Managing Your Relationship With Your Research Mentor

Naledi Saul

UCSF Office of Career & Professional Development
Student Academic Affairs

Our UCSF Community

3,198 Students, 1,111 postdocs = 4,309

Our Goal

Every single student and postdoc at UCSF has the knowledge, skills and confidence to navigate your career successfully.

Our 2 Minute Ask

1. Try anything you learned today
2. Micro-mentor! Share something you learned with someone else who needs it
3. Share the slides
4. Give a person an OCPD card
5. Put up an OCPD flyer (or take one down)
6. Post on social media & tag us UCSFOCPD 📷 f 🐦
7. Give us feedback
8. Come back….and bring a friend
9. Greet each other on campus
10. Do your thing

You are a part of a better culture in science

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Why is it so hard for me to manage this relationship with my Research Mentor?

Because there isn't one body of knowledge that perfectly encompasses all that biomedical students and postdocs can need to know to manage this complex and important relationship. **In fact, what you need to know spans pieces of 5 different areas of knowledge.** **This is what we're covering today.**

Relationships

Negotiation

Biomedical Environment

+ "in the US"

Role Conflict for Research Mentors

Power Dynamics & Differentials

Sources of Power

John   Bertram FRENCH & RAVEN
Referent (reputation)
Legitimate
Expert
Reward
Coercive
Informational

Hey, this is our work, and our paper just got accepted by JMBE (w/ revisions!)

Clement, Leung, Lewis, Saul

What will you learn today?

- Managing professional relationships is a dynamic landscape.

- My benchmark for today is to introduce you to key concepts of what it means to manage professional relationships, get you to the point that you can assess, frame and articulate any your issue, and give you ideas around best practices and resources that can help you to skillfully address the situation

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| Your core strategy | Assessing your relationship with your research mentor | Four overarching strategies in managing up | Q&A |

What will you learn today?

| Your core strategy | Assessing your relationship with your research mentor | Four overarching strategies in managing up | Q&A |

Your Professional Identity: How do you want to show up in your professional relationships?
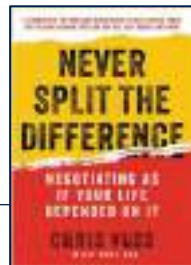
What are 1-2 core values or qualities for you?

Your answer to this question is the basis of your core strategy. A central facet of your professional identity, it is a touchstone in which you will ground yourself every time you engage your research mentor

Your core strategy

2/15/20

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Your Professional Identity: How do you want to show up in your professional relationships?

What are 1-2 core values or qualities for you?

- Accountable
- Adaptability
- Ambitious
- Assertive
- Authentic
- Balanced
- Candor
- Composed
- Compassionate
- **Curious**
- Engaged
- Ethical
- Excellence
- Fair
- Fearless

- Honest
- Humility
- Innovative
- Kind
- Logical
- Open Minded
- Optimistic
- Patient
- Proactive
- Pragmatic
- Rational
- Reliable
- Resourceful
- Resilient

- Respectful
- Responsible
- Savvy
- Self-confident
- Self control
- Serenity
- Stewardship
- Tenacious
- Thoughtful
- Transparent
- Trustworthy
- Unflappable

NEVER SPLIT THE DIFFERENCE

NEGOTIATING AS IF YOUR LIFE DEPENDED ON IT

CHRIS VOSS

Why this matters

- Your core values (what you believe) and qualities/traits (how you behave) help ground you in challenging relationships and in difficult situations.

- You may lose an argument, but it's important not to lose yourself. Challenging relationships tend to stress people out, and when a person isn't grounded, they tend to up overwhelmed and behaving in ways they regret later.

- Being grounded lets you engage with integrity – that is, make decisions, communicate, handle change and manage conflict from a place of your own values. It's key to professional wellbeing.

  In difficult moments, it helps you figure out what to do and say and do and say it from a place that feels true to you. (e.g.: "HONESTLY, *it's hard for me to concentrate on what you're saying while you're yelling at me*. Please stop.")

- Awareness is also important so you don't let someone use your values against you. (e.g.: you want to be FAIR, don't you?)

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What will you learn today?

You know yourself

| Your core strategy | Assessing your relationship with your research mentor | Four overarching strategies in managing up | Q&A |

What are some complicating factors in your relationship with your research mentor?

Mentoring Role

Supervisory Role

Research Mentor

Educator Role

This is a relationship that will always need to be tended to, to maintain clarity,

Role conflict.

- PIs are asked to mentor, to teach and to supervise students and postdocs.

- These 3 roles have different goals, responsibilities and expectations.

- Furthermore, PIs haven't always received training and support in how to execute these individual roles effectively and inclusively.

- Moreover, these roles are at times in conflict with one another.

- So, there are barriers preventing PIs from being clear, transparent and consistent.

- Leaders who are not clear, transparent, and consistent can negatively impact employee (and student) productivity, motivation, retention, mental well being, sense of belonging, trust levels and psychological safety.

What factors influence our ability to do our best work?

Frederic Herzberg Theory of Motivation (1968)

Abraham Maslow's Hierarchy of Needs (1943)

Learn & grow in the job. Use one's skills in challenging and interesting work

Achieving one's potential, being creative, serving a cause, contributing to society

Self Actualization

Self-Control, recognition (autonomy)

Prestige, self-respect, competence, self confidence, sense of self work

Self Esteem

Internal, Higher Order Needs

Advancement
Supervisor-supervises
Relatives-associates

Friends, affiliation, affection, relationships, love

Belonging

Work environment
Company policies

Both physical (security, shelter, protection, law and order, health insurance, plans, secure job) and psychological (freedom from fear an anxiety)

Safety

External, Lower Order Needs

Job security
Salary/benefits

Physiological

Basic survival needs such as feed and water

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Let's play a role conflict game!
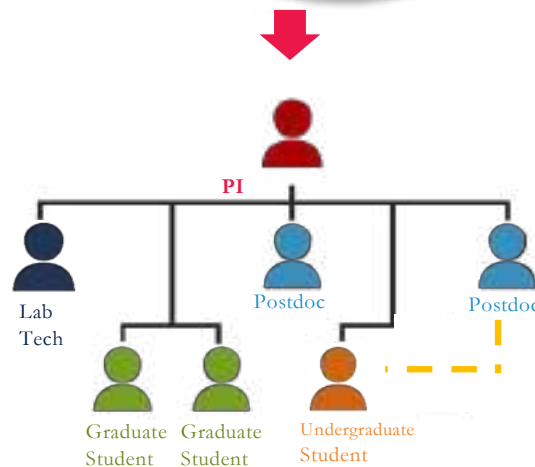# Is my research mentor a supervisor?

Yes. But they aren't a traditional supervisor either.

Research mentors have a harder job than traditional supervisors. They have a level of mentoring and educational responsibilities that traditional supervisors don't, like a responsibility to provide training (#2) and provide support (#7) to help get you to your next goal/position with another organization. (Traditional *supervisors are only obligated to train you for your current job*)

It's more accurate to say that your PI has "mentoring, educational and supervisory responsibilities in their role as a research mentor."

THE TAKE AWAY?

What important is that this important relationship has complicating factors which need to be proactively managed.

1 Does your research mentor have the legitimate authority to execute or assign ALL these supervisory responsibilities (in the lab)?

2 Does your research mentor's own productivity depend in part on your productivity?

PI

Lab Tech

Postdoc

Postdoc

Graduate Student

Graduate Student

Undergraduate Student

7 Supervisory Responsibilities

1 Set expectations/ Take baseline assessment

2 Teach, train & delegate effectively

3 Give kudos and corrective feedback continuously

4 Recognize progress & reward achievement

5 Articulate & enforce consequences

6 Manage conflict

7 Provide support

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A PI has 3 roles. Why assess the functionality of your relationship with your research mentor through a supervisory lens?

Types of comments from the *Chronicle of Higher Education* forum →

Because many of the conflicts between students/postdocs and their research mentors are supervisory ones, rather than mentoring or educational ones, e.g.:

1. "I'm not clear on my research mentor's expectations."(#1)
2. "When I meet with my PI, their feedback is vague." (#3)
3. "My PI and I disagree about authorship" (#4, #6)
4. "I'm drowning and PI isn't supporting me." (#7)

7 Supervisory Responsibilities

1. Set expectations/ Take baseline assessment
2. Teach, train & delegate effectively
3. Give kudos and corrective feedback continuously
4. Recognize progress & reward achievement
5. Articulate & enforce consequences
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7. Provide support

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20+1 Questions to Manage Your Relationship: Assessing Your Research Mentor's Supervisory Ability and the Functionality of Your Relationship

Effective supervision has been positively correlated with productivity and high morale. Since part of your research mentor's role includes supervisory responsibilities, one way to evaluate the 'health' of your relationship with your research mentor is to assess your relationship every 3-6 months through the lens of their supervisory role. Supervisors are focused on productivity, and other hiring/firing they have seven main responsibilities, listed below. If you rate less than a 7 in any area, it can help to reach out to other mentors or support for perspective and guidance. They can help you develop strategies to proactively fill in the gaps in your training or address issues in your relationship and achieve your goals.

Responsibilities			Criteria	Disagree		Agree
1	Set Expectations	1	I can articulate my mentor's **performance/productivity expectations** for me (*What you should do, e.g.: work hours, key milestones on a project; if there are any timelines regarding training, etc.*)	1 2 ③	4 5 6 7	8 9 10
		2	I can describe my mentor's **conduct/behavioral expectations** for me **in the lab** (*How you should act, e.g.: how you should address people in the lab; how you should communicate, etc.*)	1 2 3	④ 5 6 7	8 9 10
		3	I can describe my mentor's expectations for me **when we interact/communicate** (*e.g.: How you should prepare for/behave in 1:1 meeting; how frequently you communicate; how they want you to communicate bad news, etc.*)	1 2 3	4 5 ⑥ 7	8 9 10
		4	My mentor's conduct/behavior towards me is appropriate/professional	1 2 3	4 5 6 ⑦	8 9 10
2	Teach/Train and Delegate	5	I can describe my mentor's teaching/training approach	1 2 3	4 ⑤ 6 7	8 9 10
		6	My mentor's approach to teaching/training is effective with the way I learn	1 2 ③	4 5 6 7	8 9 10
		7	My mentor clearly delegates tasks and projects to me	1 2 3	4 5 6 ⑦	8 9 10
3	Give Kudos and Corrective Feedback	8	My mentor regularly gives me **kudos** feedback (*e.g.: You did X correctly/well. Well done! Keep doing X this way because…*)	1 2 ③	4 5 6 7	8 9 10
		9	My mentor regularly gives me **corrective** feedback (*e.g.: Please stop doing X this way. Do X this other way instead. Here's why this is important…*)	1 2 3	4 5 ⑥ 7	8 9 10
4	Recognize Progress and Reward Achievement	10	My mentor acknowledges my progress towards stated goals (*e.g.: with private or public recognition, etc.*)	1 2 3	4 5 ⑥ 7	8 9 10
		11	My mentor has rewarded me when I excel (*e.g.: nominated you for awards, access to new opportunities or resources, etc.*)	1 2 3	4 5 ⑥ 7	8 9 10
5	Articulate and Enforce Consequences	12	My mentor has articulated clear consequences to me if I do not meet **performance/productivity expectations**	1 ② 3	4 5 6 7	8 9 10
		13	My mentor has articulated clear consequences to me if I do not meet **behavioral/conduct expectations**	① 2 3	4 5 6 7	8 9 10
		14	My mentor fairly enforces poor performance and behavioral/conduct consequences **with me**	1 2 3	4 5 6 ⑦	8 9 10
		15	My mentor fairly enforces poor performance and behavioral/conduct consequences **with others in the lab**	1 ② 3	4 5 6 7	8 9 10
6	Manage Conflict	16	My mentor has demonstrated an ability to effectively manage **conflict in the lab**	1 2 ③	4 5 6 7	8 9 10
		17	My mentor has demonstrated an ability to effectively manage **conflict between us**	1 ② 3	4 5 6 7	8 9 10
7	Provide Support	18	My mentor has offered me support when I face challenges	1 2 3	4 5 6 7	⑧ 9 10
		19	My mentor actively supports my **training goals**	1 2 3	4 ⑤ 6 7	8 9 10
		20	My mentor clearly supports my **career goals**	1 2 3	4 5 ⑥ 7	8 9 10
		21	I feel good about my relationship with my mentor	1 2 3	4 5 ⑥ 7	8 9 10

- Provides a more comprehensive view of your relationship

- Comprehensive metrics can help overcome the "everything to be fine"/"everything is awful" extremes

- Consider these 7 responsibility facets "Lead Indicators"

- Gives insight to where you should focus your energy and effort on strengthening understanding and your relationship

- Lower rated facets could be a sign that something needs to be addressed or managed

- Higher rated facets – something to appreciate!

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Assess & Share
(what you're comfortable with)

If you are concerned about

- Harassment (sexual, etc.)

- Discrimination

- Bullying

OCPD is committed to your safety and your autonomy.

So we want you to know that these are three areas where the UCSF community (including OCPD staff) are mandated reporters.

If you do not wish to report, we encourage you to first reach out to one of two on-campus confidential resources: the Office of the Ombuds and/or the Care Advocate or off campus resources (such as a trusted mentor) to support you in navigating your situation.

Have questions? Use our anonymous ask.

What will you learn today?

You know yourself

You've narrowed down on key issues

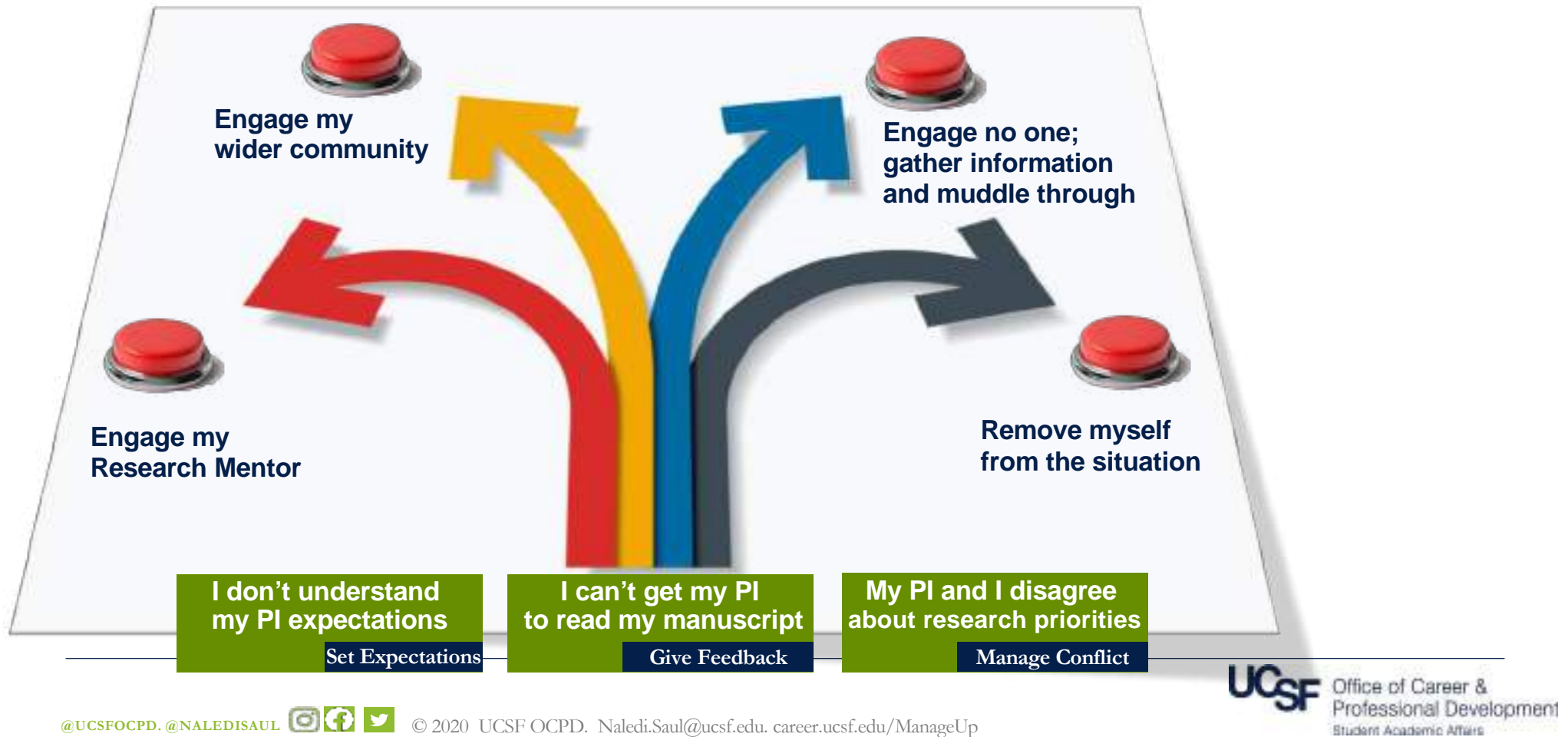| Your Core Strategy | Assessing your relationship with your research mentor | Four overarching strategies in managing up | Q&A |

Managing Your Relationship With Your Research Mentor

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Let's put some parameters around what it means to manage professional relationships. No matter what the issue, there really are only four options

Engage my wider community

Engage no one; gather information and muddle through

Engage my Research Mentor

Remove myself from the situation

I don't understand my PI expectations

Set Expectations

I can't get my PI to read my manuscript

Give Feedback

My PI and I disagree about research priorities

Manage Conflict

The question is how. How do students and postdocs engage each of these options skillfully?

3

Engage my wider community

Engage no one; gather information and muddle through

2

Engage my Research Mentor

Remove myself from the situation

1

I don't understand my PI expectations

Set Expectations

I can't get my PI to read my manuscript

Give Feedback

My PI and I disagree about research priorities

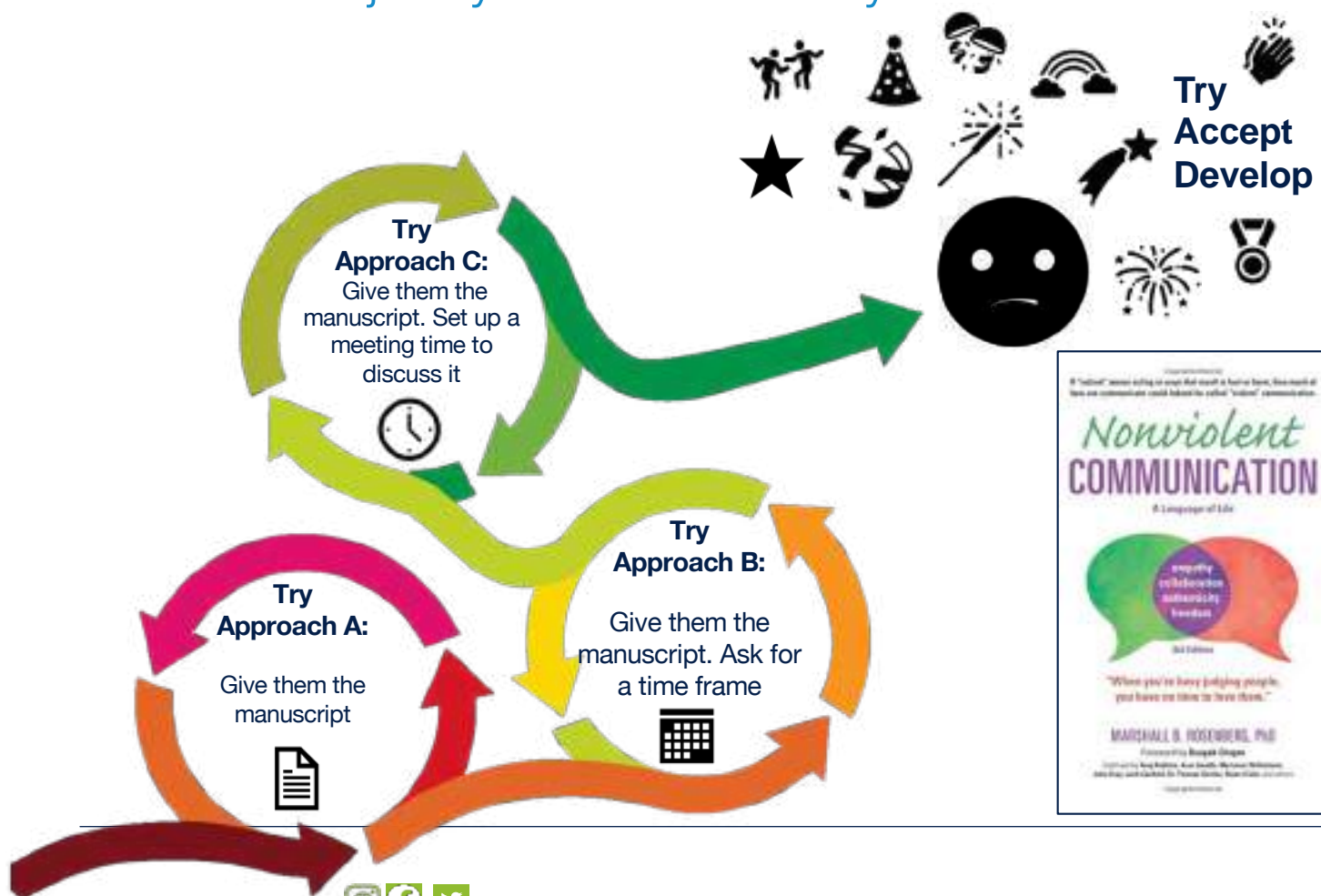**Manage Conflict**

The Ability To...

1 Assess and define your issue

2 Understand your overall strategic options

3 Engage skillfully

Is Managing Your Relationship With Your Research Mentor

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Let's do a deeper dive.
First up: Engaging your Research Mentor

Engage my
Research Mentor

The Ability To…

1 Assess and define your issue

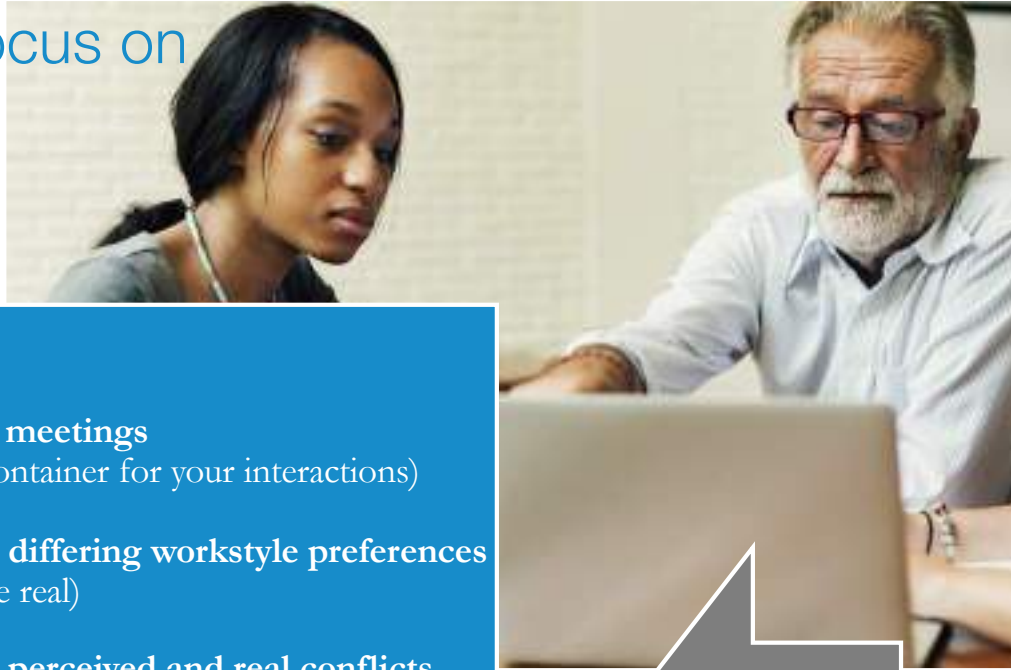**2** Understand your overall strategic options

3 Engage skillfully

Is Managing Your Relationship With Your Research Mentor

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Your professional relationship with your Research Mentor is like just your research: dynamic and iterative

Try Approach C: Give them the manuscript. Set up a meeting time to discuss it

Try Approach A: Give them the manuscript

Try Approach B: Give them the manuscript. Ask for a time frame

Try Accept Develop

Nonviolent **COMMUNICATION**

A Language of Life

empathy collaboration authenticity freedom

3rd Edition

"When you're busy judging people, you have no time to love them."

MARSHALL B. ROSENBERG, PhD

- ...And it may take awhile to pin down what's not working for you.

- And it's okay to not know. But you keep refining your ask as long as you reasonably can, at which time you might find another way to move forward.

- Structure and curiosity helps.

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Three things to focus on

1. 101: Get a handle on your meetings
   (These are the focused container for your interactions)

2. 201: Get a handle on your differing workstyle preferences
   (Believe them. They are real)

3. 301: Get a handle on your perceived and real conflicts
   (Is there progress? Is there room to negotiate?)

- …And it may take awhile to pin down what's not working for you.

- And it's okay to not know. But you keep refining your ask as long as you reasonably can, at which time you might find another way to move forward.

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Engage 101: Get a handle on your meetings

1. **101: Get a handle on your meetings**
   (These are the focused container for your interactions)

2. **201: Get a handle on your differing workstyle preferences**
   (Believe them. They are real)

3. **301: Get a handle on your perceived and real conflicts**
   (Is there progress? Is there room to negotiate?)

Meetings are the lynchpin of progress. They can prompt deadlines, and opportunities for discussion and clarification

The person who controls the agenda controls the meeting.

So let's create an agenda.

This is a place where you have power. Your metrics aren't frequency of meeting – it's structure, purpose and value

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Engage 101: Get a handle on your meetings

1. **Keep and share a running agenda**
   Use Box or Google doc to create ongoing bullet point agenda. You can structure your meetings and have a transparent record of your conversations and agreements. Link the email in the outlook meeting invite so they can review it.

2. **"Present your 'to do' list."***
   "Talk though your future work plan with your supervisor. Make them aware of any equipment breakdowns or consumable supply issues that may affect your work progressing. Also bring up work you wish to stop doing or spend less time on to focus on more pressing matter." *

3. **"Bring your data to the meeting in a well-presented format."***
   "Have your data in a format that will work well with your supervisor. Printouts can work well for taking notes. Make sure you have carried out any appropriate statistical or other analysis. If you have repeated an experiment a number of times, your supervisor will want to know if the result is significant or not. Turing up at a meeting without such basic and critical information gives your boss a bad impression and makes your work appear sloppy."*

4. **"Put things in writing."***
   "If your boss is a bit scary or you have had communication issues in the past, follow up your meeting with an email. Set out the work plan you and your PI agreed on and the timeframes involved. This will show your PI that you had a clear understanding of what was discussed in the meeting."*

5. **You have a notebook for your work? You should keep a notebook for your work relationships**
   Keep your own notebook about your meetings. What is your PI focused on? What seem to be their priorities? What seem to be their priorities for you? What are your impressions of the functionality of your relationship?

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Sample Language & Structure: student edition

When engaging a supervisor, your open should meet 3 criteria:

1. Be clear and concise.

2. Demonstrate that you are taking responsibility for your responsibilities and interests (goals, needs and concerns).

3. Signal that you value their interests (goals, needs and concerns). *(this is sometimes criteria #2)*

Agenda 2.23.20

1. Progress on X project
2. Mentoring new undergraduate student
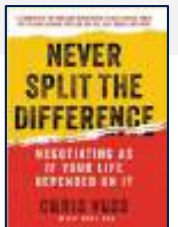3. Discussion of Carver, Jemison papers

4. Summer course funding

Tess V: Use the agenda to bring up uncomfortable topics!*

- Thanks for taking the time to meet. This week, my two agenda items are to update you on my progress and discuss some career development opportunities. Is there anything else you think we should cover?

- To start, In the last week I moved forward on 3 things.
  - First. I analyzed X data and got some interesting results,
  - Second, I began orienting Ursula (the undergraduate student) and,
  - Third, I read up on Y and Z articles that you gave me.
  Unless you think differently, let me start with the data…..

- …(I know my last item was the Carver and Jemison papers, but I see we have 15 minutes left and I want to make sure we discuss career development. Can we move those to our next 1:1 and discuss this instead? …thanks/ok).

- So, career development. My current thinking is the following: I am still interested in an academic career, yet I realize I want to explore career options for PhDs. There is a peer career exploration program, supported by the Grad. Division called MIND, and I would like to apply for next spring's cohort.

- My goal today is to begin to discuss if there is a way to participate in the program and still meet the goal of potentially contributing my data to X paper, and achieve authorship.

If you're engaging someone with an aggressive engagement style, someone with a strong desire for control, or someone you're not sure is 'on the bus' with you, demonstrating deference and communicating with frequent 'decision points' can help.

If that doesn't work, focus on brevity.

NEVER SPLIT THE DIFFERENCE

CAS: CAREER EXPLOR.

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Sample Language & Structure: student edition: fold issue into agenda option

When engaging a supervisor, your open should meet 3 criteria:

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▪ Thanks for taking the time to meet. This week, my two agenda items are to update you on my progress and discuss some career development opportunities. Is there anything else you think we should cover?

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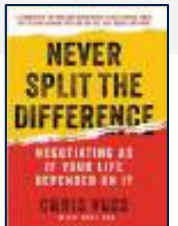- Third, I read up on Y and Z articles that you gave me.

What would you like to start with?

Like this

If you're engaging someone with an aggressive engagement style, someone with a strong desire for control, or someone you're not sure is 'on the bus' with you, demonstrating deference and communicating with frequent 'decision points' can help.

If that doesn't work, focus on brevity.

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1. Progress on X project
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3. Discussion of Carver, Jemison papers

4. Summer course funding

Tess V: Use the agenda to bring up uncomfortable topics!*

CAS: CAREER EXPLOR.

UCSF Office of Career & Professional Development Student Academic Affairs

Sample Language & Structure: Postdoc edition: single topic option

When engaging a supervisor, your open should meet 3 criteria:

1. Be clear and concise.

2. Demonstrate that you are taking responsibility for your responsibilities and interests (goals, needs and concerns).

3. Signal that you value their interests (goals, needs and concerns). *(this is sometimes criteria #2)*

Agenda 2.23.20

1. Career Conversation

Tess V: Use the agenda to bring up uncomfortable topics!*

- Thank you for squeezing in a zoom meeting while you're at your conference. My single agenda item today is to talk with you about my thinking regarding my career goals.

- I've been using UCSF's Academic Career Readiness Assessment (ACRA) using it to evaluate my own competitiveness and have some ideas I would like to discuss with you.

- It may interest you to know, ACRA was pioneered at UCSF. It's a rubric designed to help trainees assess and improve their competitiveness for faculty positions. It categorizes the types and level of productivity that were essential to being selected as a faculty candidate, according to the biomedical faculty who sat on tenure track faculty hiring committees.

- Based on ACRA, two weaknesses in my candidacy are around articulating a research vision and strategy that is innovative and viable at R/T institutions, and a lack of demonstrated teaching experience. I want to tackle research issue first.

- I know that I will need to hammer out my projects related to X grant. I will do that. But I've also generated four potential ideas that build on my research interests in Y, that could be implemented at both a PUI and R/T institutions.

- So I'm asking for two things – 1. can we find time for me to pitch my ideas to you, and 2. I don't suppose we could find an hour next week to review the draft of my ACRA plan and help me determine which activities would best position me?

INDY: INDEPENDENCE

Public Service Announcement

Pursuing an academic career path? Having trouble prompting or facing disagreements with your PI about what you should focus on during your training? We've got you!

Use ACRA to help prompt expectation conversations and/or build your training plan

Find Dr. Clement's evidence based

Academic Career Readiness Assessment (ACRA) tool here:

career.ucsf.edu/ACRA

UCSF Office of Career & Professional Development
Student Academic Affairs

Sample Language & Structure: Postdoc edition: single topic option

When engaging a supervisor, your open should meet 3 criteria:

1. Be clear and concise.

2. Demonstrate that you are taking responsibility for your responsibilities and interests (goals, needs and concerns).

3. Signal that you value their interests (goals, needs and concerns). *(this is sometimes criteria #2)*

Agenda 2.23.20

1. Career Conversation

- Thank you for squeezing in a zoom meeting while you're at your conference. My single agenda item today is to talk with you about my thinking regarding my career goals.

- Two weaknesses I've identified in my candidacy are around articulating a research vision and strategy that is innovative and viable at R/T institutions, and a lack of demonstrated teaching experience.

- I know that I will need to hammer out my projects related to X grant. I will do that. I've also generated four potential ideas that build on my research interests in Y, that could be implemented at both a PUI and R/T institutions.

- So I'm asking for two things – 1. can we find time for me to pitch them to you and talk about other things I might do?
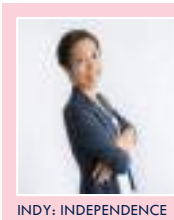
Not Chatty PI

If you're engaging someone with an aggressive engagement style, someone with a strong desire for control, or someone you're not sure is 'on the bus' with you, or someone who doesn't like surprises or 'feeling cornered' demonstrating deference and communicating with frequent 'decision points' can help.

If that doesn't work, focus on brevity.

Chatty PI

- Thank you for squeezing in a zoom meeting while you're at your conference. My single agenda item today is to talk with you about my thinking regarding my career goals.

- I've been using UCSF's Academic Career Readiness Assessment (ACRA) using it to evaluate my own competitiveness and have some ideas I would like to discuss with you.

- It may interest you to know, ACRA was pioneered at UCSF. It's a rubric designed to help trainees assess and improve their competitiveness for faculty positions. It categorizes the types and level of productivity that were essential to being selected as a faculty candidate, according to the biomedical faculty who sat on tenure track faculty hiring committees.

- Based on ACRA, two weaknesses in my candidacy are around articulating a research vision and strategy that is innovative and viable at R/T institutions, and a lack of demonstrated teaching experience. I want to tackle research issue first.

- I know that I will need to hammer out my projects related to X grant. I will do that. But I've also generated four potential ideas that build on my research interests in Y, that could be implemented at both a PUI and R/T institutions.

- So I'm asking for two things – 1. can we find time for me to pitch my ideas to you, and 2. I don't suppose we could find an hour next week to review the draft of my ACRA plan and help me determine which activities would osition me?

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Pair up!: What is your goal? How will you structure your time? What will you say?

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3. Signal that you value their interests (goals, needs and concerns). *(this is sometimes criteria #2)*

Agenda 2.23.20

1. Progress on X project
2. Mentoring new undergraduate student
3. Discussion of Carver, Jemison papers

4. Summer course funding

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If that doesn't work, focus on brevity.

- Thanks for taking the time to meet. This week, my two agenda items are to update you on my progress and discuss some career development opportunities. Is there anything else you think we should cover?

- To start, In the last week I moved forward on 3 things.
  - First. I analyzed X data and got some interesting results,
  - Second, I began orienting Ursula (the undergraduate student) and,
  - Third, I read up on Y and Z articles that you gave me. Unless you think differently, let me start with the data…..

- …*(I know my last item was the Carver and Jemison papers, but I see we have 15 minutes left and I want to make sure we discuss career development. Can we move those to our next 1:1 and discuss this instead? …thanks/ok).*

- So, career development. My current thinking is the following: I am still interested in an academic career, yet I realize I want to explore career options for PhDs. There is a peer career exploration program, supported by the Grad. Division called MIND, and I would like to apply for next spring's cohort.

- My goal today is to begin to discuss if there is a way to participate in the program and still meet the goal of potentially contributing my data to X paper, and achieve authorship.

INDY: INDEPENDENCE

CAS: CAREER EXPLOR.

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Engaging: Get a handle on 3 things

1. **101: Get a handle on your meetings**
   (These are the focused container for your interactions)

2. **201: Get a handle on your differing workstyle preferences**
   (Believe them. They are real)

3. **301: Get a handle on your perceived and real conflicts**
   (Is there progress? Is there room to negotiate?)

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RESPONSIBILITIES

job responsibilities are

what

your research mentor is obliged to do in their role as a PI

(the 7 supervisory responsibilities)

VS.

WORK STYLES

work style preferences are

how

your research mentor prefers to

(and would prefer everyone else)

get things done

7 Supervisory Responsibilities

1. Set expectations/ Take baseline assessment
2. Teach, train & delegate effectively
3. Give kudos and corrective feedback continuously
4. Recognize progress & reward achievement
5. Articulate & enforce consequences
6. Manage conflict
7. Provide support

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When your PI is not doing their job vs. you wish they would do their job differently

- When you don't see/can't meet with your PI for 8 weeks – they may not be doing their job: fulfilling responsibility #3: giving you feedback.
- When you wish they'd do it differently (e.g., they come by your bench at irregular times without notice and give you feedback in the moment, when you wish you could just schedule a standing meeting with them because it would give you time to prepare? That's a Work Style issue, and can be just as difficult in a different way.

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Engage 201: Get a handle on their workstyle preferences

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

Workstyle preferences

& Unenforceable rules.

How does your research mentor best understand and appreciate work, progress and problems?

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Engage 201: Get a handle on their workstyle preferences

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions
		Internal Processor or External Processor	
		Systematic or ~~Organic~~ Richly Associative	

How does your PI think and communicate?

How does your research mentor best understand and appreciate work, progress and problems?

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Assess your research mentor's workstyle preference: how do they think & communicate?

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

Internal Processor

Let me think about that and organize my thoughts

External Processor

The truth will emerge and reveal itself as I speak

7 Supervisory Responsibilities

1. Set expectations/ Take baseline assessment
2. Teach, train & delegate effectively
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Examples of perceptions you will need to manage regarding your Research Mentor's work style and perspective

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

Internal Processor

Let me think about that and organize my thoughts

External Processor

The truth will emerge and reveal itself as I speak

Aya is a new postdoc. Ed, her PI, is not sure she gets the culture here.

Aya frequently knocks on Ed's door, manuscript in hand, asking if they have a few minutes to talk.

Ed doesn't want to discourage her enthusiasm, but they've got a lot to focus on and Aya's requests feel…needy.

Ed wonders why she needs all the handholding and if she really has the ability to develop into an independent reseatcher.

Examples of perceptions you will need to manage regarding your Research Mentor's work style and perspective

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

Internal Processor

Let me think about that and organize my thoughts

External Processor

The truth will emerge and reveal itself as I speak

Amir is new postdoc in the lab.

Every time Miko comes around to check in on him and ask him about his progress – which they like to do for everyone in her lab- Amir doesn't forward ideas or talk about his work. He also doesn't speak up in meetings.

They've tried to be encouraging and supportive, but he reminds quiet.

Miko's not sure if their original impression of him as bright and engaged is correct – though he was so impressive during the interview!

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Assess your research mentor's workstyle preference: how do they think & communicate?

Learn	Feel Organized		Believe Decisions

Public Service Announcement

Want to learn how to hire and supervise people effectively?

Want to know how to manage diverse teams inclusively?

Come to our NSF supported TRAIN-UP workshops

career.ucsf.edu/Train-Up-Course

Internal Process

Let me think about that an... organize my thoughts ...eak

7 Supervisory Responsibilities

1. Set expectations/ Take baseline assessment
2. Teach, train & delegate effectively
3. Give kudos and corrective feedback continuously
4. Recognize progress & reward achievement
5. Articulate & enforce consequences
6. Manage conflict
7. Provide support

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Examples of preferences you will need to manage regarding your Research Mentor's work style and perspective

Learn	Feel Organized	**Think & Communicate**	Value, Believe & Make Decisions

7 Supervisory Responsibilities

1. Set expectations/ Take baseline assessment
2. Teach, train & delegate effectively
3. Give kudos and corrective feedback continuously
4. Recognize progress & reward achievement
5. Articulate & enforce consequences
6. Manage conflict
7. Provide support

Systematic

Let me walk you through each step so you have a thorough understanding
1. **At best:** it's organized
2. **At worst:** it's a slog

~~Organic~~ Richly Associative

It's all connected and it all comes together at the end
1. **At best:** it's dynamic and on point
2. **At worst:** it's a confusing brain dump

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Unenforceable rules in professional relationships

This is also where a research mentor's roles may conflict as both your mentor and your supervisor

Forgive for Good
A PROVEN Prescription for Health and Happiness
Dr. Fred Luskin

Expectations that we have for other people's behavior in relationships. **These expectations may be totally reasonable (or unreasonable!)** expectations for us to have, and may be based:

- **on their role** (you're a research mentor. Doesn't your role include asking questions about where I'm stuck to help me to develop my thinking?)

- **their previous performance** (I have seen you do this with others in the lab)

- **your previous experience** (my last PI made authorship decisions based on X)

What are some of your unenforceable rules?

Examples of unenforceable rules

My research mentor will:

- ask me questions to draw out my thinking say things and behave in a way that I find encouraging

- meet with me on what I consider to be an ongoing basis

- clearly tell me their preferences around how they function (e.g.: how they prefer meetings be structured, how they determine what a postdoc can take from the lab, what)

   say things and behave in a way that I find encouraging

This is where work style preferences become a 'thing'.

You want your PI to meet more frequently, behave differently in meetings, or get that manuscript back to you faster, make a different decision about which journal (and which way) to present your data. You may think that your PI is making a supervisory decision over a mentoring one (favoring their productivity over your career).

This is role conflict, work styles and unenforceable rules – they will need to be **proactively managed** and **negotiated**.

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Q: How do you teach a neuroscientist about feedback?

My unenforceable rules

- **Would ask me prompting questions**
- **Would note my concerns and say something encouraging**
- **Would give me useful information to form my thoughts**

Internal processor preference.   Richly associative preference.

So, for example,

I used to have an unenforceable rule about <u>how</u> my partner would behave when they helped me solve a problem I was facing.

I had to prepare a workshop on giving feedback for a group of neuroscientists. And I was stuck.

My partner is exceptionally knowledgeable in a range of relevant topics.

So, I wanted to find a time to talk

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Internal processor preference.   Richly associative preference.

This is how I experience conversations with my partner.

They are brilliant, and conversations with them are glorious.

But this isn't how I think. I'm a lot more systematic in conversations.

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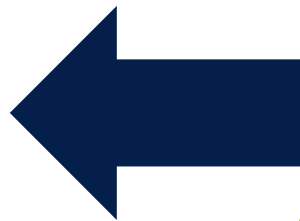Student Academic Affairs

Q: How do you teach a neuroscientist about feedback?

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dolphins

research

Creation of neural pathways

Book suggestion

Medical training

?

Progressive 7th in music theory

intermittency

?

Our kid

LeBron James

clickers

piano

harps

NYT

45 min

This is how I experience conversations with my partner.

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Internal processor preference.

Richly associative pref

This is how I behaved during this conversation, which met **#3 of my** unenforceable rules, but not #1 & #2

1. Chat first thing in morning
2. Allow for internal processing
3. Respect his boundary
4. Go to restroom
5. Get snack
6. Open laptop
7. Summarize question

- I have this interesting question. How do you teach a neuroscientist to give feedback?

Ask a focused question

- A progressive seventh?

Mirror last 3 words

- Is it unreasonable to chat for a few more minutes?

Label

- Wait, wait, that's a really interesting point. Can you repeat/ say more about that?

Deference

- So you're saying 3 things:
  1. Note the complex internal process
  2. Repetition is important
  3. Note emotion

Summarize. Show return on investment

- You've given me a lot to think about.
- Thank you for taking the time.

Appreciation

Engage them and explore their thinking

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Q: How do you teach a neuroscientist about feedback?

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- **Would ask me prompting questions**
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Internal process ~~preference~~ preference.

1. Chat first thing in morning
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4. Go to restroom
5. Get snack
6. Open laptop
7. Summarize question

- **I have this interesting question. How do you teach a neuroscientist to give feedback?**

- **A progressive seventh?**

- **Is it unreas... to chat ... few more minutes?**

Sometimes this is how my partner thinks and communicates, and this is the best way to engage his richly associate style

Now, consider your research mentor.

What engagement strategies work best for them?

...about that?

...complex ... process ...petition is important

3. Note emotion

- **You've given me a lot to think about.**

- **Thank you for taking the time.**

| Ask a focused question | Mirror last 3 words | Label | Deference | Summarize. Show return on investment | Appreciation |

Engage them and explore their thinking

Engage 201: Get a handle on their workstyle preferences

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

They don't understand your problem & how it's affecting your productivity

⬅ **Teach**   **Negotiate** ➡

They have different priorities, and/or It's not in their interest to understand your problem and how it's affecting your productivity

One more thing

How does your research mentor best understand and appreciate work, progress and problems?

Engage 201: Get a handle on their workstyle preferences

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

How does your research mentor best understand and appreciate work, progress and problems?

They don't understand your problem & how it's affecting your productivity

← **Teach**

Your PI may not know Something and unintentionally set expectations that are not achievable.

In these moments how does your PI best learn?

PI has unreasonable expectation

Your PI works with flies. You work with mouse models. They just cheerfully said that their goal for you is to run your experiments, analyze your data and write up your results in 6 months. You don't understand how they could possibly think that – they understand how mice reproduce don't they? Maybe it's because they need some publications to push out. You're now stressed out.

How can can your PI best understand that that is not a reasonable time frame when working with animals?

Engage 201: Get a handle on their workstyle preferences

Learn	Feel Organized	Think & Communicate	Value, Believe & Make Decisions

How does your research mentor best understand and appreciate work, progress and problems?

Let me watch you do it, show me what's happening, where's your data?

Visual

Walk me through your findings, tell me a story.

Aural

Your PI may not know Something and unintentionally set expectations that are not achievable.

In these moments how does your PI best learn?

Did you write up your findings, let me read your manuscript. I'll get back to you.

Reading/Writing

How does your PI learn?

Step aside and let me try to figure it out. Comments welcome!

Experiential

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Engage 201: Get a handle on their workstyle preferences

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But other times your PI may have t expectations that more clearly serve them as a supervisor leading a lab more than they serve you as a mentee pursing your career goals.

(unless managed, this is another Example of role conflict for PIs.

Negotiate ➡

They have different priorities, and/or it's not in their interest to understand your problem and how it's affecting your productivity

Ex. from Chronicle of Hire Ed. forum

PI has an unappealing expectation

Your PI wants you to work on a project that another postdoc left and hopefully publish by the end of the year. They acknowledge that "Our results are not as exciting as I hoped," but they want you "to reframe them or identify related opportunities."

You're not convinced by the actual data because it doesn't reject most of the null hypotheses. You think your PI is pushing you because they need a publication out and have invested a lot of time/energy into it already. **How can you convince them this isn't a good idea?**

Get a handle on workstyles

	Think & Communicate	Value, Believe & Make Decisions

"Okay, I have an idea that you might find unreasonable.

Do you think it's ridiculous to push out this data X and do experiment Y for the paper in two months?

And if not, could I Z (attend the MIND course, work on A project and attend B conference, etc.)?"

Negotiate ➡

They have different priorities, and/or it's not in their interest to understand your problem and how it's affecting your productivity

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You're not convinced by the actual data because it doesn't reject most of the null hypotheses. You think your PI is pushing you because they need a publication out and have invested a lot of time/energy into it already. **How can you convince them this isn't a good idea?**

You probably can't.

Your options are to either give them a better idea, or to negotiate something you want while/in exchange for moving forward on their idea.

If you've tried a couple of times already, don't waste more time trying to explain why their idea is bad – this won't be fixed by teaching. Instead confirm their underlying interest – publishing? Publishing this specific data? Etc., and start negotiating from there.

Also acknowledge the role conflict (mentor vs supervisor), and the burn of the unenforceable rule.

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Get a handle on workstyles

	Think & Communicate	Value, Believe & Make Decisions

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In these situations, you are negotiating with your PI, not conversing with your mentor.

It may serve your goals (if you're going on the academic market, it may help your publication record), but it can feel like it doesn't help you at all.

You might think – 'aren't you supposed to be my mentor?'

This can feel confusing, or like a betrayal. It certainly feels like conflict, because it is! Which is why Engage 301 is a thing.

Understanding conflict and negotiation

Let's get to it.

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Engage 301: Get a handle on your perceived and real conflicts

1. **Get a handle on your meetings**
   (These are the focused container for your interactions)

2. **Get a handle on your differing workstyle preferences**
   (Believe them. They are real)

3. **Get a handle on your perceived and real conflicts**
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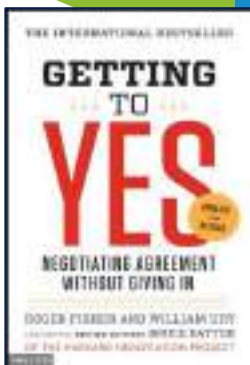UCSF Office of Career & Professional Development
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Engage 301: Get a handle on your perceived and real conflicts

- My take? Chris Voss's (former FBI hostage negotiator) approach fits more neatly with the specific challenges that biomedical trainees face than William Ury's Getting to Yes.

- Although Ury's definition of negotiation is on point:

What is **Negotiation**? "A back-and-forth communication designed to reach an agreement when you and the other side have some interests that are shared and others that are opposed."

-Getting to Yes

blog.blackswanltd.com

YouTube

Chris Voss: The Art of Letting Other People Have Your Way #TheKnowledgeProject

I'm assuming you don't have time to read both books, so we're using Voss.

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Engage 301: Get a handle on your perceived and real conflicts

Never Split the Difference by Chris Voss   Summary Cheat-Sheet

Goal	• People want to be **understood** and **accepted**. 2 primal urges: ○ Need to feel **safe & secure** ○ Need to feel **in control** • **Listen intensely** → demonstrate empathy - show a **sincere desire** to better understand what the other side is experiencing
Prepare	• Goal reveal **surprises** in the negotiation • Hypotheses vs. assumptions: Use negotiation to **test hypotheses** • Uncover as much information as possible (not bottle of arguments) • Uncover what counterpart **actually needs** (money, emotional, otherwise) → get them **feeling safe** to talk more • Sole focus: the other person and what they have to say
Mirror	• **Repeat the last (or critical) 3 words** of what someone else has said • Insinuates similarity which facilitates bonding • Connectors because they help your counterpart connect thoughts
Mirror Process	1. Use Late Night FM DJ Voice 2. Start sentences with *I'm sorry.* 3. Mirror 4. **Silence**, at least 4 seconds to let mirror work its magic 5. Repeat
Labels	• Validate someone's emotion by acknowledging it • It seems like _____ • It sounds like _____ • It looks like _____ • **Pause** to let the label sink in. Other party will fill • Every 4th verbalization should be a label.
Neutralize the Negative	• Focus first on **clearing the barriers** to ___ • Label fears to diffuse their power • *Look I'm an asshole* Process: 1. Observe without reaction & judgement 2. Label each negative feeling 3. **Replace with a positive, compassion...**
Accusation Audit	• List the worst things my counterpart c... • Use labels to reinforce & encourage po... • Remove *I understand* from your vocabulary...

This is just an overview. There are a couple of places You can learn more about Voss's style

blog.blackswanltd.com

Read ← | **Listen** ↑

YouTube

Chris Voss: The Art of Letting Other People Have Your Way #TheKnowledgeProject

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Engage 301: Get a handle on your perceived and real conflicts

We've started

▪ I've got an interesting question for you. How do you teach a neuroscientist to give feedback?	▪ A progressive seventh?	▪ Is it unreasonable to chat for a few more minutes?	▪ Wait, wait, that's an interesting point. Can you repeat/ say more about that?	▪ So you're saying 3 things: 1. Note the complex internal process 2. Repetition is important 3. Note emotion	▪ You've given me a lot to think about. ▪ Thank you for taking the time.
Ask a focused question	**Mirror last 3 words**	**Label**	**Deference**	**Summarize to show return on investment**	**Appreciation**

Engage them and explore their thinking

Prep Engage 301: Get a handle on your perceived and real conflicts

1. **What do you want?** (think of your 20 questions assessment)

2. **What does your research mentor want?** According to Voss, everyone wants to be understood and accepted. We need to feel safe, secure and in control.

3. **What is a neutral summary of the facts and circumstances that bring you to the conversation that the your research mentor would agree with – they would say "that's right"**

4. **Eliminate deal breakers before you make deals.** What would stop them from doing what you want? What fears does your research mentor have? Perhaps that you are going to waste their money, or their time, won't be productive, take their work, etc. Everybody is driven by loss aversion. What are they trying to avoid? "Fear gets in the way of deals".

5. **What's your core value again?** How do you want to show up to this meeting?

6. **How does your ask show up in your meeting? Will they want to internally process?** How do you signal with an email, give them a head's up? Put it on your agenda? Break it up? (Can we review the abstract & intro)? What's would be your approach if this was your situation?

All of this is only a small taste of Voss's work.

Read his book, his blogs, listen to his work on YouTube and podcasts.

Prospect (loss aversion) theory is an economics theory developed by Daniel Kahneman 2002 Economics Nobel Prize) and Amos Tversky in 1979. "*losses* loom larger than gains"

PI has an unappealing expectation

Your PI wants you to work on a project that another postdoc left and hopefully publish by the end of the year. They acknowledge that "Our results are not as exciting as I hoped," but they want you "to reframe them or identify related opportunities." You're not convinced by the actual data because it doesn't reject most of the null hypotheses. You think your PI is pushing you because they need a publication out and have invested a lot of time/energy into it already. **How can you convince them this isn't a good idea?**

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1. **Introduce an extreme anchor**: An opening to lower – or set - expectations. "I've got a lousy proposition for you" "You're not going to like this." "I have a big ask."

2. **Or start with getting them to a no, an/or do an an accusation audit:** Consider: What do PIs say about students and postdocs and why they are reluctant to work with them? Say that. Articulate the situation negatively with labels to defuse landmines. "You might think that I'm wasting you time with some pie in the sky idea." (No. No. Tell me. I've got ten minutes). You might ask for another no for permission: "Is this a bad time to talk about this?" (No. No. Tell me. I've got ten minutes).

3. **Listen. Ask calibrated questions that elicit information**. "Empathy saves time." Let the other person talk (70%/30%). Proactively listen for the negative, for the loss, for what they are worried about. Listen and look for any telegraphing of concerns with language and tone. Don't override or ignore it – if they hesitate, or sigh at something you say, say, "It sounds like there's more here that meets the eye." "Sounds like there is something that's making you hesitate." "It sounds like you may have some concerns."

4. **Expect the no.** (They will feel more in control or as if they have already drawn a line)

5. If the person is thinking, don't say, "What are you thinking?" say something like "You seem like you may have some next steps in mind."

6. **And look for black swans:** Listen for things that you don't know. After every conversation you should have new data.

All of this is only a small taste of Voss's work.

Read his book, his blogs, listen to his work on YouTube and podcasts.

Yes, there will be more conversations. Remember how we talked about relationships being dynamic and iterative processes?

PI has an unappealing expectation

Your PI wants you to work on a project that another postdoc left and hopefully publish by the end of the year. They acknowledge that "Our results are not as exciting as I hoped," but they want you "to reframe them or identify related opportunities." You're not convinced by the actual data because it doesn't reject most of the null hypotheses. You think your PI is pushing you because they need a publication out and have invested a lot of time/energy into it already. **How can you convince them this isn't a good idea?**

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Student Academic Affairs

Working with the no: note your ego

Seek first to understand and then be understood.

They say

↓

No

...and you say

↓

Can you tell me more about what factors influenced your decision?

Use what and how, not why - which makes people defensive

NEVER SPLIT THE DIFFERENCE
NEGOTIATING AS IF YOUR LIFE DEPENDED ON IT
CHRIS VOSS

Then they say

↓

REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS
REASONS

If you're a human being, you are probably going to want to do one of these.

Don't.

TALK	TALK	TALK	TALK	GET OUT	ASK & LISTEN
Defend yourself	Correct their errors	Explain your perspective	Accuse them of unfairness	Go silent	Inquire — Ask questions. UNDERSTAND THEIR INTEREST

Do this Instead *

& document

↓

Ask, inquire, clarify, probe, discuss, confirm, listen

* Unless you feel unsafe or unable. Then do this ↑

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Think of your last disagreement. What did you do? What could you have have done to uncover their interests?

ASK QUESTIONS

1. What's influencing your thinking?
2. What (other) factors shaped your decision?
3. How did you come to that conclusion?
4. What motivated you to say that?
5. Could you say more about your thinking?
6. Can you share how you're seeing the situation?
7. When did that become clear to you?
8. What concerns do you have?
9. Could you talk about some examples?
10. What level/type of performance would you need to see?
11. Can you share some examples of that?
12. How would you describe some examples of 'demonstrating commitment'? (or whatever value 'taking initiative', etc.)
13. How could I have handled this differently?

Okay, I have an idea that you might find unreasonable. If I push out this data X and do experiment Y for the paper in two months, could I Z (attend the MIND course, work on A project and attend B conference, etc.)?

USE PROACTIVE LISTENING & TACTICAL EMPATHY

1. It sounds like you wanted me to let you know what I did on my side to figure out the answer before coming to you.
2. It sounds like you wanted me to listen more.
3. Seems like you think I'm being unreasonable?

Signal that you value their interests

- **DON'T SETTLE FOR THEIR POSITION** (Students can't do internships)
- **UNCOVER THEIR INTEREST** (I'm concerned that if a student does an internship they won't be productive and then will leave, making them a drag on my productivity)

Defend yourself	Correct their errors	Explain your perspective	Accuse them of unfairness	Go silent

What's Your Core Value?

Honestly, this is difficult to hear, but please continue. **I want to improve.**
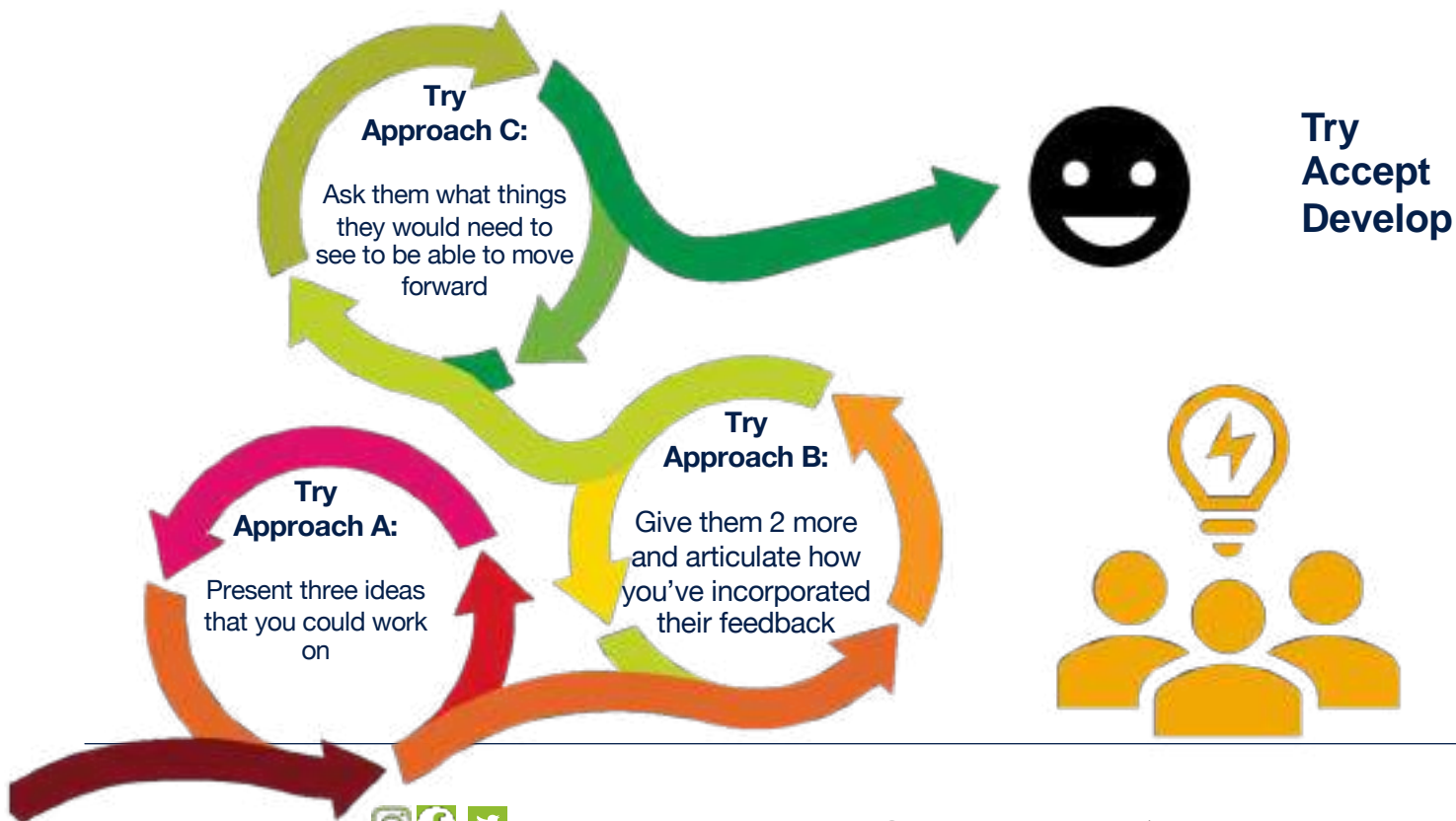
& document

ASK & LISTEN

Inquire

Ask questions. UNDERSTAND THEIR INTEREST

Ask, inquire, clarify, probe, discuss, confirm, listen

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Your professional relationship with your research mentor is like just your research: dynamic and iterative

Remember

Try Approach C:

Ask them what things they would need to see to be able to move forward

Try Approach A:

Present three ideas that you could work on

Try Approach B:

Give them 2 more and articulate how you've incorporated their feedback

Try Accept Develop

- ...And it may take awhile to pin down what's not working for you.

- And it's okay to not know. But you keep refining your ask as long as you reasonably can, at which time you might find another way to move forward.

- **Structure and curiosity helps.**

  + Community

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That's engaging your Research Mentor. Now let's talk about how your community of magnificent people can also help you manage your relationship with your Research Mentor

Engage my wider community

What are you fighting about?

I'm not clear on, or disagree with my Research Mentor regarding…

1. *(Research, training or career)* **goals, priorities and/or directions**
   (e.g. what you should be doing)

2. **Performance benchmarks and preferred conduct**
   (e.g. to what level should you be doing it and how you should behave while you're doing it)

3. **Roles and responsibilities**
   (e.g. who controls key decision points, etc.)

4. **Strong/different personalities**

When things breakdown in professional relationships, they frequently breakdown in in one of four areas

What type of support would be helpful from your wider community?

What are you fighting about?

I'm not clear on, or disagree with my Research Mentor regarding…

When things breakdown in professional relationships, they frequently breakdown in in one of four areas

1. *(Research, training or career)* **goals, priorities and/or directions**
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3. **Roles and responsibilities**
   (e.g. who controls key decision points, etc.)

4. **Strong/different personalities**

" I don't think my mentor and I ever mutually agreed on expectations of professional behavior but for all the strained conversations, we had some professional boundaries that made for a workable relationship, mutual respect, and a modicum of trust."

"As we both matured, we (I at least) realized that our conflict was trivial and we blew it up more than it needed to be."
https://www.chronicle.com/forums/index.php?topic=199831.15

Who's in my *Community of Magnificent People?* *(COMP)*
[COMP]ensating for the support you can't solely get from your PI

The most accessible form of individual power students and postdocs have will be **information.**

One of the most accessible form of strength you will gain is from community

Sources of Power

John   Bertram FRENCH & RAVEN
Referent
Legitimate
Expert
Reward
Coercive
Informational

Two social psychologists who studied sources of power

INDY: INDEPENDENCE

CAS: CAREER EXPLOR.

PEARL: PERSONAL

PETE: PROGRESSION

You need community to help balance the power differential in your relationship
*Also, your PI can't do and be everything you'll need to succeed. You'll need multiple mentors

John French & Bertram Raven: 2 social psychologists who argued that there are 6 bases of power:

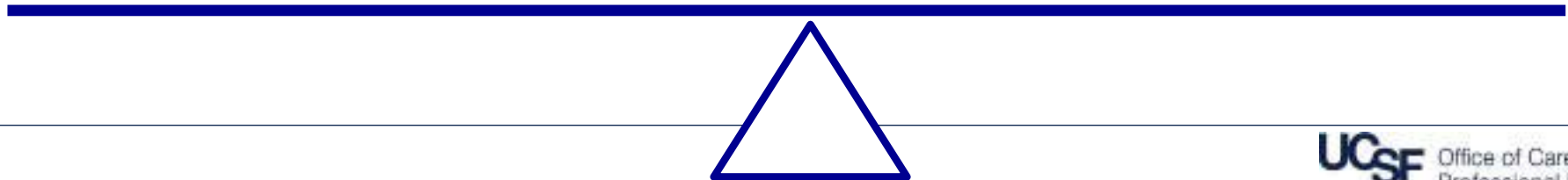|	
1. Legitimate:	Your official right to make demands and to expect others to do what you say.
2. Referent:	Your reputation: Your perceived worthiness and right to others' respect.
3. Expert:	Your level of knowledge and skill in a particular area.
4. Reward:	Your ability to reward people for doing want you want.
5. Coercive:	Your ability to punish others for not doing what you want.
6. Informational:	Your ability to control the access to information that someone else needs to accomplish something.

You need community to help balance the power differential in your relationship
*Also, your PI can't do and be everything you'll need to succeed. You'll need multiple mentors

And each of these bases of power sit more naturally with the PI.

1. Legitimate:	Your official right to make demands and to expect others to do what you say.
2. Referent:	Your reputation: Your perceived worthiness and right to others' respect.
3. Expert:	Your level of knowledge and skill in a particular area.
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You need community to help balance the power differential in your relationship
*Also, your PI can't do and be everything you'll need to succeed. You'll need multiple mentors
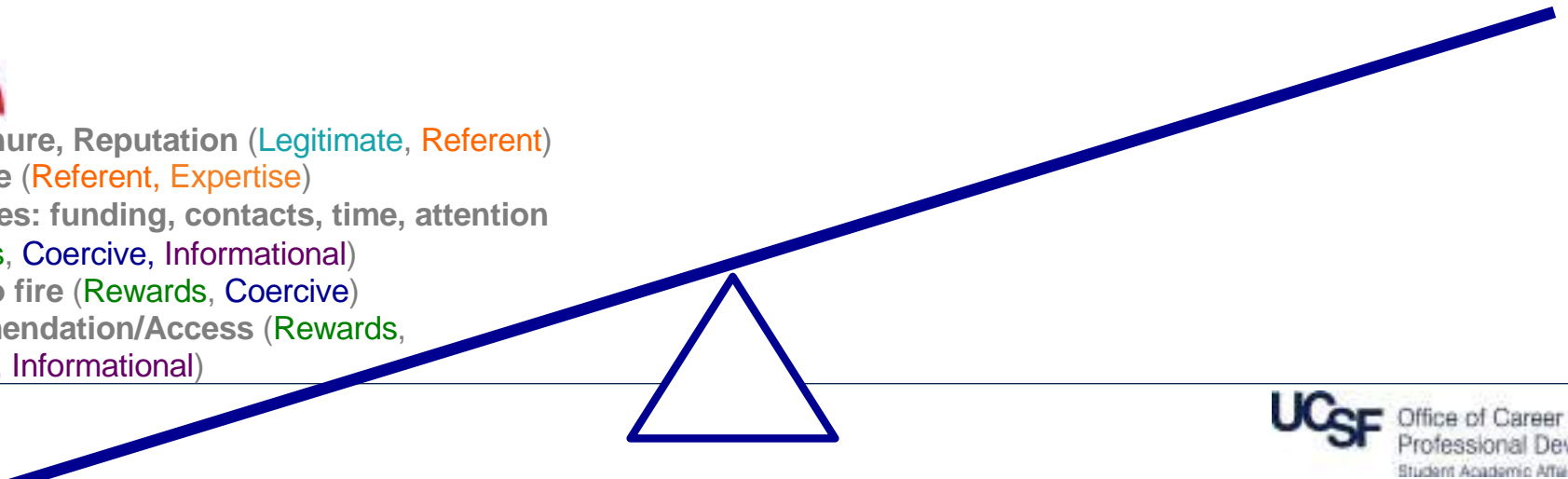
And each of these bases of power sit more naturally with the PI.

Senior Scientist   **Student, Postdoc**

You need community to help balance the power differential in your relationship
*Also, your PI can't do and be everything you'll need to succeed. You'll need multiple mentors

And each of these bases of power sit more naturally with the PI.

Senior Scientist   **Student, Postdoc**

1. **Title, Tenure, Reputation** (Legitimate, Referent)
2. **Expertise** (Referent, Expertise)
3. **Resources: funding, contacts, time, attention**
   (Rewards, Coercive, Informational)
4. **Ability to fire** (Rewards, Coercive)
5. **Recommendation/Access** (Rewards,
   Coercive, Informational)

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You need community to help balance the power differential in your relationship
*Also, your PI can't do and be everything you'll need to succeed. You'll need multiple mentors

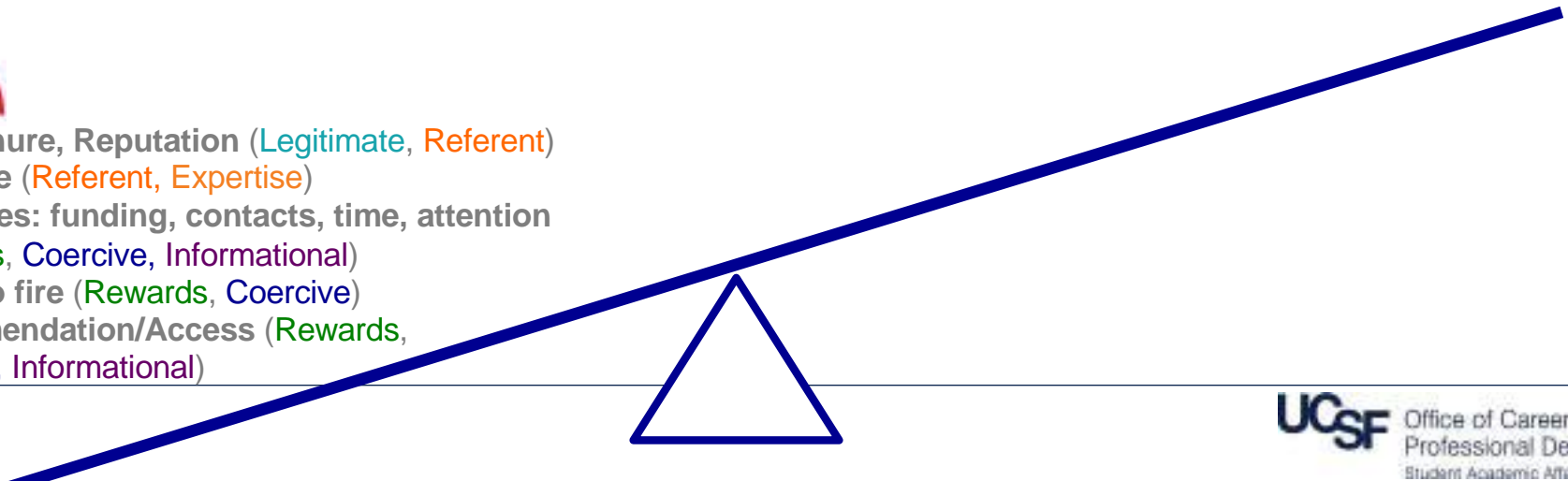And each of these bases of power sit more naturally with the PI.

Senior Scientist   **Student, Postdoc**

It's difficult to tip the balance back on your own. For that you'll need community. A community who has information, experience, resources and position.

1. **Title, Tenure, Reputation** (Legitimate, Referent)
2. **Expertise** (Referent, Expertise)
3. **Resources: funding, contacts, time, attention** (Rewards, Coercive, Informational)
4. **Ability to fire** (Rewards, Coercive)
5. **Recommendation/Access** (Rewards, Coercive, Informational)

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Who's in my *Community of Magnificent People?* (COMP)

[COMP]ensating for the support you can't solely get from your PI

You, at the center of your professional universe

Your Research Mentor

Current and past people in the lab

People at your institution

People in your field/ in your world

INDY: INDEPENDENCE

CAS: CAREER EXPLOR.

PEARL: PERSONAL

PETE: PROGRESSION

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Who is at UCSF? You can make appointment! Check out their website!

Questions or Concerns?	
Career of Professional Development	• Office of Career and Professional Development counselors (**career.ucsf.edu**)
Progression & Independence	• Assistant Dean of Postdoctoral Scholars (**postdocs.ucsf.edu**) *postdocs* • Associate Dean of Graduate Programs (**graduate.ucsf.edu/about**) *students* • Office of Career and Professional Development (**career.ucsf.edu**)
Learning	• Learning Resource Center Advisors (**learn.ucsf.edu**) *students* • Dean of Postdoctoral Scholars [OPS] (**postdocs.ucsf.edu**) *postdocs*
Psychological Support	• Student Health and Counseling Counselors (**health.ucsf.edu**) *students* • Faculty and Staff Assistance Program Counselors (**tiny.ucsf.edu/FSAP**) *postdocs*
Discrimination & Harassment	• **Care Advocate*** (**careadvocate.ucsf.edu**) – specifically sexual harassment • **Office of the Ombuds*** (**ombuds.ucsf.edu**) • Office for the Prevention of Harassment and Discrimination [OPHD] (**ophd.ucsf.edu**) • Assistant Dean of Postdoctoral Scholars (**postdocs.ucsf.edu**) *postdocs* • Associate Dean of Graduate Programs (**graduate.ucsf.edu/about**) *students*

Questions or Concerns?	
Disability Support	• Student Disability Services (**sds.ucsf.edu**) *students* • Dean of Postdoctoral Scholars (**postdocs.ucsf.edu**) *students*
Legal	• Community Legal Resources (**success.ucsf.edu/legal-resources**) • Union of Postdoctoral Scholars (**uaw5810.org**)
Advocacy & Support	• Assistant Dean of Postdoctoral Scholars (**postdocs.ucsf.edu**) • Associate Dean of Graduate Programs (**graduate.ucsf.edu/about**) *students* • Assistant Dean for Diversity and Learner Success (**graduate.ucsf.edu/about**) • International Students and Scholars Office Advisor (**isso.ucsf.edu**) • Lesbian, Gay, Bisexual & Transgender Resources staff (**lgbt.ucsf.edu**) • First Generation Support Services. Services [Under the Assistant Vice Chancellor, Student Life] (**studentlife.ucsf.edu/about**) *students* • Student Veteran and Military Support Services [Under the Assistant Vice Chancellor, Student Life] (**studentlife.ucsf.edu/about**) *students* • Director of Student Rights and Responsibilities (**studentlife.ucsf.edu/student-conduct-and-discipline**) *students*

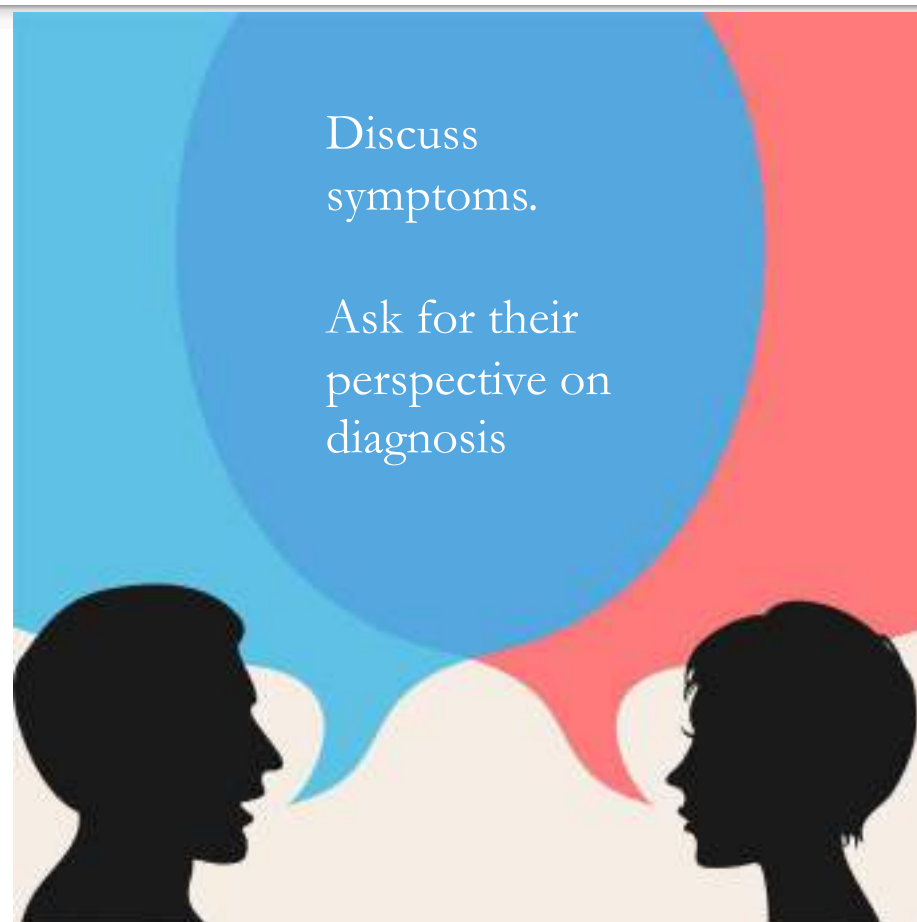*** Denotes no mandated reporting requirements (they are entirely confidential)**

UCSF Office of Career & Professional Development
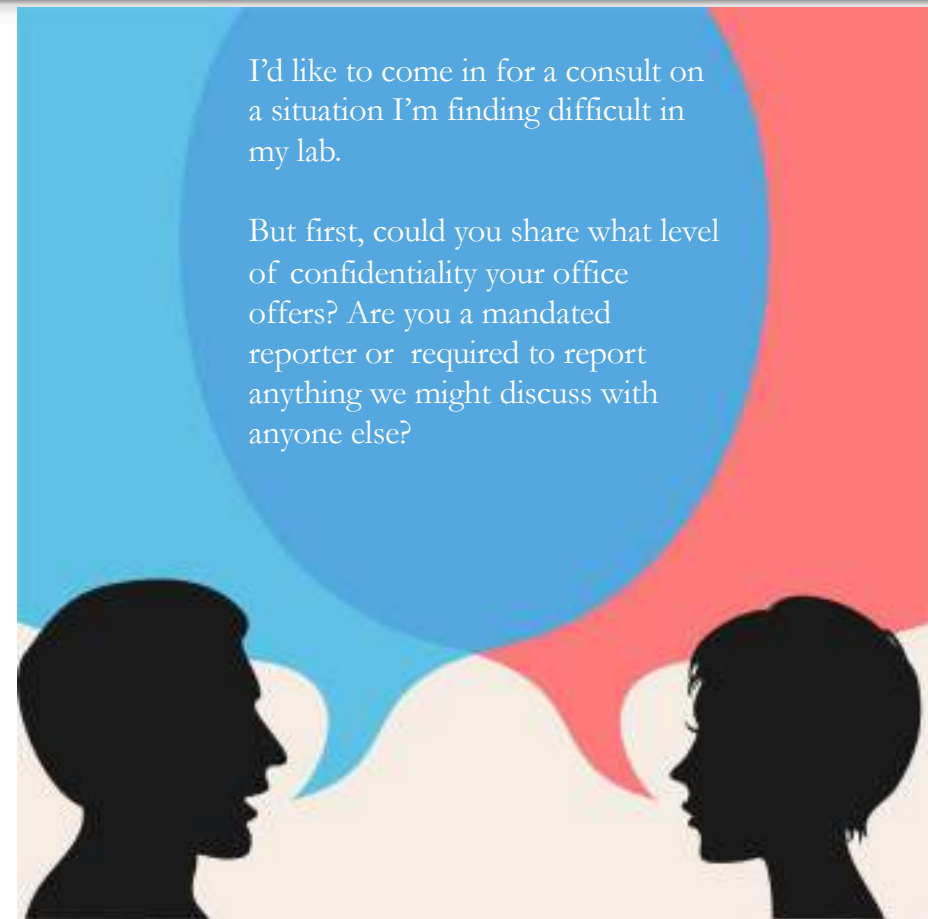Student Academic Affairs

How to talk to Your Community of Magnificent People (COMP)

- Don't tell story chronologically, unless asked to do so.

- ***Pick themes or 'the interesting question' instead and identify the main issue***

- Rather than accusations, focus on information gathering

- Give them the abstract first: "I realize I'm unfamiliar with the process of deciding who is first author," or "I'd like some advice about how to consider my contribution to a paper that was recently submitted"

- Ask for advice, perspective…particularly how others have handled such situations, or what they would do.

- It's you'rp roblem, but it may be their story.

Discuss symptoms.

Ask for their perspective on diagnosis

Previous, senior, fellow lab members

- How long was it before you were clear on progression goals/what you would be able to take?

- Did it work better to push out information (I have 3 working ideas of projects I could take with me", or to ask for guidance "How would you like us to have a conversation/decide"

- My next goal is to talk to my PI about X. Would you be willing to brainstorm the best ways to do that for about 30 minutes?
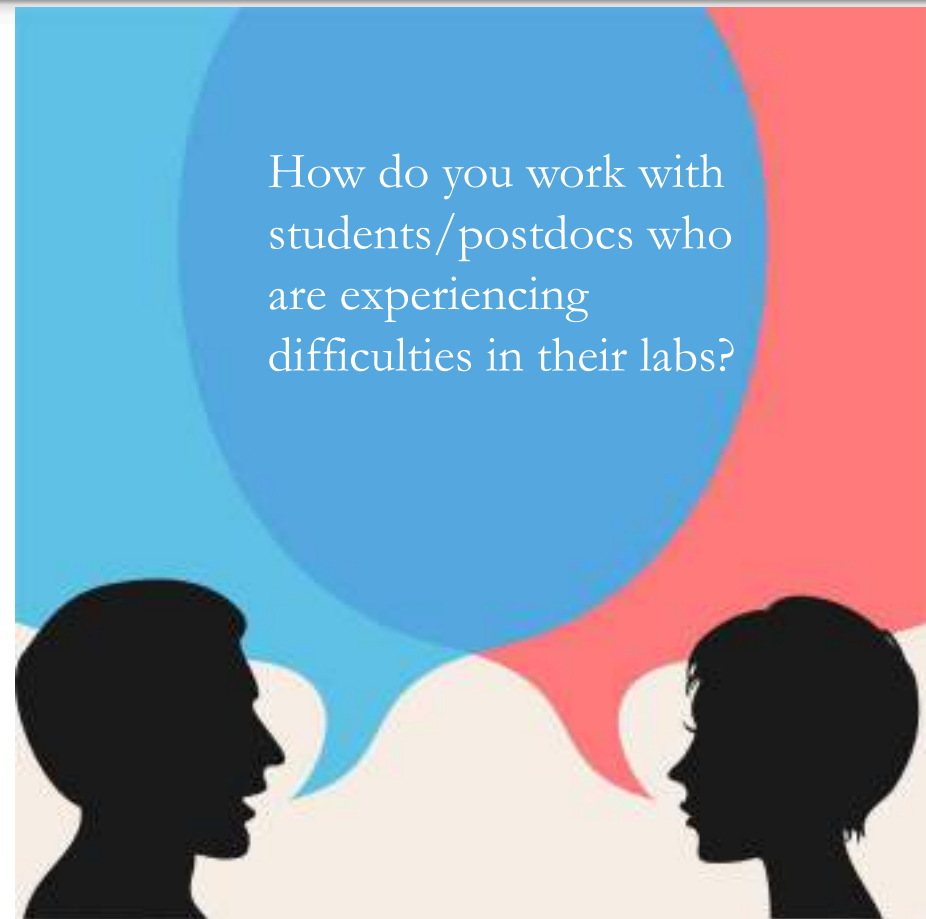
I'd like to come in for a consult on a situation I'm finding difficult in my lab.

But first, could you share what level of confidentiality your office offers? Are you a mandated reporter or required to report anything we might discuss with anyone else?

Institutional support

- "I'd appreciate your advice about a situation in a collaboration I'm a part of. I've discussed it with my PI, but I would also appreciate an outside perspective. Could we talk for about 15 minutes?"

- In established a collaboration that may hitting some difficulties, Initially, there was a verbal agreement between all parties, that I would be first author; but yesterday in a meeting, another postdoc was mentioned.

  I'm not sure how to approach this. I'm reaching out to people I respect for advice.

- I'd like to come in for a consult on a situation I'm finding difficult in my lab.
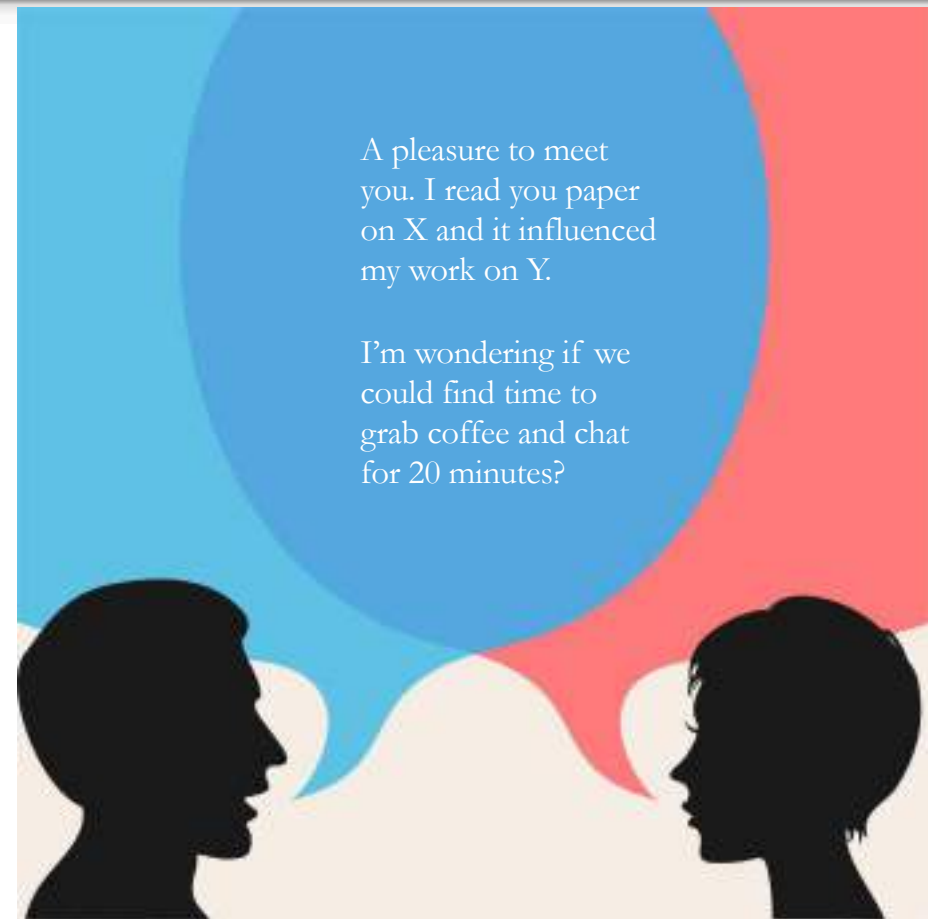
  But first, could you share what level of confidentiality your office offers? Are you a mandated reporter or required to report anything we might discuss with anyone else?

How do you work with students/postdocs who are experiencing difficulties in their labs?

Colleagues in your wider community

"I'd appreciate your advice about a situation in a collaboration I'm a part of. I've discussed it with my PI, but I would also appreciate an outside perspective. Could we talk for about 15 minutes?" Thank you for meeting with me

• My next goal is to talk to my PI about X. Would you have time to brainstorm the best ways to do that for about 30 minutes? I just want to see if I'm on the right track.

• I see that you lead postdoc parents'. I'm wondering if we could chat by skype for 30 minutes?

• I have 3 ideas about potential independent projects I would like to pitch to my PI. Could I find 30 minutes on your calendar in the next two weeks? Or, would you like me to summarize them by email for you first?

A pleasure to meet you. I read you paper on X and it influenced my work on Y.

I'm wondering if we could find time to grab coffee and chat for 20 minutes?

My Four Options

Engage no one; gather information and muddle through

1 Assess and define your issue

2 Understand your overall strategic options

3 Engage skillfully

Is Managing Up

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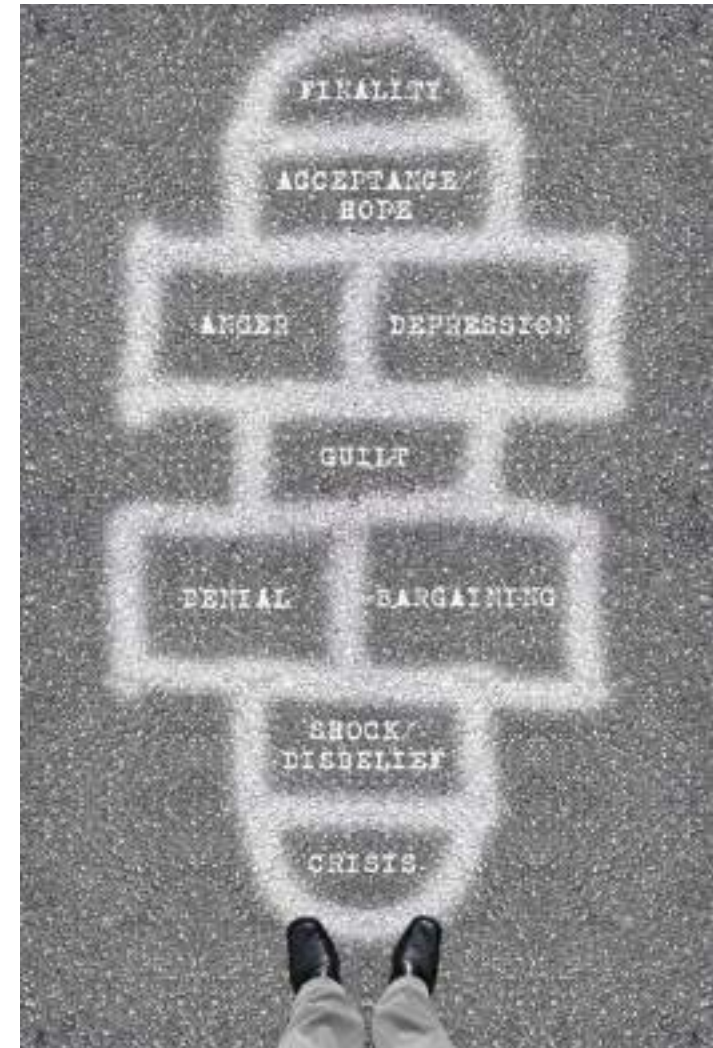
If you decide not to engage, or to leave, then what will help to proactively cope?

- The same care and consistency you have for handling toxic elements in your lab, needs to be employed in managing bad fit or toxic situations.
- It can be difficult to maintain productivity and morale (and your well being). Engage in self care aggressively. Breathe more. Take more breaks. Watch more comedies and laugh.
- Consider lower level engagement as you find your way. You may not want to talk to anyone, but what about anon. internet support (reddit, academic stacks, the Chronicle of Higher Ed forum, etc. online encouragement, etc.?
- **Move when you're ready, but:** What one thing would help you move closer to engaging in some of these tactics with your research mentor of your community of magnificent people?

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My Four Options

Remove myself from the situation

1 Assess and define your issue

2 Understand your overall strategic options

3 Engage skillfully

Is Managing Up

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bitesizebio.com/3908/phd-students-should-you-switch-labs/

If you decide it is indeed time to find a new lab, here are some tips for making a smooth transition:

1. **Find out who is hiring.** Your departmental coordinator may be able to tell you who is willing to take on new graduate students and who is definitely not interested in new students. This can help you narrow your search and give you an idea of your likely options. Other students can offer insight into their own labs and whether opportunities exist.

2. Arrange a new lab first. You don't want to find yourself without a lab (or stipend)! Get all your ducks in a row before moving forward and always keep the option of staying in your current lab until the last possible moment.

3. **Compile and organize your data for your PI.** Consider that another student will likely pick up your project so make it easy on him or her. Your PI will appreciate it as well and will be less likely to have any "hard feelings" about your departure.

4. **Avoid blowback. You** will probably see your PI in the future at seminars and departmental functions, so it is best to leave amicably. Even if you are frustrated, don't burn any bridges.

5. **Hit the ground running.** Once you've started in your new lab, don't dawdle! You have to make up for lost time. It may seem like you've taken a step back at first, especially while formulating a new project, but putting in the extra effort up front will help you stay positive and focused as you embark on your new path.

Changing labs …is big, but sometimes necessary, step. Hopefully these tips will help you make the right decision.

At UCSF:
Check in with your Associate Dean, Grad Division or Postdoc Dean. They can help you consider your options and navigate this process.

2/15/20

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If you decide to leave

- We encourage you to check in with your appropriate (and fantastic!) deans, Drs. Silva and Monsalve, or reach out to someone in your community of magnificent people (like the Ombuds!) of another on or off campus mentor) to discuss it, because sometimes people leave not because they want to go, but because they just don't know how to navigate staying, You might feel there is too much water under the bridge. You might feel to embarrassed to try to figure out how to make something work with your PI. You might feel too exhausted to try.

- And sometimes there is something going on with either you or your situation that leaving really is the best decision. But it's rarely an easy one.

- But for some students and postdocs, discreetly researching the process to stay – and knowing they have options – gives them the psychological safety to figure out how to stay. For others, a conversation with your dean helps you figure out how to professionally leave and figure out what needs to be negotiated. Your PI may even be shocked that you thought things were bad enough to leave, or be frustrated. These are factors that almost always benefit all parties if someone neutral, like the deans or ombuds, are at least aware of your situation and, at times, are coaching you to a good outcome.

- Once again, remember your core values and qualities. How do you want to engage? Even asking "How can I engage in this decision with my definition of integrity (respectfully, strategically,etc.) can help you manage a challenging situation professionally.

At UCSF: Check in with your Associate Dean, Grad Division or Postdoc Dean. They can help you consider your options and navigate this process.

If you decide to leave

Really, it doesn't matter who you are, if you're going through a challenging situation in pursuit of your goals, getting some additional coaching is a solid idea!

Let's put some parameters around what it means to manage professional relationships. No matter what the issue, there really are only four options

The Ability To...

Engage my wider community

Engage no one; gather information and muddle through

Engage my Research Mentor

Remove myself from the situation

1 Assess and define your issue

2 Understand your overall strategic options

3 Engage skillfully

Is Managing Up

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What did you learn today?

You know yourself

Your Core Strategy

You've narrowed down on key issues

Assessing your relationship with your research mentor

You have an overview of your options and how to engage

Four overarching strategies in managing up

You probably have questions. Consider your community!

Q&A

Managing Your Relationship With Your Research Mentor
Naledi Saul

UCSF Office of Career & Professional Development
Student Academic Affairs

- **Thank you for coming!**

- **And congratulations on taking the time to invest in your own career and professional development! We see you!**

- **Know someone who needs help? Peer mentor by sharing the slides!**

- **Don't forget to check out the rest of the *Manage Up Series!***

- **Next up: Finding your 5 mentors and a sponsor!**

- **Career.ucsf.edu/ManageUp**

Managing Your Relationship With Your Research Mentor

Naledi Saul

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