More Than the Work:
The First 90 Days - How to Establish Yourself In A New Position
Many of us are focused on the work

- Determining what we have to do, learning the information and developing the skills to do it
- Because we believe that our work will speak for itself and solidify our reputation.

But it can help helpful to give equal consideration to a set of skills known as workplace navigation skills, many of which span negotiating professional relationships.

1. Situational awareness and problem-solving
2. Interest-based negotiation
3. Backward-designing training and professional goals
4. Positioning oneself
5. Managing professional relationships (being mentored, finding collaborators, etc.)
6. Mentoring and managing others
7. Navigating organizational politics
Engaging strategically (and with personal integrity!) in professional relationships is the combination of:

1. **Self awareness**
   of your values, goals and preferences which shape your decisions, actions and behaviors.

2. **Curiosity about the other person**
   their values, goals and preferences, which are the basis their decisions, actions and behaviors.

3. **The ability to engage in workplace navigation skills**
   such as strategic relationship building, effective arguing*, and interest-based negotiation that helps you navigate your career successfully.

Be able to:

1. Reflect on your own values and preferences

2. Articulate factors that are useful to assess in professional relationships

3. Identify resources and strategies to navigate professional relationships with integrity
Assess, strategize and navigate for success
What are your values? How do you want to show up, professionally?

- What are my values?
What are your values? How do you want to show up, professionally?

- What are my values?
  - Being Strategic & Civil
What are your values? How do you want to show up, professionally?

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

- Accountable
- Adaptable
- Adventurous
- An Advocate
- Agile
- Ambitious
- Assertive
- Authentic
- Balanced
- Bold
- Brave
- Calm
- Creative
- Civil
- Composed

- Compassionate
- Common Sense
- Cooperative
- Courageous
- Curious
- Decisive
- Diplomatic
- Disciplined
- Engaged
- Equanimous
- Equitable
- Ethical
- Empathetic
- Fair
- Faith-Minded
- Family-Oriented
- Fearless
- Friendly
- Growth-Minded
- Healthy
- Honest
- Hopeful
- Humble
- Humorous
- Inclusive
- Innovative
- Joyful
- Just

- Kind
- Logical
- Open Minded
- Optimistic
- Patient
- Patient-Centered
- Patriotic
- Perseverance
- Perfectionist
- Playful
- Positive
- Proactive

- Respectful
- Responsible
- Restrained
- Savvy
- Self-confident
- Self control
- Serene
- Service-Minded
- Stewardship
- Strategic
- Team-Oriented
- Tenacious
- Tolerance
- Thoughtful
- Thorough
- Transparent
- Trustworthy
- Unflappable

How you function with integrity

How you make decisions

How you communicate

How you organize yourself and your work

How you handle conflict and change

Being Strategic & Civil

- Pragmatic
- Rational
- Reason
- Recognition
- Reliable
- Reflective
- Resourceful
- Resilient

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Activity A: Discuss a core value and how it shows up (or you’d like it to show up) in the lab
Activity B: How do you want to show up to work; what's your value?
Ask yourself…this afternoon: Are you showing up with your definition of integrity?

PI: “You misunderstood me; you’re not first author.”

Colleague in lab meeting: “That’s a stupid idea.”

How you function with integrity

Avoidance

Nuclear option

+ quietly quit

How you make decisions

How you communicate

How you organize yourself and your work

How you handle conflict and change
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**STEP 01**
What are my core values?

**STEP 02**
What are options for someone who holds these values?

**STEP 03**
What subset of these options gets me closer to my goals (and does not result in my unnecessary martyrdom)?

❖ Being strategic & civil

❖ ___________________
❖ ___________________
❖ ___________________
❖ ___________________

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How you function with integrity

How you make decisions  How you communicate  How you organize yourself and your work  How you handle conflict and change

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Assess, Strategize and Navigate…With Integrity
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What are 1-2 core values or qualities for them?

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Based on how they make decisions, communicate, organize themselves and handle conflict and change, how would you describe your mentor’s values?
Activity C: How strongly do you agree with the following statement? My values are aligned with my research mentor's values

(A) Strongly Agree  15%
(B) Agree  46%
(C) Neutral  15%
(D) Disagree  15%
The basic difference between an argument and a fight? You fight to win; you argue to achieve agreement...It's easier to change someone's mind than to change their values.

How they make decisions  How they communicate  How they organize themselves/their work  How they handle conflict and change

The Point? If your values are not aligned, you’re going to have to learn how to persuasively argue...
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

The Point? If your values are not aligned, you’re going to have to learn how to persuasively argue and how to engage in interest-based negotiation.

Youtube Video (the Art of Negotiation): bit.ly/Ury-Negotiation
The Inclusive Research Mentor/Manager Training (TRAIN-UP) is open for registration. To receive announcements about this series, join the OPCD listerv. We will be offering this series virtually via Zoom. To learn more about this course, see the module descriptions, dates, and times below.

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Module 1. Assess yourself: How inclusive are you at work / in the lab?

Many scientists with mentoring/managerial responsibilities have the best of intentions, but lack clarity about which specific decisions and actions result in their diverse team feeling a sense of belonging and invested in the overall success of the lab. In this session, you will learn a framework to benchmark which decisions, behaviors and actions define what it means to be inclusive as a mentor / manager. Secondly, we will outline the 5 overarching strategies that most inclusive efforts and best practices map to. Finally, you will practice applying these principles to your own work-life, by intentionally designing inclusivity into a common work responsibility (a 1:1 or lab meeting).

Module 2. Assess yourself: How ready are you to manage your mentee/employee’s productivity?

In this workshop, participants identify the skills they have, and those they need to develop, to effectively manage the productivity of their mentee/employee. Find out if your skills match your needs.
Assess, strategize and navigate…with integrity

Your Research Mentor’s Abilities
A research mentor is a special kind of mentor: A super mentor, with overlapping mentoring, educational and supervisory responsibilities.
What's the Problem?

**The Trainer (educator)**
- Teaching scientific knowledge
- Training on technical skills
- Developing scientific thinking
- Developing scientific leadership skills

**Role**
- Is responsible for
- Focused on
- Is responsible for

**The Supervisor (people manager)**
- Hiring, promoting, terminating
- Managing performance, behavior, and productivity
- Allocating resources, assigning projects
- Authorizing sharing of products & data

**The Mentor (the unfettered guide)**
- Career development
- Psycho-social support
- Personal, career, & professional development goals

**Research Mentor**
- A research mentor is a special kind of mentor: A super mentor, with overlapping mentoring, educational and supervisory responsibilities

Your Decisions

Paul wants to TA at a community college in the summer, but Bo needs them to complete key experiments related to their grant by early fall.
Role conflict and the research mentor

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  - Career development
  - Psycho-social support
  - Personal, career & professional development goals

- **The Supervisor (people manager)**
  - Your & the overall lab’s productivity goals
  - Managing performance, behavior & productivity
  - Allocating resources, assigning projects
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Paul is mentoring a promising undergraduate student Samir. Paul wants to support Samir, but Samir’s been struggling with his initial project.

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❖ A research mentor is a special kind of mentor: A super mentor, with overlapping mentoring, educational and supervisory responsibilities

- **Mentor Role**
  - Career development
  - Psycho-social support

- **Supervisor Role**
  - Teaching scientific knowledge
  - Training on technical skills
  - Developing scientific thinking
  - Developing scientific leadership skills

- **Research Mentor Role**
  - Personal, career & professional development goals

- **Trainer Role**
  - Focused on training goals
  - Is responsible for
    - Authorizing sharing of products & data
    - Managing performance, behavior & productivity
    - Allocating resources, assigning projects
    - Hiring, promoting, terminating

- **Your Decisions**
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Role conflict and the research mentor

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Role conflict and the research mentor

Q. What impact* do you think unmanaged role conflict can have on a research mentor? On a member of their lab?

(*Impact = on their productivity, morale and well-being)

A research mentor is a special kind of mentor: A super mentor, with overlapping mentoring, educational and supervisory responsibilities.
Break - 5 minutes
Role conflict and the research mentor

Our approach: Teach all 3 of the roles, and teach people how to manage role conflict using inclusive strategies

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Bo

Your Decisions

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Research mentors have people manager/(supervisory) responsibilities

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These are not individual tasks; it’s a protocol

Research mentors have people manager/(supervisory) responsibilities.
Assess your research mentor’s abilities as a people manager

Yes = 1pt
So-So = 2pt
No = 3 pt

Meeting expectations?

Recognize Progress & Reward Achievement

Articulate & Enforce Consequences/Responses Fairly

Manage conflict & change

Provide appropriate support & protection

Not meeting expectations?

Set Expectations
Take a baseline assessment

Teach/Train
Delegate Responsibility & Authority

Give Kudos, Corrective, & Evaluative Feedback

These are not individual tasks; it’s a protocol

Set expectations & Take baseline assessment

Teach/train & delegate effectively

Give kudos, corrective & evaluative feedback continuously

Recognize progress & reward achievement

Articulate & enforce consequences/responses fairly

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The point: You will probably need to proactively manage the gap

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What does it mean to be proactive?

• Consider your boundaries

• Find allies - additional colleagues, mentors and support systems - early and often.

• Negotiate when possible

• Proactive engagement: e.g. Structuring your asks for feedback
  • Using transparency and accountability tools
    • IDPs
    • Red flag boundaries setting

• Being strategic about goals – choose projects that give you collaborators

• Constantly assessing if you’re on track

7 Supervisory Responsibilities

1. Set expectations & Take baseline assessment
2. Teach/train & delegate effectively
3. Give kudos, corrective & evaluative feedback continuously
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Sign up for the UCSF-CCSF Inclusive Mentor-Manager Series in October!
Did you know there are three types of people at work?
Did you know there are three types of people in your lab?

**ENGAGED**
employees work with passion and feel a profound connection to their organization. They drive innovation and move the organization forward.

**NOT-ENGAGED**
employees are essentially ‘checked out’. They’re sleepwalking through their workday, putting time, but not energy or passion into their work.

**ACTIVELY DISENGAGED**
employees aren’t just unhappy at work; they’re busy acting out their unhappiness. Every day, these workers undermine what their engaged coworkers accomplish.

Gallup State of the American Worker Survey

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Activity F: Describe the impact on you if you are surrounded by engaged individuals? disengaged individuals?
Assessing the team you have…and finding the team you need
A Closer Look: the life cycle of a mentoring relationship

01 Identify
   1. Your goals
   2. Potential mentors/protégés

02 Connect
   1. Request/agree to start a professional relationship with your mentor/protégé

03 Establish your relationship with your mentor/protégé
   1. Share goals
   2. Establish engagement based on needs and preferences

04 Maintain your relationship with your mentor/protégé
   1. Give/receive feedback
   2. Recognize progress/achievements
   3. Offer/accept support

05 End your relationship with your mentor/protégé
   1. Celebrate progress/achievements
   2. Express gratitude
   3. Say goodbye

1. Your goals
2. Potential mentors/protégés
3. Request/agree to start a professional relationship with your mentor/protégé
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6. Recognize progress/achievements
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9. Express gratitude
10. Say goodbye
Multiple mentors and micro-mentorship: Do you have a circle of support?

1. **Research Support**
   People who are content experts and help you learn the knowledge and skills required to develop in your discipline.

2. **Career Support**
   People who offer guidance on how to position yourself to pursue and succeed in a particular career path.

3. **The Guide**
   People who show you the ropes in any new, complex or fraught setting or situation.

4. **The Inspiration**
   This is support from who has a specific skill or quality you wish to develop in yourself.

5. **The Friend/Fam/Therapist**
   People who know and appreciate you, your strengths and weaknesses, and see the best in you.

6. **The Sponsor**
   This person is specifically dedicated to your advancement. They advocate for you, make introductions and advise you on how to position yourself.
Building Inclusive Labs Initiative

Teach research mentors people manager skills

Inclusive Research Mentor/Manager Training

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REGISTER THROUGH EVENTBRITE

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In this workshop, participants identify the skills they have, and those they need to develop, to effectively measure the productivity of their mentors/employees. Find out how to evaluate your

Teach students and postdoc how to navigate professional relationships & academic/work spaces.

Workplace Navigation: The Strategic Student/Postdoc

Our goal is to teach every UCSF student and postdoc how to assess and skillfully navigate academic and employment spaces.

This series teaches strategic competencies, such as situational awareness, problem-solving, interest-based negotiation, backward-designing training and professional goals, positioning oneself, managing professional relationships, and navigating organizational politics.

Not sure where to start? Get a baseline! Everyone’s experience of mentorship is different but there are key aspects that everyone needs. Take our quiz to quantity how well your relationship with your research mentor is working, then learn how you can further support this important relationship.

Choose a topic below to learn more:

Assessing a Lab or Research Group
Understanding the environment you work in is critical to planning for success. Visit this page to learn how to assess your research mentor, your manager, and the level of inclusivity in your environment.

Joining a Lab or Research Group
Joining a new team is challenging and involves making major decisions that can have a large impact on how well you are set up for success. Visit this page for resources to choose a thesis lab and to set yourself up for success in the first 90 days.
Do you feel you can do your best work? If not, why not?
(e.g.: is it the organizational values? The relationships? Do you have what you need to do what is expected of you?)
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Abraham Maslow's Hierarchy of Needs (1943)
- Physiological
  - Basic survival needs such as feed and water
- Safety
  - Both physical (security, shelter, protection, law and order, health insurance, pension plans, secure job) and psychological freedom from fear and anxiety
- Belonging/Social Needs
  - Friends, affiliation, affection, relationships, love
- Self Esteem
  - Prestige, self-respect, competence, self confidence, sense of self worth
- Self Actualization
  - Achieving one's potential, being creative, serving a cause, contributing to society

Frederic Herzberg Theory of Motivation 1968
- Sense of personal achievement
- Advancement
- Growth
- Responsibility
- Stimulating work
- Self-Control (autonomy)
- Status
- Recognition
- Professional Relationships, Supervision
- (Safe) Work environment
- (Fair) Org. policies
- Job security
- Salary/benefits

(Your Organization
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When we’re underwater, it’s a little harder to maintain our productivity, morale and well being.

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- Hygiene Factors
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  - Salary/benefits
  - (Safe) Work environment
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  - Professional Relationships, Supervision
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That’s a lot of information. What does it look like when it – and you - are working?
Proactively mind and bridge the gap in your professional relationships

1. **Who Are You:** Articulate your values, define your reputation, and consider the ways you can live those values at work.

2. **How Do You Function:** How do you make decisions, communicate, organize, and handle conflict/change?

   - **You**
   - **Your PI/Boss**
   - **Your Organization**
   - **Your Team**

   1. **Do you feel you can do your best work? If not, why not?**
      (e.g.: is it the organizational values? The policies? Do you have what you need to do what is expected of you? Etc.)

   2. **Assess if they are playing their supervisory position:** are they completing their 7 responsibilities?

   3. **If you feel the relationship is less than optimally functional, build/seek out a circle of support as soon as possible.**

   1. **Who is engaged? Not engaged? Actively disengaged?**
   2. **Do they take pride or pleasure in their work?**
   3. **How do they interact with each other? How are they interacting with you?**
   4. **Who are your mentors/allies? Who is not and why?**
Engaging ethically in professional relationships is the combination of:

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   of your values, goals and preferences which shape your decisions, actions and behaviors.

2. **Curiosity about the other person**
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