market analysis	1. Apply for internship at the UCSF Office of Innovation, Technology, and Alliances 2. Speak with Alice about marketing research

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Resources and supports for facilitators

1. **MIND Program 2017-2018 Course website:** https://courses.ucsf.edu/ (slide decks, career-specific discussion forums, and facilitators-only discussion forum)

2. **Second facilitator trainings – choose one:**
   a. 1/16/18, 11:00am-1:00pm, Mission Hall 1108 (Mission Bay)
   b. OR 1/18/18, 11:00am-1:00pm, CL 215-216 (Parnassus)

3. (Optional) **facilitator check-in meeting** (late February, date tbd) at which you can compare notes with other facilitators, trade strategies, etc.

4. **Communicate with us!** The peer team phase of the MIND Program is generally viewed quite favorably by participants (p. 23). However, issues can and do arise in the MIND peer teams, and MIND Program staff are here to support you and your co-facilitator when they do. In rare cases, personality discordances have arisen, but the most common scenario each year is that a member can no longer participate in the peer team due to extenuating circumstances (health issues, lab obligations, family matters, new job, etc). Sometimes the team member communicates this fact with the program first, in which case we will notify you ASAP. Likewise, we would appreciate if you let us know ASAP whenever you learn of any issues.

   We are always available to consult with you:
   a. [Program Manager Name and email]
   b. [Program Director Name and email]
   c. [Co-PI Name and Email]

5. [The Program Director or Co-PI] **will observe *at least one* of your peer team meetings to observe and lend support.** We will work with you to schedule this observation for a time that would benefit your team. We will also ask you in advance what type of feedback you would like to receive (tips on guiding conversations, group dynamics, etc.) and will meet with you afterwards to discuss our observations.

6. **Resources and referrals for participants** (p.49).

Resources and referrals for participants

There may be situations where a trainee comes to you with an issue that requires additional or specialized expertise. Below is a list of resources available to UCSF students and postdocs. If you think a trainee would benefit from additional assistance, or if you would like any additional advice or support in your role as a facilitator, speak with [the Program Director] or [Lead Trainer].

For Everyone

Office of Career and Professional Development (OCPD)
To schedule a one-on-one appointment, visit http://career.ucsf.edu/phds
You may e-mail us at ocpd@ucsf.edu, or call us at (415) 476-4986

Office of the Ombuds
"alternative dispute resolution services that are protected from disclosure"
http://ombuds.ucsf.edu/
Maureen.brodie@ucsf.edu, 415-502-3272

For Postdocs

Faculty and Staff Assistance Program (FSAP)
https://hr.ucsf.edu/hr.php?org=c&AT=cm&S=Faculty+and+Staff+Assistance
fsap@ucsf.edu, 415-476-8279

Most postdocs have Health Net coverage, which includes mental health services
https://clients.garnett-powers.com/pd/uc/mental_pharm_chiro_benefits/

For Students

Student Health and Counseling
http://studenthealth.ucsf.edu/
415 476-1281
Mental Health Care providers: http://studenthealth.ucsf.edu/mental_health_profiles

Chapter 3: Preparation for Facilitator Training Day 2

Homework

- Add a photo to your MIND course site profile if you haven't already. Visit https://courses.ucsf.edu/, select the course called "MIND Program 2017-2018," and then look for the "Administration" block in the bottom left of the screen. Finally, select "My Profile Settings" > "Edit Profile", and then scroll down to the photograph section.

- Required reading: pp. 50-63. Bring your questions to the second training.

- (Optional) Reading: "Career GPS" article in which 4 scientists describe the impact that participating in a peer mentoring group dedicated to "goals and problem solving" had on their professional trajectories.

- If you are NOT an alum of the MIND program:

    1. Please read "Glossary of MIND terminology" (starts on p.60) to see what we mean by the terms we use in the program.

    2. If you are not familiar with the myIDP tool, please skim the website: <http://myidp.sciencecareers.org/> While you won't be responsible for doing anything with myIDP, all the members of your peer team will have completed the myIDP and you may find it useful to know about the skills, interests, and values self-assessments.

    3. Your peer team members will be taking the Meyers Briggs Personality Type Indicator (MBTI) test and may allude to their results during your peer team meetings. If you have not had a chance to take the MBTI and wish to, please let [the Program Manager] know and he will send you instructions. For a brief overview of the MBTI test, Bill recommends this site: http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/

What to Expect – Facilitation tips and reassurances

1. The facilitator role doesn't necessitate being a counselor, an expert, or a judge. Your role is to keep the process moving forward, but you ***don't*** need a lot of content knowledge to do this effectively.

2. It is useful to ask participants to explicitly reference their plan A/plan B career as they talk, because it's easy to lose track of what career they are discussing.

3. You may be unfamiliar with a field or career that a participant is exploring, which is a good indication others in the group might also be unaware of it (e.g., business development). Take a moment to ask the participant to briefly define the field.

4. Similarly, participants might use terminology/acronyms that are specific to the fields they are exploring, in which case you should ask them to define them so everyone can follow (OTM = Office of Technology Management, etc). You might add this to your ground-rules.

5. Some participants seem interested in mapping out all the different possible niches within a career area. ("What are all the different contexts in which i can do science education?") Here are a few suggestions for how they can do this:

   a. *The myIDP website, at* http://myidp.sciencecareers.org/
   b. *Career Opportunities in Biotechnology and Drug Development,* by Toby Freedman (available through OCPD's library); for mapping out different roles in industry (both at the bench and not)
   c. *Professional Societies*; society websites can help people efficiently discover different branches of a field.

6. Serving as a facilitator requires a combination of approachability and professionalism. We encourage you to consider the following boundaries:

   a. Limits on your availability are entirely appropriate (e.g., I won't answer emails on weekends). Do share these limits with your team at the outset.
   b. No dating your peer team members while they are in the program, please.
   c. Be mindful about even casual physical touch during meetings.
   d. Please dress in a way that will not be distracting to you or others.
   e. When in doubt, communicate, communicate, communicate with [the Program Manager], [the Program Director], or [the Lead Trainer]! We're here to support you.

What to Expect – Career exploration process

1. The MIND program is career-neutral. Participants are considering a variety of options, and the MIND program is designed to support exploration of all these. Many in the previous cohorts have decided to pursue careers in industry, or intellectual property, or science communication; others recommitted to pursuit of a tenure track position; others are pursuing creative writing. We celebrate all of those outcomes equally. Most important to us is that participants explore enough to make a well-informed decision about what is going to be right for THEM.

2. Career reinvention takes time! For most people, the process of making a big change of career direction takes 1-2 years, although it can be accelerated if you devote more time and energy to it. Time is one of the biggest concerns MIND participants had last year, as they juggled career exploration with research and other commitments. When only small steps are possible, remember even these are valuable!

3. Career exploration is challenging, and we designed the MIND program to address some of these challenges. A concept from transition psychology inspired both the idea and the timing of our peer teams.
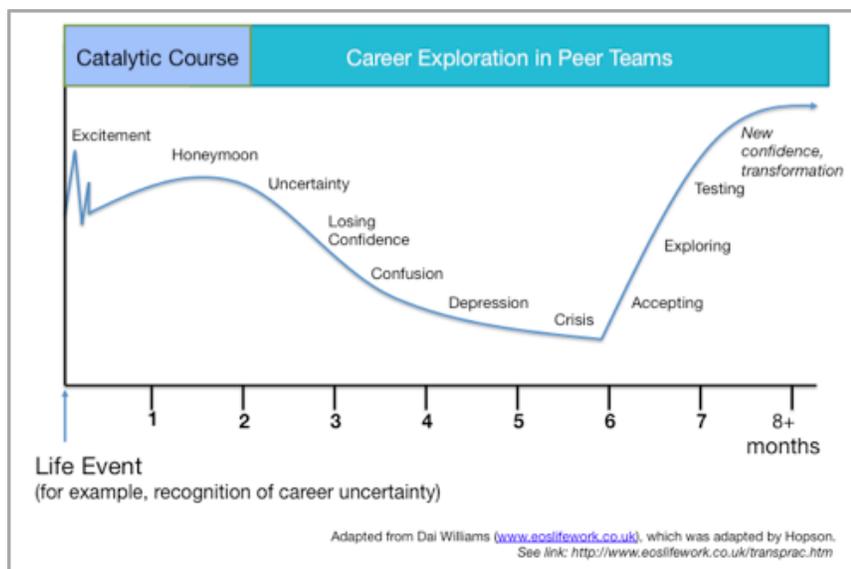
Figure 1: Features of a Career Transition Cycle. A theoretical, rather than empirical, representation of some people's experience of career exploration.

For a brief review of the reasons why career reinvention can be so challenging, please consult "Known challenges and pitfalls of career reinvention" on p.53. We share this list not to be pessimistic, but because reading it may help you more quickly diagnose and normalize the difficulties that people in your teams might encounter.

Known challenges and pitfalls of career reinvention

Excerpted and paraphrased from Ibarra's *Working Identity* book

1. <u>Spending too long reflecting before you try something:</u>
   - "A great danger lies in devoting months-- worse yet, years-- of self-reflection before taking a first step."
   - "By far the biggest mistake people make when trying to change careers is to delay taking the first step until they have settled on a destination…"

2. <u>Difficulty letting go:</u>
   "The reinventing process is rarely quick or easy, even for the veteran job - hopper. Emotionally, it is hard to let go of a career in which we have invested much time, training, and hard work. Letting go is even harder when the alternatives remain fuzzy. And yet there's no avoiding this agonizing period between old and new careers: A transition can begin years before a concrete alternative materializes, as we start creating and testing possible selves."

3. <u>The fractal nature of career transition, where every exploratory activity (info interview, article, etc.) creates many more to-dos:</u>
   "One of the most striking things about June's in-between period was just how crammed with activity it was. Certainly she was doing the job of ending. But to get from the "in-between" to a "new beginning" we have to do much more than end well; we also have to create the possibilities that might replace what is being lost and find ways of evaluating the alternatives generated. As June's remarks about how to spend her Sunday show, when we are both fully engaged in the old role and trying to create a new life, we have a lot to do. During the between-identities period, we feel torn in many different directions. Although there are many moments of reflection, this is not a quiet period: a multitude of selves- old and new, desired and dreaded-- are coming to the surface, noisily coexisting."

4. <u>It can be so uncomfortable to be between professional identities that some people don't stay in career exploration mode long enough.</u> It can be hard to resist the urge to throw yourself into the job market right away, or to decide on your career destination right away.

5. <u>Sense of fragmentation as you start exploring but are still between identities:</u>
   "Another reason the between-selves period is difficult is that, like June, we are juggling lots of different things—not necessarily with great coherence or consistency—often while still working full time at demanding jobs. In evolutionary terms, we are "increasing variety. [variation]" But, as our possible selves are fleshed out in deeper color and character, we begin to feel fragmented, not whole. We sometimes feel like an imposter in some, if not all, of the different lives we are leading."

6. Difficulty ruling possibilities out:

"As our possible-selves list grows beyond an intellectual exercise, we must next establish some means of selection. At first, the many possibilities are exhilarating. But most people simply cannot tolerate such a high level of fragmentation for an extended period of time. The time comes to reduce variety, to discard some possibilities, and to select, among them, a new favorite. How do we make the cut? We use information from two sources: our gut (our emotional reactions) and the people around us (their responses to our trials and efforts)."

7. Sense of disconnection to prior communities and colleagues:

"Long before we start exploring alternatives, we also begin to disconnect socially and psychologically. A slow and gradual shift in reference groups—relevant points of comparison—starts to take place. June, for example, began to identify with the values, norms, attitudes, and expectations of people working in the business world and began building relationships with people outside academia."

8. Feeling like you don't belong in the new career:

"At first, she felt like an interloper... Her interviewers would realize she did not have one iota of math training. She worried about coded signals, the unspoken rules of the game, from how to write her resume to how to dress. She came from a field in which embroidered language was not just tolerated but rewarded and was surprised when early interviewers signaled their displeasure at her long-windedness. With practice, she learned. 'The problem is not that I don't have a background in finance. It's that I haven't fully understood, in its entire nuance, the culture in which I want to live. With each interview, each email, each phone call, I understand better what to do-- and when to do nothing."

9. Feeling disappointed when you realize you DON'T like a career you've been fantasizing about:

"Actions that reveal vividly and clearly who we don't want to be are important but insufficient."

10. The amorphous/unstructured nature of career transition:

"I need something to give me some structure while I figure this out…"

Strategies for potential facilitation challenges

Challenge 1: Silence. No one is talking.

Issues to consider: Maybe the group contains a lot of introverts who don't typically speak much. Maybe people are engaged but thinking hard, rather than talking. Maybe the speaker seems a little lost and their teammates are not sure what kinds of comments will help.

Strategies:

1. Remember that silence is not necessarily bad; it can be productive.
2. If a participant poses a question to the group and no responses are forthcoming, you can:
   a. Ask the group "What questions do you have for Sarah?"
   b. Ask people to write down one idea, and then share. This gives people time to collect their thoughts and rehearse what they might say.
   c. Use eye contact to invite contributions (some folks won't speak up unless you turn in their direction).

3. If the speaker doesn't pose any particular questions to the group, or seems scattered, you might gently interject:
   a. "So how can we be most helpful to you right now?"
   b. "What's the next question you need to answer for yourself?"
   c. "So what's your priority at this point?"

Challenge 2: One person talks too much.

Issues to consider: They may not be aware they are doing a disproportionate amount of talking. Or they may know they tend to do this.

Strategies:

7. Preventative: At the first meeting, caution your team to be aware of their natural participation frequency: if they tend to not speak up, they should push themselves to enter the conversation more often; if they tend to speak up a lot, they should challenge themselves to filter some of their comments or save them for later or for the peer team discussion forum.
8. If someone is piping up too often:
   a. Invoke the time constraints to move forward: "Good point. We only have 7 minutes left and I want to make sure we are really meeting the needs of the [speaker name, turning your gaze to them]. What's your goal for the next 2 weeks?"

b. "OK. I want to make sure [speaker name] gets input from everyone. Let's hear from someone we haven't heard from yet…"

c. "That's an interesting point. Now let's see what other people think."

d. If it's a pattern, you might check in with them off-line and say "I really appreciate your contributions. It's clear that you are really engaged and thinking hard about this stuff. I would love to see if we can get input from some of the quieter folks on the team, to encourage some wider participation, and it would be great if you could help me with this. So that we don't lose your additional questions or thoughts, it would be great if you could write them down to share on the discussion forum. "

Challenge 3: People seem to be losing momentum. They aren't posting contracts or aren't doing them, or aren't showing up.

Issues to consider: People have lots and lots going on in their scientific and personal lives. They may be feeling frustrated about their progress.

Strategies:

1. Please consult [the Program Manager], [the Program Director], or [the Lead Trainer] so we can help you strategize.

2. Check in with people individually, via email. "You didn't make it to our peer team meeting and I just wanted to see if you are ok? You were missed." (It's even more powerful if one of their teammates checks on them too.)

3. Review, as a group, what different members of the team said that they personally find motivating (part of discussion at peer team launch). You could say "people seem to be losing momentum, which happens from time to time. I'd like each of you to take a couple minutes to think back to what you told us at the peer team launch of what kinds of things motivate you, and what helps you get un-stuck."

    a. Consider asking everyone to write down one thing they could do to regain some momentum, and then share it.

4. Last year one of the things that people said was motivating was success stories of students/PDs who have made a transition and are happy with it (part of why we brought in a panel of such people on Saturday 2). We'll try to share some more success stories via the facilitators-only discussion forum.

5. Share encouraging, inspirational quotes - we'll try to share some via the facilitators-only discussion forum.

Challenge 4: Someone is doing something on their phone or laptop.

Issues to consider: They don't realize how disruptive this can be. Or they are dealing with an emergency.

Strategies:

1. Preventative: This year's cohort told us, on Saturday 1, that "Not being engaged and paying attention" undermines an atmosphere of respect. At the first meeting of your peer team, you might take a moment to remind them that this was one of their own ground-rules.

2. Take them aside after the meeting and check-in with them:

    > "I noticed that you were on your phone today for the last half hour of the meeting, and I just wanted to check in about that. Are you dealing with an emergency? Oh good. I wanted to make sure you are ok, and I also wanted to let you know that when you are on your phone it's actually pretty noticeable and distracting, and a lot of people interpret it as a sign that you are checked out and don't care about what they are saying."

Challenge 5: Someone makes themselves vulnerable by revealing something quite personal (I'm depressed, I'm going through a divorce, I'm having an especially tough conflict with my adviser, my dad is terminally ill, etc).

Issues to Consider: They may feel relieved to have shared this information, or embarrassed, or a bit of both. Other group members may feel quite uncomfortable.

Strategies:

1. In the moment: Acknowledge. "That sounds really rough." Normalize. "Probably many of us have hit some rough spells, or faced similar challenges. You aren't alone in this." Affirm the confidentiality of what they've shared. "You can rest assured that we will keep this information confidential." Tell them you'll follow up. "I'd like to follow up with you after the meeting to make sure you have the support you need." Turn it back to career exploration. "So where does that leave you with respect to your career exploration? Do you want to try to think of a small way to keep making progress on your career exploration, or do you need to put that on hold?" Follow their cues.

2. Afterwards:

    a. Get in touch with [the Lead Trainer], [Program Director], [or another Co-PI] if you would like assistance, advice or support.

    b. Follow up with the person by email: ask if there is anything the team can do to help.

    c. Refer to the "Resources and referrals for participants" handout on p. 37.

3. At the next peer team meeting: check in right before the meeting to ask if the person would prefer to discuss, or not discuss, their situation. This may be an instance where allowing people to requesting variable amounts of time could be helpful.

Challenge 6: Someone gets upset in a peer team meeting.

Issues to consider: We all have many stressors in our lives. The source of the person's upset might lie completely outside the peer team, yet will affect their behavior

in the team. Also, different people can tolerate different amounts of pushing and prodding from their facilitators/teammates.

Strategies:

1. <u>Preventative:</u>

    a. Some groups like to do very quick (30-second) check-ins at the start of the meeting, to take the temperature of how people are doing. If someone is particularly stressed because they are about to be scooped, or are trying to get a grant in, or have tons of family in town, it might help the group to know this. They can then focus on helping the person identify one small step to move forward, and save deep, probing questions for another day.

    b. You might consider asking your team members for brief written feedback after a few team meetings. "We want to help you keep moving forward, but we also want to respect that fact that different people need different amounts of pushing. Are the group/facilitators pushing you too hard, not hard enough, or just right? Please explain your selection."

2. <u>In the moment:</u> Keep your cool. Express sympathy in a way that suits the moment - "I'm so sorry you're going through this; we hope we haven't done something to hurt you"; Restate the issue "It seems like your major concern is [not having enough time]. Is that right?" or probe to determine what the issue is "Do you feel comfortable with the suggestions that were provided, or are we getting off base?"; Consider a brief break - "let's all take just 5min to get some water/stretch our legs"; Privately ask if the person wishes to continue at this point "We would love it if you feel up to participating for the rest of the meeting but would understand if you prefer not to. We would be happy to discuss what's going on for you, or you could just listen, which would still be really valuable to the group."

3. <u>Afterwards:</u> Email [the Program Director] and [the Lead Trainer] right away and we'll make time to talk to you. We'll work with you to consider what next steps might be appropriate for the situation.

4. <u>Before the next peer team meeting:</u> Depending on the situation and the outcome, the rest of the Peer Team will likely need some measure of closure on this issue, since it could affect the dynamics of the group. Again, [the Lead Trainer] and [the Program Director] will work with you to figure out the way forward.

Phrases to move discussion forward

Encourage **other team members to help the speaker**:

- "What questions do you have for Raphael?"
- "Does anyone have a contact who Wei could talk to?"
- "Has anyone ever been through something similar?"

Questions that help participants **clarify their career exploration goals**:

- "What's the next question you need to answer for yourself?"
- "As you continue exploring careers in [science communication], what is it that you want to learn about that career? What do you <u>not</u> know about it that is still a question mark for you?"
- "You've had a tough time trying to make progress on your goal of …. Do you think you might need to reconsider that goal, or does it still feel like the right goal and something else has to change?"

If a **participant didn't achieve much of their contract**:

- "How far did you get?"
- "Let's talk a little bit about why not… Can you unpack what the challenge was?"
- E.g. they can't get a response from the person they wanted to do an informational interview with, enlist the group's help in identifying an alternate route to achieving the same goal:
  - "Can anyone think of another way that Alex could make progress towards his goal?"
  - Does anyone have a contact who Wei could talk to?"

To help participants synthesize lots of information into a decision about whether or not to continue exploring a given career:

- "Great. You've learned a ton about management consulting. If you step back and reflect, does the career strike you as a good fit?" or
- "Now that you've learned quite a bit about tech transfer, are you more excited or less excited by the field?" or

- "You've identified a list of tasks that you would have to do in that job. Do you think you will enjoy spending your time doing those tasks?"

If you sense there may be a values disconnect (i.e., the careers the person is expressing interest in may not fit their stated values), you can probe:

- "Does what you've learned about this career fit what you know about yourself? Like your values?"

- "You mentioned that one of your biggest priorities is to [have work-life balance, earn a good salary, have colleagues who will challenge you]. Does it seem like this career will meet those priorities?"

- "When you say time with family is important, what does that mean for you?"

How to tell that your team is working well

- Pay attention to the speaker's body language. You can usually see if/when they tense up or shut down. If you think you're seeing that, confirm that with them: "How does that strike you?" or "Is that idea overwhelming/scary?"

- We will include peer-team related questions in the formal MIND program exit survey next June, but we will also collect feedback from participants mid-way through the peer team experience (in March), to see what is working well about the teams and what could be improved. We will share the anonymized feedback from your peer team with you so you can decide whether you'd like to change anything for the remaining meetings. IF you would like to suggest questions for either of these evaluations, please let [the Program Manager] know. We welcome your input.

- We recommend that you collect some brief written feedback in the last few minutes of your second meeting. *A template handout for doing so appears on the next page. Just print and cut in half.*

Feedback sheet on peer team experience

The goal of this peer team is to help you make as much progress as possible on your career exploration. We know that individuals respond differently and may need different things from the team. Please take a couple minutes to give us some feedback:

1. Your name: _____
2. When I'm discussing my career exploration with the team, I'd like…

   Circle one: …more questions

                            …the same number of questions

                            …fewer questions

3. When I'm discussing my progress with the team, I'd like…

   Circle one: …to be held more accountable for what I said I'd do

                            …just right as is

                            …to be given a pass because life is especially challenging now

4. Do you have any other advice about how your teammates or facilitators can help you continue to make progress?

✂ -

The goal of this peer team is to help you make as much progress as possible on your career exploration, and we know that individuals respond differently and may need different things from the team. Please take a couple minutes to give us some feedback:

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   Circle one: …to be held more accountable for what I said I'd do

                            …just right as is

                            …to be given a pass because life is especially challenging now

4. Do you have any other advice about how your teammates or facilitators can help you continue to make progress?

Glossary of MIND terminology*

Career exploration, and the various models for career development and exploration, rely on a unique vocabulary. Below are some of the terms we use in the MIND program.

Additional academic careers
All careers undertaken in academic research or educational settings, except tenure-track faculty. Includes staff scientists, lecturers, and people who work within the university to support the research or educational enterprise. Roles include, but are not limited to: technology transfer, human subjects protection, ethical compliance, grants and contracts, career services, etc.
See also: Non-tenure track academic careers

Alternative careers
Usually refers to careers pursued by PhD level professionals, outside of tenure-track academic positions. We discourage this term "alternative careers" as inaccurate because such careers are no longer alternative: of all biomedical PhDs trained nationally, the majority do not end up in tenure-track PI positions.

Career decision
See Career decision-making

Career decision-making
A conscious decision made during career exploration to either further pursue, or abandon, a particular career path.

Career exploration experience
Any of a number of tasks undertaken to learn more about a career of interest, and that leads one to make a career decision. Typical career experiences include (in order of increasing time, and increasing depth):
● Reading about careers
● Communicating with professions, such as in an informational interview
● Meeting with professionals, such as informational interviews and job shadows
● Consultancies, contract work, fellowships
● Internships

Career exploration
The process of self-assessment, investigation, participation and reflection that is undertaken in order to identify a desirable and appropriate career.

Career path categories
Any of 20 broad categories used in myIDP:
● Science policy
● Public health related careers
● Research administration
● Intellectual property
● Sales and marketing of science-related products
● Science writing

- Support of science-related products
- Clinical research management
- Drug/device approval and production
- Business of science
- Clinical practice
- Science education for non-scientists
- Scientific/medical testing
- Combined research and teaching careers
- Principal investigator in a research-intensive institution
- Entrepreneurship
- Science education for K-12 schools
- Teaching-intensive careers in academia
- Research staff in a research-intensive institution
- Research in industry

Additional category not yet available in the myIDP:

- Academic administration

Career Track faculty
A research or teaching position without a tenure line. Stability of such positions may be dependent on the ability to secure independent funding.

Default postdoc
A postdoc done to buy time until one decides what type of career to pursue, and/or what transitional experience is necessary to pursue that career.

Informational interview
A meeting with a professional in a field of interest, in which one gathers information about the realities of that professional's job, and the experience and skills s/he developed before moving into that career. Informational interviews are best held in person, but can also be conducted by phone or via skype, and are usually 20-75min in length.

Job category
From myIDP; any of a number of positions or jobs that fall under a given career category or career path category.

Job simulation exercise
An exercise that is constructed to simulate an on-the-job situation. Such exercises have historically been used to assess candidates in job interviews, but in this context they will be a part of the job shadow experience.

MBTI
Myers-Briggs Type Indicator; measure of psychological preferences in how people perceive the world and make decisions.

MINDbank
The database of career information that MIND program participants use to find professionals of interest.

Non-academic careers
Careers undertaken outside of academic education and research settings.

Non-tenure track academic careers
All careers undertaken in academic research or educational settings, except tenure-track faculty. Includes staff scientists, lecturers, and people who work within the university to support the research or educational enterprise. Roles include, but are not limited to: technology transfer, human subjects protection, ethical compliance, grants and contracts, career services, etc.
See also: Additional academic careers

Non-tenure track careers
Careers both inside and outside academic research and education settings, but that do not lead to tenure.

Partner
A Ph.D. graduate who is pursuing a career outside of tenure-track faculty, and who has generously offered their time, expertise and professional experiences to UCSF trainees who are in the MIND program.

Trainee
A graduate student or postdoc

Trainee takeaway
A written summary of the information and lessons that a trainee derives from an informational interview experience, and posts to the course website. Also called an Informational Interview Report.

Transitional experience
An experience undertaken to develop additional skills or qualifications in preparation for a new career trajectory. Examples of transitional experiences include courses, accreditation, internships, or intermediary jobs.

Chapter 4: Facilitator Training Day 2

Today's Agenda

Your questions welcome throughout!

1. MIND program year (p. 56)

2. Plan for Peer Team Launch – Saturday 1/20 @ 11:15am (pp. 57-62)

   a. Pre-plan with your co-facilitator before meeting your team (pp. 63-66) either before Saturday or in Mission Hall 1109 on Saturday

3. Anatomy of your first independent peer team meeting (p.67)

4. Facilitation Challenges: what are you most concerned about? (Think-pair-share)

One person talks too much.

People are losing momentum, not showing up or posting contracts

Someone is focused on their phone/laptop.

Silence. No one is talking.
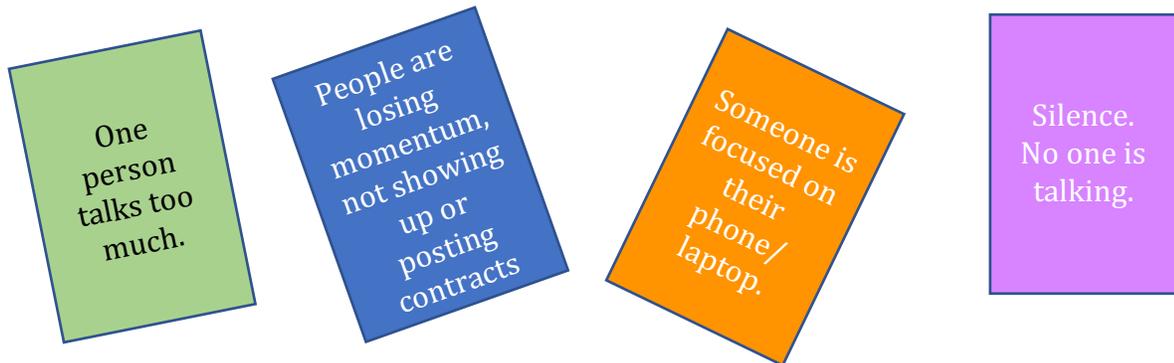
5. Resources: UCSF Connect, InterSECT Job Simulation Library, Course website

6. Additional materials in the packet

MIND Program Year

Catalytic Course

Peer Team
Launch (1/20/18)

Midyear
Meeting (3/3/18)

Program
Finale (6/23/18)

| 1 | 2 | 3 |

Peer Team Meetings
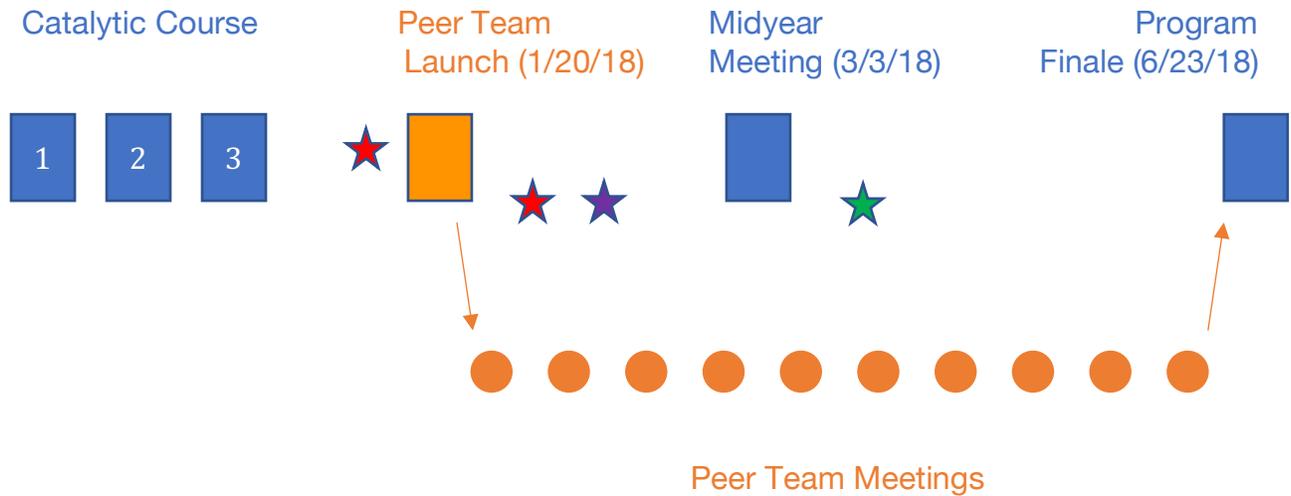
Key:

⭐ Discuss/plan with your co-facilitator (by phone ok)

⭐ Meet with other facilitators to trouble-shoot (optional, first week of March)

⭐ MIND staff visits your team to observe (at mutually convenient time)

Pre-planning with your Co-Facilitator

Estimated completion time: 30-45 minutes.

Please decide #1-5 <u>before</u> the Peer Team Launch:

1. (5-7 min) To help you schedule your February team meetings, please compare schedules with your co-facilitator and generate a list of 3-5 specific dates & times in February when you are both available for a two-hour meeting. You will then propose these times to your team when you meet at the peer team launch (please write on a big piece of paper for the launch, as shown on p. 66).

   _____   _____
   _____   _____
   _____   _____

2. (5 min) How will you communicate with your team between meetings? Where will you ask your team to post their contracts after each meeting? You have several options:
   - Email?
   - Slack channel?
   - Google group?
   - If you wish, we can create a private discussion forum on our course website: courses.ucsf.edu

3. (1 min) How will you communicate with your co-facilitator if you have a last-minute conflict or issue?
   Email?_____Cell?_____
   Other? _____

4. (5 min) Please decide **which of you will lead each component** of the peer team launch meeting, and mark up the lesson plan accordingly so you can move efficiently and seamlessly through the (very short) meeting.

5. (5 min) You and your co-facilitator should decide which of the optional components noted below you would like to include in your peer team's meetings**. The components noted in bold are required.**

- ❑ **Brief welcome by facilitators**

- ❑ (optional) Icebreaker? or Upcoming events? or Quick round of 30-second check-ins?

- ❑ (optional) Variable time model (participants ask for certain amounts of time depending on how much input they need)? Or equal time model?

- ❑ **Each person speaks about their career exploration and frames their next contract; team members pose questions, give suggestions**

- ❑ (optional) Facilitators take notes on the board?

- ❑ (optional) Potluck snacks or drinks?

- ❑ **Confirm next meeting time and place**

Please discuss #6-7 before your first independent peer team meeting (can be after the launch if necessary).

6. (5 min) Please take 2 minutes to jot brief answers to the following questions, and then share your answers.

- o "What are you excited to learn from the process of facilitating a peer team?"

- o "What is your biggest concern about facilitating a peer team?"

7.   (10 min) Facilitator Responsibilities: The responsibilities listed below may be shared between the two facilitators however makes most sense for you and your facilitator partner. Please discuss who will do what.

Responsibilities <u>during</u> peer team meetings

1. To facilitate opener activities.

2. To curtail venting sessions, while normalizing the difficulty of career transition.

3. To monitor the time and ensure everyone receives the attention of the group.

4. To protect the interests of each participant (people are different, they can tolerate different amounts of questioning or pushing; watch their body language, check-in if you sense discomfort or overwhelm.)

5. <u>One of your most critical responsibilities is to ensure that everyone states concrete career exploration goals ("contracts") at the end of their part of the meeting.</u>

6. <u>And to model accountability, by asking everyone to refer back to their contracts from the last meeting.</u>

Responsibilities <u>between</u> meetings

7. To meet your co-facilitator before the Peer Team Launch (1/20/18) to plan your first couple meetings with the team.

8. To schedule your team's meetings

9. To tell [the Program Manager] at least a week in advance if you need a room reserved and inform [the Program Manager] promptly of any changes to your room needs.

10. To check in with your co-facilitator briefly after the first couple of meetings, to discuss how it went. A 15-minute phone call should be plenty.

11. To tell [the Program Manager] who attended each meeting (or, if you prefer, who missed a meeting).

12. To moderate any online discussion for your peer team.

13. To be the primary point of contact for individual emails from your team.

14. To flag resources & upcoming events that might be of interest to your group.

15. <u>To notify [the Lead Trainer] or [the Program Manager] immediately if you sense any potential problems with your team (people not showing up, not seeming engaged).</u>

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Peer Team Launch – Facilitator guide

Agenda
Saturday January 20 2018
location: Mission Hall, 1400

Room for facilitators to pre-plan: Mission Hall, 1109

9:00AM   **Reviewing your MBTI Results**
              (facilitators are welcome but not required to attend)

11:00AM   **Break**

11:15AM   **Orienting you to your Peer Teams**
              Presenter: Gabriela Monsalve

11:30AM   **Gather in Peer Teams (Mission Hall, 1400)**
sharp!

12:30PM   **Lunch with Your Peer Team (pizza provided)**

Goals of the Launch (what will success look like?)

What follows are a lot of specifics about the launch. But the bigger picture goals are to:

1. Create a sense of enthusiasm about the peer teams! Greet people warmly. Talk about how enthusiastic you are, commend them for dedicating themselves to career exploration this year, and emphasize how much better it will be to do so with the support and investment of their team, rather than doing it alone.

2. Model how we will be very focused and productive in these meetings. That means sticking to time limits, and being concrete and concise. The first part of the meeting ("Nuts and Bolts") is meant to model this focus on the concrete.

3. Establish that the team is really there to help each individual *in the ways that would be helpful to that individual*. The "Discussion" portion of the team meeting is meant to accomplish this.

4. Schedule your team's first independent meetings.

Other hints for facilitators:

1. In order to squeeze brief meetings of each team into this launch, the timings are incredibly tight, so we need everybody to know their roles and stick to the schedule, which you should review in advance (see page 70). Please meet with your co-facilitator before the launch to decide who will lead the different parts of the meeting. We have reserved a separate room for facilitators to meet, Mission Hall 1109.

2. Start your meeting as SOON as you can, hopefully by 11:35 at the latest. Encourage your team members to sit so <u>everyone can see each other</u>, ideally in a circle. Scientists are often not used to thinking about this, but including everyone physically, and facilitating good eye contact are critical anytime you want people to bond as a team!

3. Since you will only have 1 hour with your team, the format (and the pacing) will be quite different than the regular meeting format. Please acknowledge the fast pacing and try to make it fun, but also assure your group that future meetings will allow for more discussion and more focus on each individual.

Peer Team Launch Plan and Schedule **– *Facilitator Guide***

1. **Nuts and Bolts: logistics, communication, scheduling!** **(BRISK 25 minutes)**

   o 11:35 Greet everyone (1 min)
      - "Welcome! In this meeting we'll briefly introduce ourselves and talk about some nuts and bolts, and then we'll talk about how we can help each-other maintain motivation through the next 6 months, and then we'll preview the next meeting."

   o 11:36 Both facilitators introduce themselves (2 min each = 4 min total)
      - Brief snippets about your career/ exploration and why you think MIND is important

   o 11:40 Participants introduce themselves (30 seconds each – keep it quick!)
      - Name and top two careers at this point
      - Facilitators then mention any absent team members

   o 11:45 How we will communicate in between team meetings (3 min)
      - Describe your preferred method of communication, whether email, slack, or a google group.
      - Tell them they will be using this method to post their contracts after every meeting and also to pose questions, ask for help, cheer each other on, etc.

   o 11:48 Meeting logistics- campus location & time (5-7 min)
      - Tell them what campus you will meet at
      - Select dates and times for late Jan/ February team meetings
        - Pre-select possible meeting times with your co-facilitator and write these out on a piece of paper in large letters so it can be read when you hold it up. See sample on p. 76.

Continued on the next page!

2. **Discussion: How can this team help YOU?** **(BRISK 35 minutes)**

- o 11:55 Facilitators distribute and introduce the handout called "Building the Foundation for Productive Team Experience" (2 min, possible script for introducing it is offered on the next page, we'll give you copies of the handout, which you can preview on p.75.)

- o 11:58 Participants write brief answers (3-4 min, stop earlier if they finish writing sooner)

- o 12:02 Next, each participant briefly summarizes what they wrote. (**ONLY 3-4 minutes each** depending on whether you have 6 or 7 participants. Watch the time carefully in this part.)

- o 12:24 Finally, participants give their handouts to group facilitators (if anyone really wants to keep theirs, that's fine).

3. **Closing (5 min)**

- ○ 12:25 "Look for the confirmation of our February meeting dates, times, and locations on [whatever method of communication you've chosen]."

- ○ 12:26 "By 1/25 please say a quick hello on [whatever method of communication you've chosen]. Please remind us what plan A / plan B careers you are exploring at this point, and what your motivators are (from the discussion in part 2 of the meeting). Any team members absent today will introduce themselves there as well."

- ○ 12:28 "To prepare for our first team meeting, your homework is to collect your thoughts about (a) what questions you have about your Plan A/Plan B career interests at this point, (b) what contract you will set at our first peer team meeting (Not sure what we mean by contracts? Check out the example contracts that were provided in the "Information on Peer Teams" handout from Saturday 3, on p 89). **Be prepared to briefly share your thoughts at our next Peer Team meeting.**"

- ○ 12:30 Pizza available in the lobby, and you are encouraged to eat together as a team (without facilitators) if your schedule permits. END!

Script for introducing the handout on the next page:

"Now we are going to take a few minutes to discuss some topics that will help us establish a strong foundation for this peer team so it's most useful to you.

Peer teams are *not* therapy groups, but they ARE intended to provide **encouragement** and **motivation** to keep you moving forward every month. So we want to know what YOU personally find motivating, and what we can do to help you get un-stuck when you encounter barriers at times. For this team to be most helpful to you, you need to be able to speak honestly about your career exploration activities, and we want you to feel comfortable and confident that what you say will be treated respectfully.

First you'll write some short answers to the questions on the handout, then each person will briefly summarize what they wrote, and finally you'll leave these handouts with us so we can consult them in the future."

Handout for peer team launch

Building the Foundation for Productive Peer Team Experience

Please answer the questions below so the team can help you make good progress in your career exploration efforts.

Name or Preferred Nickname:

1. Many things motivate me, but my personal top three are:

2. What does it look like when you get stuck or overwhelmed, and what can we do to help you get un-stuck?

3. What do you need from us to be comfortable speaking openly and frankly about your career exploration efforts in this group?

Anything else?

Example of scheduling aid to bring to peer team launch

Please write your name in any hour you are NOT available

Anatomy of your first peer team meeting – facilitator guide

Kicking off the meeting

Background
Facilitators and trainees will have met each other at the Peer Team Launch, but not everyone will have been able to attend.

Activity
You may want to distribute a handout (see example on p 81).

Start by welcoming the group! If any team members were not able to attend the Peer Team Launch, have everyone introduce themselves (name, lab, what has motivated them to join the MIND program). When those are done, tell everyone that today's meeting will be a bit different than the typical format, as we have some groundwork to do. Part of that groundwork is starting to get to know each other...

Icebreakers/team-building exercises:

Option 1: "Map of the World"
Goal
To get some insight into the participant's life experience and values – who and where the significant people in their lives are, any important constraints on their career options.

Setup
Using the dry-erase board, draw a rough map of the world (reference diagram provided on next page). Drawing of the map can be a team effort, or an artistically inclined peer team member could draw the full map for the group. It's ok if the drawing is terrible!

Activity
Ask each person, in turn, to go to the map and draw their trajectory while describing:
- Where were you born and where did you grow up?
- Where did you go to college, where did you do your PhD?
- Where are the significant people in your life now (family, spouses, children, best friends)?
- Where would you like to live after leaving UCSF?

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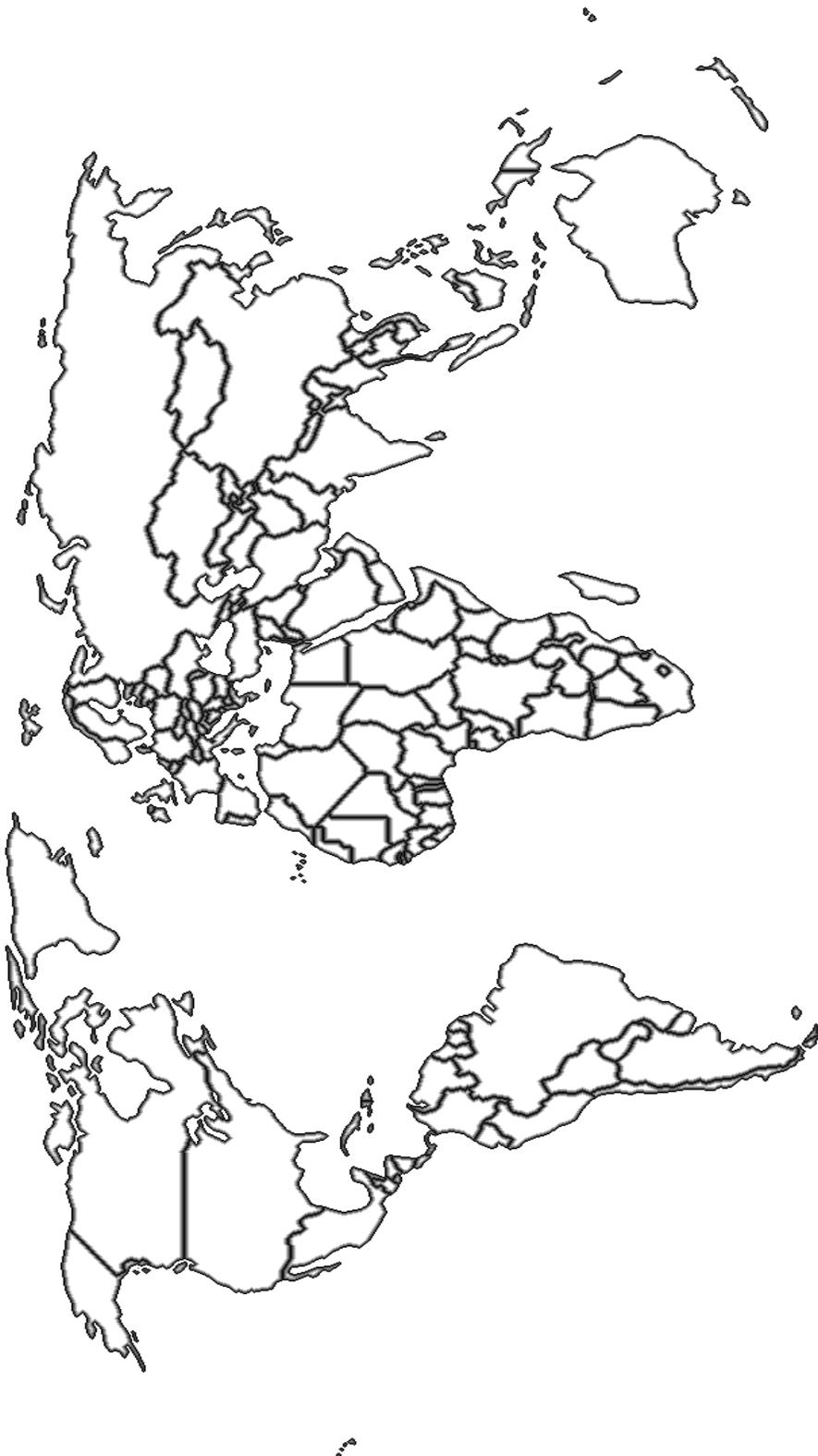
Icebreakers (continued)

Option 2: **"The best team"**

Goal

To spur your team members to reflect on what makes teams effective and fun, and to engage them in establishing some group norms for the team.

Activity

- Ask each member to jot some notes on (a) the best team they have ever been a part of and (b) why it was the best. These teams could be in any context: school, sports, religious community, musical ensemble, family, debate team, etc. Let them write for 2-3 minutes; stop sooner if they stop writing.

- Then ask each person to briefly report out. Record characteristics of these best teams on the board. This discussion will likely provide a good transition to the next section of the meeting.

Establishing clear expectations

Activity

- Hand out copies of the "*Community groundrules*" document developed by the trainees on the first day of the MIND program (p.87).

- Tell your team that it's time to set any other expectations for your smaller group.
    - Ask them: are there things that you think are missing from this list, or that are especially important to you?
    - Ask them: what limits do we want to establish around the use of technology during team meetings?

- Remind them about confidentiality. From the MIND Program Pledge (found in full on p.32):
    - **You can expect us to:** *Maintain confidentially. We will not disclose your participation to your PI, your program, or your colleagues; nor will we share any information we collect from you without de-identification and aggregation.*

- Share any parameters that YOU [the facilitators] would like to set on your availability (e.g. when you'll respond to emails)

- Be sure to document any new rules the group agrees are important to them (can record them on the board or take notes, but however you do it, you should circulate the notes).

Assigning roles and setting the schedule

Background
Facilitators shouldn't be responsible for keeping everyone on track! Setting a regular meeting time, well in advance, is helpful. Also consider asking for volunteers to do some of the tasks.

Activity
- Setting the meetings!
    - Pull out your calendars and find a regular meeting day! Consider meeting every two weeks, or on the same weeks of the month.
- Taking care of the details
    - Explain there are a few logistical things that need to happen regularly, and it would be great to have members volunteer for various things.
        - Sending reminders for the meetings_____
        - Reminding folks of whose turn it is to bring food_____
        - Notifying [the Program Manager] when/if a room is needed_____
        - Reminding people to post their contracts to the Peer Team Forum_____
        - **Note:** scribing the contracts is something that may be best to keep with facilitators, so that trainees can think and speak without worrying about writing

Diving into Career Exploration

Calculate the amount of time left per person
- Each person should:
    - Identify the one or two career paths they intend to begin exploring
    - Briefly indicate their interest in it -- what is attractive about it; what are they curious to learn about?
    - Set out at least one goal, and one task, to be completed before the next peer team meeting
- Tell the others in the group that their role is to:
    - Listen actively.
    - Ask the speaker questions - sometimes this is the most powerful way we can help our teammates.
    - Say if they think the contract (goal and specific tasks) is feasible in the two weeks before the next meeting.

END OF PLAN FOR FIRST INDEPENDENT MEETING.

Sample Handout for First Independent Peer Team Meeting

How to reach your facilitators:

john@abc.edu and jin@abc.edu

Icebreaker: Map of the world – In 2-3 minutes each, show us on the map:

- ❑ Where were you born? Where did you grow up?
- ❑ Where are the significant people in your life (family, spouses, children, best friends)?
- ❑ Where did you go to college, where did you do your PhD?
- ❑ Where would you like to live after leaving UCSF?

Assigning roles and setting the schedule

- ❑ Timekeeper _____
- ❑ Sending reminders for the meetings _____
- ❑ Reminding people to post their contracts _____
- ❑ Jargon scout –asking people what unfamiliar terms mean._____

How to make these meetings effective

OUR #1 GOAL = to keep making progress, in small or big steps. In service of that goal:

WHEN YOU ARE DISCUSSING **YOUR** CAREER EXPLORATION EFFORTS:
1. Tell us how to be helpful to you: if there's something specific you want feedback on, let us know.
2. Keep the focus on problem-solving, not venting.
3. As you speak, look at each other, not just at the facilitators.
4. Spell out acronyms (like RDO, Research Development Office) so we can all follow.

WHEN A TEAMMATE IS DISCUSSING **THEIR** CAREER EXPLORATION EFFORTS:
5. Keep your focus on what THEY need: listen carefully; ask clarifying questions; when making comments don't speak for too long without checking in to see if it's helpful.
6. If you tend to talk a ton, perhaps modulate that down a bit; if you tend not to talk much in group settings, try increasing your contributions either in person or online.
7. Use your devices as little as possible. E.g., only on laptops or phones when writing your contract.
8. Maintain confidentiality.

FINALLY:
9. We will have a timekeeper, but we are ALL responsible for adhering to time limits.

Diving into Career Exploration

Calculate the amount of time left per person: _____ minutes.

Each speaker should:
- Identify the top two careers they intend to explore
- Briefly indicate what is attractive about each career; and what aspects of that career are they most curious to learn about
- Define at least one goal, and one task, to be completed before the next peer team meeting (your contract for the next meeting)

Everyone else:
- Listen actively.
- Ask the speaker questions - sometimes this is the most powerful way we can help our teammates.
- Say whether they think the contract (goal and specific tasks) is feasible in the two weeks before the next meeting.

Next meetings:

Weds Dec 2 - 9-11am - CL210 - Parn
Weds Dec 16 - 9-11am- CL220 - Parn

[END SAMPLE HANDOUT FOR FIRST INDEPENDENT TEAM MEETING]

# Chapter 5: Selected background on the MIND program

Conceptual foundations of the MIND program

Our program is grounded in the traditional "plan-and-implement" model of career development as well as the "test-and-learn" model.
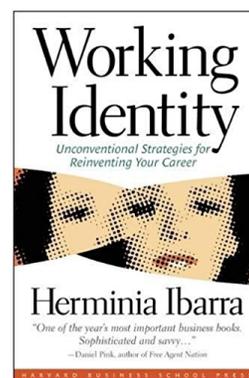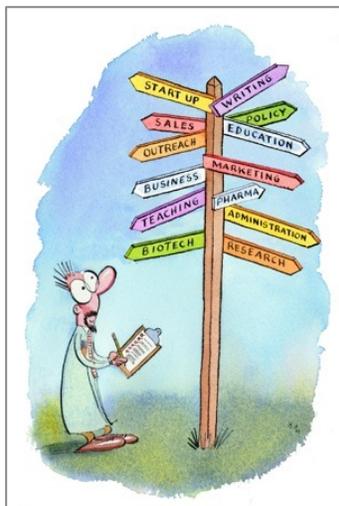
The **"plan-and-implement" model** focuses on assessing one's own skills, interests, and values, and then evaluating possible careers to find one that's a good fit. Once you've identified a career goal, you then make a plan to aquire the experience and contacts needed to enter that career. A good introduction to this approach may be found at myIDP (for STEM researchers) or Imagine PhD (for social sciences and humanities scholars).

The **"test-and-learn" model** is presented in Herminia Ibarra's book, *Working Identity: Unconventional Strategies for Reinventing Your Career.* 2003. Harvard Business Review Press, Boston, MA. Ibarra's research demonstrates that significant career changes requires the gradual transformation of one's **working identity**, through empirical cycles of 1) trying out new activities and professional roles, 2) developing contacts who can open doors to new professional worlds, and 3) reworking the story of one's career.

Actions that promote successful change — MIND

Aspects Of Working Identity	Recommended Strategies
What you do	**Crafting Experiments:** Try out new activities and professional roles on a small scale before making a major commitment to that path.
People you interact with	**Shifting Connections:** Develop contacts who can open doors to new worlds; find role models and new peer groups to guide our progress.
Story you tell	**Making Sense:** Career change requires reworking story of your career → coherent to yourself/others.

Ibarra, *Working Identity,* 2003

This Year's Catalytic Course Agendas – with new elements highlighted

MIND
Motivating INformed Decisions

Catalytic Course #1 Agenda

Saturday 1: October 28, 2017 HSW-302 Parnassus Campus

9:00AM **Welcome to the MIND program!**
Presenters: Liz Watkins and Keith Yamamoto (via video)

9:30AM **Overview of the MIND Program**
Presenter: Jennie Dorman

10:30AM **Break**

10:45AM **Coming to Terms with Job Market Data**
Presenter: Gabriela Monsalve

11:15AM **Intro to the Career Exploration Process: The Fantasy, the Ideal, and the Reality**
Presenters: Bill Lindstaedt and Gabriela Monsalve

11:45AM **Lunch**

12:30PM **Working Identity: Key to Successful Career Change**
Presenter: Jennie Dorman

1:30PM **Using myIDP to Assess your Skills, Interests, and Values**
Presenter: Bill Lindstaedt

3:30PM **Career Exploration Methods and Resources**
Presenter: Bill Lindstaedt

4:00PM **Getting ready for class on November 11 & How to use the course website:**
Courses.ucsf.edu

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Catalytic Course #2 Agenda

Saturday 2: November 11th, 2017 Location: Mission Hall, Room 1400

8:30AM   **Check-in and breakfast**

9:00AM   **Brief Discussion of your myIDP homework**
            Moderator: Bill Lindstaedt

9:30AM   **Career Cameos: Roles in Industry** - NEW!
            Presenter: Bill Lindstaedt

10:00AM   **Break**

10:15AM   **Networking Demystified**
            Presenter: Naledi Saul

11:45AM   **Lunch**

12:45PM   **Informational Interviews, Part 1**
            Presenter: Jennie Dorman

1:45PM   **Break**

2:00PM   **Panel Discussion of PhDs in a Variety of Careers**
            Panelists:
            1. Joseph Lin PhD, Associate Professor at Sonoma State University *(Research & Teaching in Academia)*
            2. John Vincent, PhD, Scientist at Guardant Health *(Industry)*
            3. Jenn Page, PhD, Director of ES Tissue Core at UCSF *(Staff at RO1 Institution)*
            4. Sophia Majeed, PhD, Clinical Pharmacologist at Gilead *(Industry)*
            5. Brad Heller, PhD - Senior Scientist, Cell Biology at Quartz Therapeutics (Industry)
            6. Sabine Blankenship, PhD, Science Liaison at German Consulate General in San Francisco (Science Policy)
            Moderator: Gabriela Monsalve

3:45PM   **Introduction to LinkedIn and UCSF Connect – NEW!**
            Presenter: Gabriela Monsalve

4:15PM   **Wrap-up and homework for next week**

Catalytic Course #3 Agenda

MIND Motivating INformed Decisions

Saturday 3: December 2nd, 2017 Location: Mission Hall, Room 1400

8:30AM **Check-in and Breakfast**

9:00AM **Informational Interviews, Part 2**
Presenters: Jennie Dorman and Bill Lindstaedt

10:15AM **Discussing Your Homework**
Presenter: Gabriela Monsalve

10:45AM **Break**

11:00AM **Discussing Your Career with Your PI – Data from MIND Alumni** –NEW!
Presenter: Stephen Filios

11:20AM **Roles in Academia that You Might Not Know About** –NEW!
Presenters: Bill Lindstaedt and Gabriela Monsalve

12:00PM **Lunch**
Gabi taking headshots outside in the courtyard

1:00PM **Preparing for Phase 2: Career Exploration in Peer Teams**
Presenters: Gabriela Monsalve and MIND Alumni
Panelists:
1. Tim Acker
2. Tarja Yvanka De Soysa
3. Steffen Biechele

2:00PM **Job Simulations – What They Are and How/When to Do Them** – NEW!
Presenter: Jennie Dorman

2:30PM **Break**

2:45PM **Visualizing your Career Story So Far – Poster Session**
Moderator: Jennie Dorman

4:15PM **Preview: How to Take the MBTI, Catalytic Course Evaluation, and the MIND Course Website**
Presenters: Gabriela Monsalve and Bill Lindstaedt

Community ground-rules set by this cohort on the first day

On the first day of this year's MIND program, participants were asked:

1. In your experience, what behaviors **contribute to a respectful atmosphere**, in person and online? Be specific and give examples.
2. In your experience, what behaviors tend to **damage the atmosphere of respect**, in person or online? Be specific and give examples.

Then, in a large group discussion, we assembled a list of these behaviors. Trainees were then asked to "vote" on the behaviors that were most important to them. They could vote for two behaviors that contribute to a respectful atmosphere and two that damage respect. The behaviors are listed below, rank ordered from those that garnered most votes to those that garnered the least.

Be present/engaged	29 votes
Listen	29
Don't dominate the conversation	28
Don't come to meetings unprepared	22
Acknowledge and accept other views	21
Be on time	14
Don't interrupt	14
Don't pass on confidential information	10
Don't be on the phone the whole time	9
Help others	7
Don't judge	6
Be honest	6
Ask clarifying questions	5
Don't ignore emails beyond 48 hrs	5
Don't tell people they are wrong	4
Read emails that are sent to you	3
Take pause before reacting	3
Don't dismiss others	3
Believe people	2
Greet others	1
Give options	1
Don't make over-generalizations	1
Don't fail to meet your commitments	1
Don't pester	1 vote

Information for Participants about Peer Teams

(Handout we give them during the Catalytic Course to prepare them for peer teams.)

Description of Peer Teams

In these groups of 6-7 peers, you'll be setting career exploration goals and holding one another accountable to those goals. The peers in your team will challenge and support you as you think through how to overcome obstacles, meet your deadlines, and find confidence in your career direction. In return, you will support and challenge your team members in the same way.

Goals of Peer Teams

1) To motivate you and hold you accountable for continuing to explore careers.
2) To connect you with peers from whom you can learn: *how* they are exploring careers, as well as *what* they are discovering about different careers.
3) To develop your interpersonal communication skills, since employers report these are critical.
4) To provide support through the challenges of undertaking career exploration during your graduate or postdoc experience.

Role of Facilitators

Each team will be assigned two facilitators who will attend your meetings. These facilitators are either alums of the MIND program, postdocs with facilitation or teaching experience, or UCSF staff who serve trainees. They are NOT career experts, but they help keep the meetings productive and efficient, by helping teams stay focused on problem-solving (not venting), establishing effective meeting structure and norms, and watching the time to make sure that everyone receives attention from the group. Between meetings, facilitators moderate any online discussion for your team, and help you find answers to your questions.

What will we do at our team meetings?

Imagine that your peer team meetings are like a lab meeting, but instead of describing progress made in your scientific research, you present the progress you've made with your career exploration. You will NOT be expected to present slides; instead, each member of the team will speak briefly about their own career exploration efforts over the past month. Just as you would in lab meeting, you will summarize what you've

learned and what you still need to know, tell us what your next goals are, and finally—make a "contract" with your teammates.

What's a contract?

A career exploration contract is a concrete and specific statement of what you will try to get done before your team meets next.

Contracts should state:
   (1) the career(s) you are investigating,
   (2) your career exploration goal(s), and
   (3) things you will do to achieve the goal(s).

Here are 3 examples of contracts:

Contract Example 1:

Career	Goal / Purpose	Ways of achieving goal (Tasks or activities)
Plan A: Science communication	Increase readership for my blog, which highlights recent research studies for the general public	1. Write two blog pieces 2. Post them on Facebook

Contract Example 2:

Career	Goal / Purpose	Ways of achieving goal (Tasks or activities)
Plan A: Data Science	Learn whether I would need additional training or experience to pursue this career path.	Identify someone whose primary expertise is in biology, like me, and ask them how much / what sort of computational experience they needed to demonstrate to break into this field? (Insight Fellowship? Just putting small projects on github account?)

Contract Example 3:

Career	Goal / Purpose	Ways of achieving goal (Tasks or activities)

Plan B: Science Education for Non-Scientists	Identify roles in science museums that I might find fulfilling.	Prepare for informational interview with my exhibit designer contact from the California Academy. Refine my list of questions, e.g.: • What background is required for becoming an exhibit developer? • I've read that most museum visitors only spend about 1 minute per exhibit. Does she find that limits what she can attempt to "teach" them in an exhibit? • Who might I speak with about other roles that might interest me, e.g. working with K-12 visitors?

In what sense are these "contracts"?

The statement of what you'll do before the next team meeting is a contract because your peer team members must agree that it sounds reasonable—that it is (1) likely to address your current goal or challenge and (2) feasible and do-able in 2-5 hours max. Your team members are, in effect, parties to the contract. If they think your contract is over-ambitious, they may suggest that you break it down into smaller steps. They will be curious to hear at the next peer team meeting whether you met your goal. We encourage you to check in with each other between meetings to see how it's going, to cheer each other on, or to give a friendly kick in the pants (especially if someone asks for one). Your teammates are invested in you reaching your goals and you, in turn, become invested in them reaching their goals.

Peer Team Meeting Frequency

Peer Teams are expected to meet for 2 hours every other week, in person. Teams will schedule the meetings themselves at a mutually convenient time.

Attendance

We expect you to make a great effort to attend these Peer Team meetings on time and in person. If travel commitments or health issues prevent you from attending a certain peer team meeting, you are expected to (1) notify your teammates and facilitator well in advance, (2) explore the possibility of skyping in to that team meeting, and (3) post your contract (see below) nonetheless.

Please note that in the month of March, participants are expected to attend our mid-year full-cohort meeting (3/3/18), as well as their regular peer team meetings.

Responsibilities

This phase of the MIND program entails responsibilities both to yourself and to your teammates:

Your responsibilities to your teammates:

1. To show up for team meetings so you can fulfill your peer-mentoring responsibilities.

2. To notify your teammates and your facilitators IN ADVANCE if you can not attend a certain meeting.

3. To believe in your teammates, and give specific positive feedback when you observe them doing something especially challenging or courageous.

4. To make sure that your comments to your teammates focus on THEIR needs, not just things you are keen to talk about.

5. To prod them gently when you see that they are stuck.

6. To keep what they say **confidential.**

Your responsibilities to yourself:

1. **We expect you to spend 5-10 hours per month outside of team meetings doing some form of active career exploration.** You need not have done an informational interview each month, but we do expect you to experiment monthly with both modes of career exploration, as discussed on Saturday 1 in the Introduction to Working Identity (see slide below). The first mode is internal, and includes thinking and exploring on your own (e.g., reading, reflective writing), but should also involve some *learning-by-doing* activities like conducting an informational interview, attending a professional mixer, or finding a small way to try the typical tasks in a career of interest to see how you like it.

2. To find ways to continue making progress on career exploration—however slowly, and even when you get busy, your research takes off, or life presents some unforeseen challenges.

3. To go easy on yourself – most people find career exploration challenging at times.

4. To believe in yourself: you are creative, bright, and persistent. You can do this!

EFFECTIVE CAREER EXPLORATION... MIND

1. REQUIRES 2 MODES
2. IS ITERATIVE
3. TAKES TIME

Making sense

Internal mode:
Read
Reflect

Shifting connections

External mode:
Meet people
Try work

Revising your story

Crafting experiments

Inspired by Ibarra, *Working Identity,* 2003
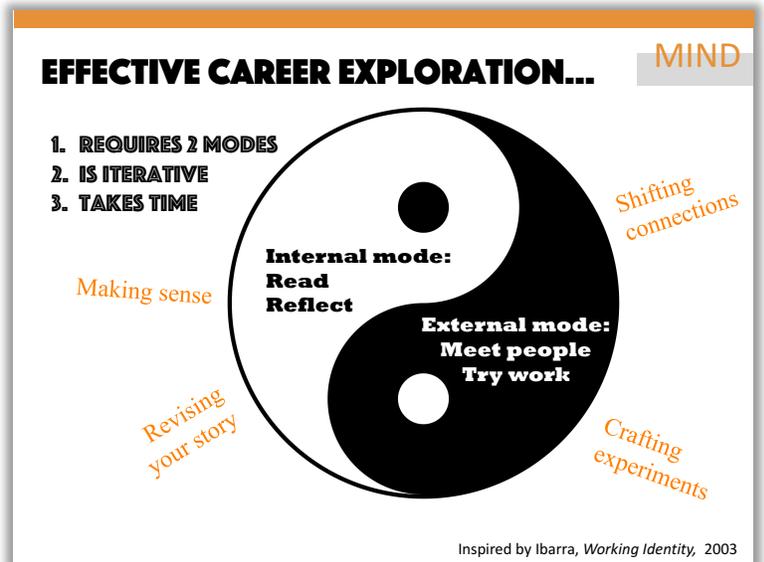
Instructions for MIND participants: "How to Responsibly Leave your Peer Team"

Every year, a small number of participants leave their peer teams due to extenuating circumstances: to care for a family member, to deal with serious health challenges themselves, or to take a new job. The MIND Program realizes that the decision leave a peer team is not easy.

The MIND Program supports the choices you need to make to ensure your well-being, and we must also **ensure the success of the remaining members of your peer team**. We've found that when a peer team member disappears without communicating with their peer teammates, team morale suffers. Conversely, members who fully communicate with their team *before* their departure leave little negative impact on the remaining team members. We ask your cooperation to leave in a responsible manner, as outlined below.

If you must leave your peer team before June 2018, please use the following protocol to ensure that you remain in good standing with the MIND Program:

1. Send an email to MIND@ucsf.edu stating your decision to leave your peer team. In your email, please include:

    a. When you plan to leave the team;

    b. A non-UCSF email address that we can use to keep in touch with you, and;

    c. Why you have chosen to leave (this email will be kept confidential among the MIND staff and will not be shared with your peer team).

2. Schedule a brief exit interview with the MIND Program Director or, if you prefer, another available MIND staff member. The exit interview can be conducted by phone and has the following goals:

    a. To get a better understanding of your situation.

    b. To collect your feedback on what works and doesn't work in the peer team process.

    c. To help you plan what to say when you notify your peer team that you are leaving.

3. Notify your peer facilitators in person/email/ or phone that you are planning to leave the team, using language you developed in item #2c.

4. Notify the entire peer team that you are leaving, using the language you developed in item #2c.

5. Continue to respond faithfully and honestly to MIND and NIH survey requests (remember, you are a member of a research study, and are an essential member of our experimental group!)   Thank you!

Informational Interview Report Assignment

Overview: Synthesize what you learned from one or more of your informational interviews in a brief write-up which you will post to the course website in the appropriate career discussion forum (e.g., Careers in Industry, Careers in Policy, Careers in Science Communication, etc). The purpose of these write-ups is to help other students and postdocs learn about the career paths you explore.

Deadline: March 15 at 5:00pm PST, but we recommend writing (and posting) your summary soon after you do the informational interview, while it's fresh.

Please address the following questions:

1. What is the current career field of the person you interviewed? (e.g. bench scientist in industry, patent litigator, PI at liberal arts college, etc.)

2. Does this job require a PhD?

3. Is a postdoc: (a) required for this career, (b) not required but advantageous, or (c) irrelevant?

4. Did the person you interviewed suggest any ways that students/PDs can get "transitional experience"? By "transitional experience" we mean the kinds of experiences that help you get a feel for this career path. Here we seeking suggestions of activities that don't take as much time as a full- time internship, since that often is not feasible for research trainees. These might include things like: attending a local meeting of a professional society or interest group, or reading a certain trade publication or website, etc.

5. What are 2-3 other things you learned about the job or career you just explored? **Note especially things that surprised you or that challenged -- or confirmed-- preconceptions you had about the career.** Again, imagine the audience is a fellow biomedical research trainee who is interested in exploring this same career path.

Expected length: 1 page is a good target (slightly more or less is fine too). See the examples below.

Format: Please paste your write-up on the course website as a direct post (*not an attachment*), as it will be easier for everyone to read on their devices that way.

Two example reports follow.

Example Informational Interview Report #1

Interviewee: Business Technology Analyst at Deloitte (specialized in the field of IT Systems Integration).

Interviewee Career Path: after graduation- 2 years of experience in software development.

Requirements: people having a PhD can apply to three divisions within Deloitte (good GPA is a requirement for all three):

• Human Capital (interviewee considers this to be the best bet for somebody with a PhD, but this may have to be confirmed);

• Technology (mostly centered around IT, thus strong background in software engineering is required);

• Strategy and Operations (MBA seems to be a strict requirement, but this may have to be confirmed).

Job Postings: the website of the company. The advice of the interviewee was to simply apply to job postings and go through the recruitment process.

Transitional Experiences: The interviewee had experience in software development before joining the firm. Extensive preparation for the interview is required, since the case study part of the interview was much more difficult than the typical training cases found online. The format of the interview was 3 interviews of 45 min each (during one day): 1) fit with company's culture, 2) technical skills, 3) case study.

Preconceptions confirmed:

Work culture at Deloitte is based on the same principles as in most other management consulting firms: employees wait to be selected for individual projects, the mentality is "up or out", a lot of training is provided, teamwork skills are of paramount importance.

Preconceptions challenged:

• Preconception 1: All employees hired by the company are involved in projects almost continuously. In reality, for some people it is very difficult to get on a project: there are examples of people working for the company but not involved in any project for half a year or more. There are official applications and interviews for the employees for each specific project. The strategy for getting on a project is, among other things, networking within the company + a unique skillset + serendipity.

- Preconception 2: Employees are extremely busy working on their projects and do not have time for much else. In reality, in addition to being expected to work for about 60 hours per week, significant additional efforts are required for people to grow within the company. These efforts should be targeted at initiatives meant to help the company grow.

- Preconception 3: There will be no job offer without extensive networking with people within the company ahead of time. The interviewee was hired without any connections in the company.

Other Notable Information:

- There is a division of the company that works exclusively for the US government: Deloitte Federal, with 6 000 employees out of 120 000 total.

- Consulting for the government is very different from consulting for private firms. Main areas of strength for Deloitte seem to be taxes and auditing. The teams are normally relatively big: about 15 people. Business Technology Analysts do not communicate with clients directly.

- Very strong emphasis is on company culture: a new employee need to absorb this culture quickly and actively promote it. The opinion of the interviewee is that Deloitte is not particularly interested in candidates holding a PhD and will hire such person only if there is a specific need for the company in that person's skillset.

Example Informational Interview Report #2:

1. *What is the career path of the person you interviewed?*

The person I interviewed went into industry after doing a postdoc. She spent a few years as a group leader before coming back to academia as a **PI at UCSF/Gladstone**.

2. *Does this job require a PhD?* Yes.

3. *Does it require a postdoc?* Yes.

4. *Did the person you interviewed suggest any ways that students/PDs can get "transitional experience"?*

She said that the two skills she sees as really setting the PI job apart from any others are writing grants and writing papers. Her suggestion was to write, edit, and discuss these things with others to start getting experience and to seek out mentors to help with writing processes and strategies. Her opinion was that if you find you really don't like writing grants or papers you probably wouldn't want to be a PI, but that the other skills you learn during our PhD would be useful in any career path.

She also suggested getting more teaching experience to understand the kind of institution in which you may want to be a PI and what role you would want formal teaching to play in your career.

5. *What are 2-3 other things you learned about the job or career you just explored? Note especially things that surprised you or that challenged -- or confirmed-- preconceptions you had about the career. Again, imagine the audience is a fellow biomedical research trainee who is interested in exploring this same career path.*

I was surprised by how optimistic she was by the prospect of someone in my position pursuing a career as a PI. It seems like throughout grad school I've heard so much about how PhDs take longer and longer, postdocs last forever, and grants are impossible to get, so it was really heartening to hear something that runs counter to that narrative. Her view was that there are a lot of institutions at which you can have a lab and even if you don't end up at a top tier institution with lots of resources as long as you're doing good science you care about you'll be ok.

My interviewee's time in industry seemed to confirm my earlier impressions of it. She said she really enjoyed how quickly things moved but didn't like that she didn't have control over what she and her group studied. She said that once they got a certain result, they would be put on a new project. She found that she really preferred the academic model, where all of her work would make cumulative progress towards answering one question.