

Management Bootcamp

Presented by OITE

June 2020



Departmental Administrative Assistant: Science Center

The College is pleased to announce an opening for an Administrative Assistant to the Science Center. The Assistant works with all members of the department on a wide range of administrative responsibilities. Primary duties include, but are not limited to, record and budget keeping, correspondence, visitor reception, phone coverage and event planning. Daily activities also include mail processing, scheduling use of facilities, maintenance of office equipment and supply inventory, processing invoices, purchase orders, and record keeping for summer student payroll, personnel and housing information.

The successful candidate must be able to balance many different tasks simultaneously, demonstrating excellent organizational and time management skills. A commitment to serving faculty, staff and students in a courteous, confidential and professional manner is essential. Knowledge of and experience with databases, word processing, email systems and networked scheduling software is essential; applicant should be able to undertake and/or be quickly trained in Web-design and maintenance. A minimum of five (5) years combined education and related professional experience is required.

Who would you hire?

- There were 125 applicants for the position. You received the resumes five days after the position closed. It took you two days to review all the applicants and select candidates with the most potential.
- You selected 12 candidates to interview over the phone. It took three weeks to arrange all the candidate interviews with the six-member interview team.
- The interview team interviewed the top four candidates in person. It took three weeks to coordinate on-site interviews of all the candidates.
- It takes three days to get everyone together to discuss the candidates. No one agrees on who should be hired.

1. Harry **Positives**

Harry has excellent web design and maintenance experience. These skills could really benefit the Science Center. He has an associate's degree in web design and IT from a local community college. Harry has stellar recommendations from professors who had taught him at the community college. He had evaluated the Science Center's Web site and brought exceptional ideas and a demo site to share with the group.

Negatives

Harry has limited work experience, especially in the area of client services and event planning. Interpersonal skills are good. He wore business casual attire to the interview. He has developed an impressive personal web page that highlights his blues band. Harry sent a group email thanking everyone for the interview.

2. Hermione

Positives

Hermione has twenty years of administrative experience at the university. She is familiar with the university regulations, software systems and has done 90% of the job's duties in previous positions. She was recently laid off. Her references are good but not glowing. She is extremely personable and the entire interview committee liked her personally. She really needs the job and would probably stay until she retires. A faculty member in her previous department (not her hiring manager) recommended her for the position.

Negatives

Her previous salary was \$10K higher than you are able to offer. You will need to offer her the position at the top end of the scale. She has limited database and web design experience. She has been unemployed for 9 months.

3. Hagrid

Positives

Hagrid is returning to the workforce now that his two children are both in middle school. Prior to being a stay at home Dad, he was an accountant with grants management experience for a health insurance firm. He has a BS from a prestigious university. He is dressed meticulously at the interview, reserved but very bright and a good conversationalist. He volunteers at his children's school on a regular basis and served as the treasurer for the school's PTA. He was recommended by a neighbor in response to your email advertising the position to your neighborhood HOA network. Hagrid followed up with hand written thank-you notes to each team member that interviewed him.

Negatives

No university experience or experience with faculty and undergraduates. No web design experience. He desires a work schedule from 7 to 3 to accommodate his children's schedule. Based upon his experience at the Health Insurance Firm, he is over qualified for the position.

4. Ron

Positives

In Ron's current position at a local accounting firm, he received an award for customer service. He has all the skill sets needed for the position. He has organized numerous successful fund raising events for his church. He wore a suit to the interview and looked like a million bucks. He has a BS in Sales and Marketing from a good liberal arts university. He is currently pursuing an MBA as an evening student. His resume defines a track record of success. He was recommended by one of your current staff. Ron is gregarious and dynamic. He sent a thank-you email to each team member.

Negatives

The team loved him but you did not click with Ron. He monopolized the interview. He has not worked in an academic setting. He did not know much about the Science Center's goals.

**STATEMENT OF WORK (SOW)
FOR
Career Counselor**

SCOPE.

Under this task order, the contractor will independently provide support services to satisfy the overall operational objectives of the Office of Intramural Training & Education (OITE), Office of Intramural Research, National Institutes of Health. The primary objectives are to provide outstanding career counseling services to the ~4000 young biomedical investigators currently receiving research training in the NIH Intramural Research Program. These services are integral to the NIH mission of using apprenticeships in the Intramural Research Program to train the next generation of outstanding biomedical researchers.

ORGANIZATION.

The National Institutes of Health is the primary Federal agency charged with responsibility for biomedical research. The NIH supports biomedical research carried out in university and institute laboratories, contributes to biomedical knowledge by conducting research in its intramural laboratories, fosters the training of biomedical researchers both in its own laboratories and extramurally, and facilitates the sharing and application of new biomedical information. The mission of the OITE is specifically to enhance the training of biomedical researchers that occurs in the Intramural Research Program by guaranteeing them professional and career development support.

TASKS/SERVICES. The contractor shall:

- Provide **one-on-one counseling sessions** dealing with a wide range of individual trainee needs including
 - Self-assessment aimed at identifying the most appropriate career options
 - Exploration of various career options
 - Communication coaching
 - Interviewing
 - Presenting and asserting oneself
 - Preparation of cover letters, resumes, and curricula vitae
 - The job search process(es)
 - Referrals to other staff in the OITE, the NIH Ombudsperson or Employee Assistance Program for assistance dealing with conflict or psychological issues
- Write both print and online content for the OITE including (but not limited to) articles, blog posts, and program synopsis
- Research, write, update, compile, organize, edit, and publish information on the OITE Career Services Center Web pages and other OITE Web pages as needed and with Section 508 compliance

- Manage and write the OITE Careers Blog (<http://oitecareersblog.wordpress.com/>)
- Develop best practices to integrate social media systems for the OITE. Research and implement emerging social media platforms within government guidelines
- Manage the OITE LinkedIn and Twitter accounts
- Enhance the use and utility of the NIH alumni database
- Provide input on potential additions to the OITE Web presence
- Provide editing expertise for OITE articles and newsletters
- Provide input regarding OITE Jobs, Fellowships, and Opportunities postings
- Assist in the development of new marketing strategies to utilize all available methods of directing traffic to the OITE website and content
- Contribute to further development/expansion of the OITE Career Libraries
- Contribute to the organization and implementation of major OITE career events
- Travel to branch campuses to provide one-on-one career counseling and career development workshops.

We expect that this position will be 60% individual career counseling appointments and 40% writing and managing social media content and strategy.

CERTIFICATIONS, LICENSE, PHYSICAL REQUIREMENTS OR OTHER EXPERIENCE REQUIRED. The contractor must have

- Successful experience providing career counseling, with an emphasis on the careers in the sciences, for undergraduates, graduate students and postdoctoral fellows at a major university, research institute, or professional society
- First-hand knowledge of major issues in career counseling and in the scientific workforce nationwide
- Experience addressing the needs of undergraduates, graduate students and postdoctoral trainees in areas including self-assessment, career planning, and effective communication
- Expertise in providing career information and counseling to both individual trainees and large groups
- Experience in addressing the specific career needs of minority and international trainees
- Experience with wellness counseling
- Experience planning large events, *e.g.*, career fairs
- Outstanding communication skills, including the ability to write clearly and persuasively
- Ability to write articles on defined timelines
- Experience managing or contributing to a Web site, including expertise in the use of content management software
- Understanding of social media platforms and how to utilize them effectively in a career counseling center
- The ability to work independently
- Strong interpersonal skills and a collaborative work style
- Flexibility and demonstrated ability to manage competing demands

Advertizing:
Chronicle:\$285
NACE/jobwire: \$225
HigherEdjobs: \$195
Send to grad career consortium
Higher Ed jobs
Victoria Blogett, Bill, Melanie, Laura (Harvard), Naledi, Cynthia Furman, Maryland guy,
Hopkins guy, Dara Wilson Grant, Katybeth lee, joe testani

Career Counselors

National Institutes of Health Office of Intramural Training & Education

The Office of Intramural Training & Education (OITE) of the National Institutes of Health (NIH) is seeking an individual to join the Career Services Center to provide career counseling services for the more than 4000 summer interns, postbacs, graduate students, postdoctoral fellows, and clinical fellows conducting biomedical research in the NIH Intramural Research Program. The Career Counselor will be based in the OITE on the main NIH campus in Bethesda, MD. They will be responsible for providing one-on-one counseling to address trainee needs in areas such as self-assessment, exploration of career options, and the job search process; traveling to NIH branch campuses to provide services; writing career content for the website and blog, and to manage our social media platforms. We expect that this position will be 60% individual career counseling appointments and 40% writing and managing social media content and strategy.

The career counselor will report directly to the Director of the Career Services Center in the OITE. Salary will be commensurate with experience.

Applicants must possess (1) experience providing career services to trainees in biomedical sciences (such as summer interns, postbacs, graduate students, postdoctoral fellows, and clinical fellows); (2) expertise in administering and interpreting career inventories and assessments; (3) knowledge of issues influencing the scientific workforce and career counseling nationwide; (4) ability to interact successfully with individuals and groups; (5) experience in addressing the specific needs of minority and international trainees; (6) experience in writing career content; (7) fluency in social media platforms (including Twitter and LinkedIn); (8) outstanding communications skills and the ability to work independently. An advanced degree in Career Counseling or the equivalent is preferred, but job expertise can come from a variety of experiences.

Please send applications as one PDF document including: statement of interest, résumé, writing sample and the names and contact information for three references, to Dr. Lori Conlan, OITE, Conlanlo@mail.nih.gov. Consideration of applications will begin immediately and continue until the positions are filled.

To make it past resume screen

Are they a career counselor with qualifications like MBTI/Strong or equivalent?

If an advisor, not a counselor, do they have the creds?

Do they show an understanding of STEM career challenges?

Do they look like they know what the OITE is?

Does their writing sample pass muster?

Do they have social media experience?

Phone-Interview Questions Career Counselor/Advisor 2016

Thank you for interviewing with us today for the career counselor/advisor position in the OITE at the NIH. The OITE serves the career needs of all trainees in the intramural research program at the NIH. The intramural research program is science that happens on NIH campuses, which are in Bethesda, Frederick, Baltimore, RTP/NC, and in Hamilton, Montana. There are appx. 5000 trainees in our population. Our mission is to prepare these trainees for their career needs, both in career exploration and skill development. We host in-person workshops, day-long symposiums, online seminars, an active LinkedIn group, a blog, and a myriad of online resources on our website.

The OITE is an office of ~20 people, broken down into groups that serve specific populations. This specific position is in the Career Services Center, which spans across all of the trainee groups. Right now the Career Services Center is staffed by a career counselor, pre-prof advisors, and wellness counselors (and managed by the Director of the Career Services Center). But, the entire OITE staff also does career advising. This position is 40% writing and 60% counseling, so we will be asking questions for both of these components.

Tell us about yourself.

What interests you about this position?

Based on what you know about OITE, why is this position a good fit for you? (want to hear that they know what our office is)

Writing:

Tell me about your writing experience, specifically around career content.

How much editing does your material need?

Tell me about your experiences with social media, such as LinkedIn, Twitter and Blogs.

I imagine you have looked at our online material, what do you see as our strengths and weaknesses? How would you propose to make our content better?

Counseling:

Our population consists of trainees at various levels in their careers; summer interns (~800), postbacs (~600), grad students (~500), postdocs (~3000), clinical fellows (~400). Can you tell me what you think are some career issues that are relevant to each of these populations?

What do you see as the differences and similarities b/t career counseling and counseling?

How do you manage when a client's career expectations do not meet reality? For example a postbac did not get into medical school or a postdoc is not a candidate for a faculty position.

Can you give us an example of a time when a clients cultural background influenced the way you counseled someone. For example, you have an international trainee who is concerned about how to navigate the US research system. Or a first-generation college student is trying to navigate career choices.

What have you done to highlight the importance of networking, and how would you teach that?

Are you able to regularly travel to Baltimore and Frederick?

Do you any questions for us?

In-person- Round 2 questions:

1. Tell us about the scope of your counseling experience (background of the students/trainees and issues they have dealt with)
2. Think about a post-bac who is trying to decide between medical school or a PhD in science? How would you help him/her with this decision?
3. For a post-doc who has worked mainly at the bench but is not sure about academia as a career path, what do you know about the academic research career path in the sciences that is important for him/her to know? What do you know about science career options in industry, govt, non-profits?
4. Tell us about a challenging client/student you have worked with and your approach to helping that person
5. Tell us about your comfort level with anxiety/depression/serious life issues and how those influence job searches. What would you do?
6. Where would you like to see the blog go?
7. We have been building an online social media presence, but have yet to engage our readers as effectively as we would like. How would you encourage an interactive online community?
8. How do you see this position fitting into your overall career goals.
9. Having explored our website, talking to us, and learning aspects about our community, what would be your overall vision for the future for the Career Services Center?
10. Do you have an example of a time when you simply blew it? We all make mistakes. What is an example where this happened for you? What was the mistake, what did you do, and what was the outcome?
11. Please tell us about a time that you had a strong disagreement with a direct report. What was the situation, how did you handle it, and what were the results?
12. Describe the work environment or culture in which you are most productive and happy.

13. Describe the management style that will bring forth your best work and efforts.
14. What is the single most important factor that must be present in your work environment for you to be successfully and happily employed? Now that you have answered that question, what were two others that you debated about before giving the response that you chose?
15. Tell me about a recent book or article that you have read in the career development realm. What did you like/hate about the writing?

Effective Communication Styles Inventory

Scoring Form A

DIRECTIONS: Print and complete this scoring form to determine your communication style.

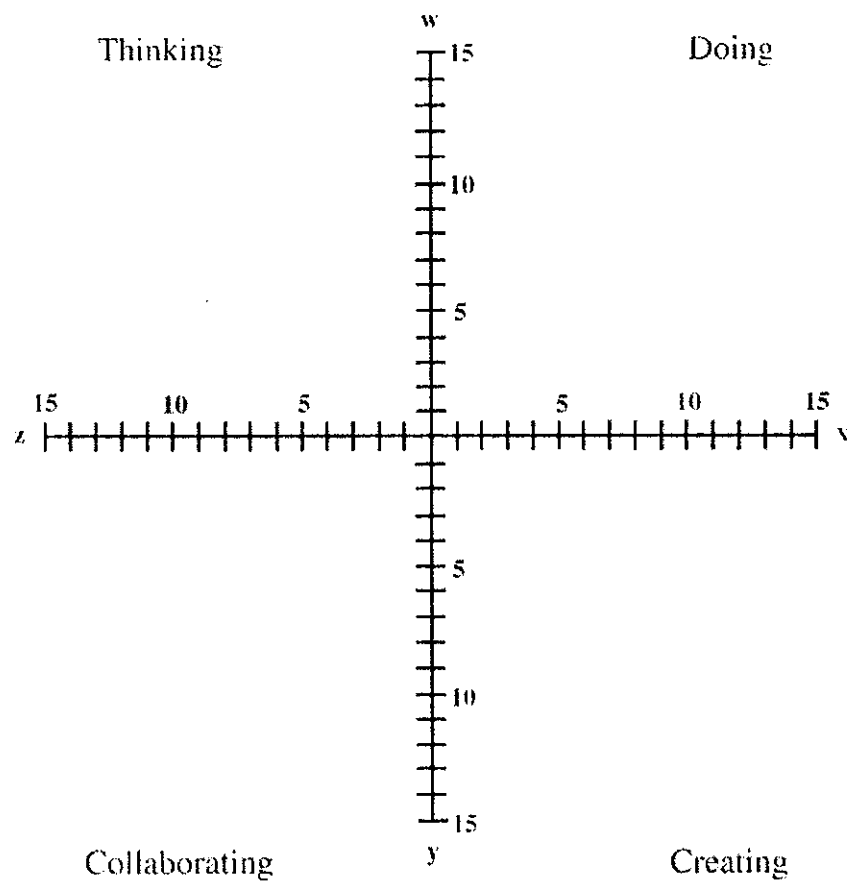
1. Reflect on your personal characteristics as you read across each of the 15 lines below and circle two descriptive words that best describe you on each line. This is a forced choice, so sometimes all four words will describe you, but you **MUST** select only two. Sometime none of the four words "best" describes you, however, you **MUST** select two words on each line.
2. After completing line 15, count the number of words circled on each line, (as you read across from left to right) there must only be 2 words circled on each line.
3. In each column (x, z, w, and y), count the number of words circled and indicate the "total" circled in the box provided.
4. Your "total" scores for each column represent four "points" (w, x, y, z), take these four points and graph them on the scoring grid which follows. When plotting your points, remember zero is in the middle of the graph no matter which direction you are plotting (left, right, up, or down).
5. Draw a four sided figure to connect the four points (in other words when you connect your four points they **MUST** make a square, rectangle, in other words a four sided figure. **DO NOT DRAW A KITE.** The largest area (length x width) of the four sided figure drawn represents your dominant communication style as indicated by the words you selected. If you disagree about your style, go back and review the words you selected.
6. Read the summary page for information about your style.

X	Z	W	Y
1. disputes the issue	unruffled	focused	sociable
2. will take a chance	flexible	rational	sympathetic
3. spur-of-the-moment	prudent	composed	extraverted
4. directs others	asks	pensive	lively
5. decisive	ponders	diligent	gregarious
6. takes control	collaborates	independent	amicable
7. self-assured	noncommittal	orderly	demonstrative
8. convincing	open-minded	thorough	free-thinking
9. will fight for	will defend	effective	good-hearted
10. wants to win	hopeful	pragmatic	young-at-heart
11. eager	diplomatic	systematic	innovative
12. confident	accepting	pains taking	high-strung
13. dominant	mild	plans	talkative
14. insistent	sensible	exact	helpful
15. urgent	constant	conventional	good-natured

=30

Scoring Grid

Effective Communication Styles Scoring Grid



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Effective Communication Styles Inventory *Summary*

THINKING/PLANNING

ASK FOR:

- * data
- * information
- * facts

FOCUSED ON:

- * process
- * task
- * goal
- * doing things the right way

UNDER STRESS:

- * avoid

NEED/Like:

- | | |
|--------------------|---------------------|
| * logical thinking | * rational approach |
| * documentation | * careful planning |

SUPPORTING/COLLABORATING

ASK FOR:

- * information re: others' skills/interests
- * input
- * feedback

FOCUSED ON:

- * people
- * relationships
- * collaborations
- * how situations "feel"

UNDER STRESS:

- * acquiesce or yield

NEED/Like:

- | | |
|-----------------|---------------|
| * friendliness | * inclusion |
| * participation | * involvement |

DOING/DIRECTING

TELL ABOUT:

- * progress to goals
- * actions required
- * solutions to problems

FOCUSED ON:

- * task
- * goal
- * winning/being successful
- * making things happen

UNDER STRESS:

- * become autocratic and tell

NEED/Like:

- | | |
|---------------|---------------|
| * options | * directness |
| * flexibility | * conciseness |

VISIONING/CREATING

TELL:

- * visions
- * ideas
- * stories, analogies

FOCUSED ON:

- * big picture
- * models/theories/concepts
- * bringing visions into reality

UNDER STRESS:

- * blame others

NEED/Like:

- * to understand how the details fit their picture
- * innovation and creativity
- * others to handle the details

What communication style(s) is easiest for you to use?

What communication style(s) is hardest for you to use? Why?

What communication style(s) are hardest for you to respond/deal with? Why?

What is one thing you will do to improve your communication this summer?

OITE Management Bootcamp

1. Write out an SBI outline to help you to approach this conflict. One of you pick to approach the individual in the scenarios, one of you pick to approach the staff.
2. Practice having the conversation with a partner (where your partner is the individual or the staff receiving the feedback). (Partner should note your use of constructive vs destructive and active/passive methods of approaching conflict.)
3. Practice the conversation for the individual problem for 10 minutes, then switch to practice the conversation with the staff problem for 10 minutes.

TEAM 1:

Your staff is having some problems. There is one person whose skills need development. You see potential in the person, but it is true that they are not up to the level of the rest of your staff. This is causing friction, with grumblings that this person does not belong and causing a morale issue with the staff. How do you work with a) the staffer with the problem, and b) the rest of your staff?

TEAM 2:

One of your staff has some personal items that have pulled his attention away from work. He is no longer participating in group tasks that everyone needs to do, he no longer helps in the strategic thinking in the group and he is "silo-ed" into his own work. The rest of the staff are sympathetic to the person's problem, but are starting to feel like they have to pick up his slack and are becoming resentful. They do not trust him, and are starting to not even ask his opinion (and this staffer has noticed and is starting to complain). The staff also feels he is getting special privileges from you. How do you work with a) the staffer with the problem, and b) the rest of your staff?

TEAM 3:

Your staff is having a general conflict issue about little things in the group, like common areas not getting cleaned up. One staffer continually tries to get you to solve all of their problems with the group, without ever trying to address the problem themselves. The rest of the staff is apathetic to the complaints (they feel that this person complains about everything to you) and do not take the complaints nor any responsibility seriously. How do you work with a) the staffer with the complaints, and b) the rest of your staff?

TEAM 4:

One of your staff is a terrific team player and is always willing to help the rest of the crew. However, this interferes with their ability to get their priority work done. They have missed deadlines and dropped projects, but on the flip side have done tasks that are needed to keep your group running. How do you work with a) the staffer with the problem, and b) the rest of your staff?

WELCOME to the K Research Group, NIH!

The goal of our research group is to develop an efficient and highly productive clinical research group focusing on XX research. This requires a concerted team effort from a diverse group of individuals.

The purpose of this document is to communicate important information regarding the research group. Although I believe that everything in this document may be applicable to you, some things may apply more or less to you than to others, i.e., to different degrees. As you read through this, please keep in mind that it was prepared to be directed to a group of individuals with a wide variety of backgrounds and training.

In general, I'm a "hands-on" person. I will give more freedom as I sense your comfort level, reliability, and expertise with a particular responsibility.

FELLOWS/TRAINEES: The foremost objective of the fellows program is to provide scientific training while you contribute to the goals of our research program and advance your career. In addition to learning how to perform clinical and translational research, an important goal for you should be to develop excellent communication skills that will promote your advancement within biomedical science. This involves becoming a contributor who can present his/her own work, and a listener who can offer and accept constructive criticism. Thus, participation in lab meetings, seminars, and abstract and manuscript preparation, as well as journal and manuscript reviews will constitute an important part of your training. This communication provides you with guidance as to what will be expected of you—and what you can expect—during your time here. Meeting this challenge should provide you with a good foundation towards your research career.

EMPLOYEES: You form the central core of this research group, which strives to maintain its position in excellence in research. Your contributions are vital to the success of our group and serve as the continuity for this research program year after year. In addition to promoting this group's research goals, an important goal for you should be to continue your professional development. I encourage to think about what your professional development goals are and to discuss them with me. Toward this goal, I am supportive of your identifying opportunities to enhance your professional development as long as they promote rather than detract from the primary purpose of our research group.

CONDUCT OF RESEARCH

You are expected to maintain the highest level of scientific integrity. Formal discussions of ethics related to scientific issues occur in a group meeting format annually; your attendance is mandatory. Honestly, constructive criticism, and responsibility are expected of you and your coworkers, and you should know what to do or who to contact if something goes wrong. You may find such information in "Guidelines for the Conduct of Research in the Intramural Program at NIH" (<http://www.nih.gov/campus/news/guidelines.htm>) that discusses such things as: Responsibilities of Research Supervisors and Trainees, Data Management, Publication Practices, Authorship, Peer Review and Privileged Information, Collaborations and Financial Conflicts of Interest. This is a general but useful source of information and is required reading. In general, if something goes wrong, go to your supervisor (me) first, or another Branch PI, or the Branch Chief.

Please remember that research protocols and details associated with the protocols can be considered intellectual property. This information should not be shared with others unless you have obtained my approval. I have seen protocols accidentally routed to a competitor. Please treat protocol material and especially patient material as confidential.

In addition to conducting research in an ethical manner, your safety is also very important. Please follow the standard safety guidelines for patient care and laboratory areas. Along these lines, open-toed shoes are not allowed in areas that have sharps or potentially hazardous materials.

EXPECTATIONS OF WORK HABITS, THE QUANTITY AND QUALITY OF TIME

In addition to providing training, our Research Group is responsible for maintaining a competitive clinical research program whose progress will be monitored regularly and funded according to its productivity. Everyone's efforts are of paramount importance to our success.

You are expected to spend your time performing protocol-related work, evaluating patients, and evaluating or discussing data in a professional manner. If you aren't busy, you may be distracting others. If you plan to be away, you are responsible for notifying me in advance. I believe in a positive cohesive working environment.

- My core work hours are 8:15-5pm. I prefer that your schedule overlap with mine as much as possible, because this increases opportunities for us to communicate. I expect that individuals are present between most of the core hours of 8:30am-5pm.
- I typically go "off-line" until ~9pm. I am often working from 9-11:30pm.
- If I don't respond to an e-mail readily, I am available by phone. Please check my schedule to ensure that I'm not with a patient or in a meeting.
- I can be available on the weekend. If you need a response to an issue over the weekend, please let me know in advance. I want to ensure that I am able to respond in a timely manner.
- During the week, I am accessible in person and via e-mail and pager. I generally respond to an e-mail within a day. Please feel free to re-send your e-mail again if you haven't had a response in 1-2 days. At times, I may be conducting some research to better answer your question.

Please ask if you want to meet with me or need my help. I often accomplish much work outside of traditional work hours and I will be enthusiastically supportive to see you do the same. Use your time well, work efficiently, put in productive hours; strong efforts on your part will be noted most positively.

STAFF/LAB MEETINGS

- Weekly clinic staff meetings are on Mondays at 9am in the conference room. This meeting reviews topics related to clinic operations, Grand Rounds (2nd and 4th weeks of each month), attending coverage, vacations, conferences, rotating residents, etc. The clinic nurses will draft the agenda and should be notified if topics need to be added to the agenda.
- The Clinical Research meetings (clinical research group and our main collaborator) are on Mondays beginning at approximately 9:30am in the conference room (Will take place after data meeting on those specific Mondays). We review recruiting, protocol/regulatory, sampling, and goals for the clinical protocols. One of the research nurses drafts the agenda.
- The data meeting is a Monday 9:45am meeting with the data managers from the contractor who supports our data management needs and occurs twice a month. The data meeting examines progress of data inputting, adverse events, etc.
- Our lab meetings are on Mondays at approximately 10am for fellows/trainees to discuss progress of laboratory/research data and analyses.

- Fellows are expected to attend our collaborator's lab meeting every other Tuesday at 1 PM in the fourth floor conference room. The lab meeting lasts approximately 1.5 hours and takes place year round. This is an informal meeting when each postdoc/fellow in both groups presents their work/progress/challenges. There is opportunity to discuss analyzed data, to visualize the central findings, etc. This is a private meeting and all topics discussed are considered confidential.
- There is a Branch Talk when branch fellows are expected to present current progress on research projects. This occurs after Grand Rounds at 10am.
- Grand Rounds typically occurs on the 2nd and 4th Thursday of the month. Patient viewing is from 8-9am in the clinic and the presentations/discussion are from 9-10am. Since there is patient viewing, professional attire is required.
- There is an annual mandatory "All-Hands" meeting for Branch members to discuss any issues relevant to the entire Branch.

JOURNAL CLUBS

- The Branch weekly basic science journal club is held Fridays at 8:10am. Each Branch PI, fellow, rotating resident, student, and lab tech will present one article for discussion each Friday on a rotating basis.
- Clinical Journal club is held on the last Wednesday of each month. Two articles are presented each time. Branch PIs, PAs/NPs, clinical fellows, lab fellows, rotating residents and students are expected to attend and participate in the rotating roster of presenters. Research nurses are encouraged to attend and can opt to participate in the roster of presenters.

LEAVE

It is expected that all leave requests must be approved. Before you make travel plans, please discuss this with me. I place quality patient care as a high priority, and we must, therefore, ensure that a plan for proper coverage of potential patient care issues is in place. All MDs in the branch will rotate holiday coverage, and the branch clinical research nurses will also rotate holiday coverage outside of the federal holidays.

PROFESSIONALISM/E-MAIL ETIQUETTE

I strongly believe in professional behavior in the workplace, including appropriate attire for the workplace. Professional attire is expected in patient-care areas; casual attire including jeans, flip-flops, etc. are not appropriate for patient-care areas. Professional attire conveys respect for the patients. All individuals—from cleaning personnel to institute directors—deserve respect. I support an environment where individuals feel able to perform their work activities to the best of their abilities. If you ever feel that there has been disrespect directed at you, please come talk to me.

I expect a response to my e-mails in a timely manner (approximately 1 day). Even if you do not have an answer to my question, I would like an estimated time that you might have an answer. Please use e-mail professionally. Be aware that sometimes individuals may be bcc'd or that sometimes we accidentally hit "Reply to all" vs "Reply."

Turn on your out-of-office automatic response if you are sick/on vacation and do not plan to respond to e-mail. When you use your out of office notification, please designate who is covering and include their contact information in your automatic reply.

EVALUATIONS

I evaluate all research group members every 6 months. Additional evaluation on a formal or informal basis can be performed on a quarterly basis if requested by either party. Fellows are expected to function with increasing independence over time, and to assume additional responsibility for our work. Increased independence should never be confused with a lack of accountability. Everyone must be accountable, always.

You should be aware that I am often asked to evaluate people before and after they leave our group, specifically by potential employers and fund-granting agencies. It is not uncommon to be asked to rank a candidate in several categories. A typical "Reference Report Form" includes:

- Knowledge in the chosen field
- Motivation and perseverance toward goals including "work ethic"
- Ability to work independently
- Ability to work as a member of a research team
- Ability to plan and conduct research
- Ability in oral expression
- Ability in written expression
- Imagination and probable creativity
- Communication skills.

They also ask for ranking, i.e., top 2%, top 5%, top 10%, top 25% of fellows, etc. It is helpful to keep these items, and your responsibilities, in mind during your training, and always to conduct yourself as professionally as possible.

MONEY AND PROPERTY

Most items that require purchasing must be submitted through the online POTS (Purchase Order Tracking System) system. The branch purchasing agent works offsite but is available by e-mail (and sometimes phone). All purchases will be routed to me for approval. Do not pay for things personally and expect to be paid back. There is no "petty cash" option with the government.

You cannot take a computer or other device (projector) off campus without an issued property pass.

ATTENDING OUTSIDE MEETINGS is important, not only to hear recent developments before their publication, but also to allow others to get to know you and your work. I am happy to use funds to support travel for fellows who have submitted an abstract to FARE (see below, win or lose; however, FARE recipients get additional free travel money), on condition that you submit an abstract for talk or poster presentation at the meeting. This usually involves submitting an abstract describing the work to be presented to the meeting coordinators at the time of registration. I encourage employees to consider attending a meeting each year for professional development.

Travel while you are paid by the government is NOT easy. Several details will require your attention as soon as possible.

- You must start by discussing potential meetings with me.
- After obtaining approval, there are several items that need to be addressed in a timely manner:
 - Travel order (you will need the help of the Branch admin who will want the travel dates, hotel reservation, meeting information)
 - Flight reservation: Federal employees are limited in annual leave taken in conjunction with your travels. For international travel, there are minor variations and also requirements for a government-issued passport.

- o Meeting/conference registration: Do not pay for any meeting registration out-of-pocket. The branch purchasing agent processes payment for registration after the order is placed in POTS.
- o Hotel: The exception to paying out-of-pocket is hotel costs for outside meetings/conferences. Be aware of the per diem for the city you are traveling to. There is a limit to what the government will pay for a hotel in each city. If you book a hotel that is more expensive than the per diem rate, you will pay the remainder out-of-pocket. PLEASE keep receipts and you will be reimbursed after your return and after you submit the appropriate paperwork to the branch admin.

CHARTING AND NOTEBOOK/RECORD KEEPING

Proper and thorough charting/record keeping is vital to effective and efficient research. Patient notes should be submitted within 24 hours. Lab notebooks are expected to be organized. I am supportive of team members using their own system of organization as long as notes can be easily found and referenced.

AUTHORSHIP & COLLABORATIONS

If you are submitting an abstract for a meeting, please send it to me at least 2 weeks in advance for approval. If it's an abstract that you've submitted previously, please still let me know. Sometimes there are authorship or other considerations based on who else is attending the meeting. When you make a significant intellectual or experimental contribution to a project, then you will typically be an author on the manuscript. However, there have often been considerable resources devoted to a project before you ever receive the samples/data to analyze (e.g.; development of an IRB approved protocol, recruitment of patients). Even if others do not contribute a figure to a paper, they may also deserve authorship. Authorship (including order of authors) is always discussed before a manuscript is submitted from the lab.

Before you enter into collaboration with a member from another research group, speak with me first and certainly refer the potential collaborator to me. Although it is not required that you speak with me before you make a request of others, I prefer that you send me a draft of the request before you send it to the outside researcher. Requests by others for materials/information from our group must be discussed with me before they are distributed. If there is a misunderstanding or a conflict with a collaborator – talk to me. Remember that the lab may have multiple interactions with this lab or individual who may be affected. We may also have a history with this individual that helps to explain what you perceive to be an odd response.

I believe in an open-door policy. I encourage you to always feel free to come to me with any concerns or questions.

Thanks,

K

Entering Career Counselor Expectations from Lou

Counseling Priorities

- Familiarize yourself with the biomed population
 - Issues for grad/postdoc/postbac/summer
 - ScienceCareers.org
 - Books (Alt careers, non-traditional careers, careers in biotech and pharma, at the helm)
- Chat with Anne, Brad and Bill (maybe Denise?)
- When would you feel comfortable taking appointments?
 - How many? How long for each appt? Writing days vs. people days?
 - Julie has a few priority people
- Discuss travelling to Baltimore and Frederick
 - Lunch Bunch sessions?

Writing Priorities

- Research, write, update, compile, organize, edit, and publish information on the OITE Career Services Center Web pages and other OITE web pages as needed
 - Create new resume and CV examples and instructions for multiple career paths
 - Create cover letter examples
- Write both print and online content for the OITE including (but not limited to) articles, blog posts, and program synopsis
 - Bi-monthly catalyst article
- Manage and write the OITE Careers Blog (<http://oitecareersblog.wordpress.com/>)
 - Can include developing and hosting online chats with alumni (CoverIt live technology)
- Assist in the development of new marketing strategies to utilize all available methods of directing traffic to the OITE website and content
- (possible) Write book reviews of books our fellows should know about

Tier 2 Items

- Develop best practices to integrate social media systems for the OITE. Research and implement emerging social media platforms within government guidelines.
- Manage the OITE LinkedIn, Twitter and Facebook accounts.
- Develop and manage web-based platforms for program delivery (such as web-meetings)
 - How do we use things like adobe connect
- Provide editing expertise for OITE articles and newsletters
- Ensure that online content meets 508 compliance standards
- Provide input regarding OITE Jobs, Fellowships, and Opportunities postings
- Need videos and scripts for various topics (such as a team dynamics, communication styles, etc)
- Write quarterly emails for the new OITE-info listserv (a list of people not at the NIH but who are interested in our trainings and/or services)
- Articulate presenter software to deliver web content. We have a license but it has

challenges. 1. Does not play well with Macs, 2. You have to have a written record for 508 compliance, do we develop scripts or is there some voice recognition to text technology that we can use.

Sample Compact from Laboratory of Dr. Trina McMahon for Graduate Students, University of Wisconsin-Madison

Mentor-Mentee Contract

The broad goals of my research program

As part of my job as a professor, I am expected to write grants and initiate research that will make tangible contributions to science, the academic community, and to society. You will be helping me carry out this research. It is imperative that we carry out good scientific method, and conduct ourselves in an ethical way. We must always keep in mind that the ultimate goal of our research is publication in scientific journals. Dissemination of the knowledge we gain is critical to the advancement of our field. I also value outreach and informal science education, both in the classroom and while engaging with the public. I expect you to participate in this component of our lab mission while you are part of the lab group.

What I expect from you

Another part of my job as a professor is to train and advise students. I must contribute to your professional development and progress in your degree. I will help you set goals and hopefully achieve them. However, I cannot do the work for you. In general, I expect you to:

- ▶ Learn how to plan, design, and conduct high quality scientific research
- ▶ Learn how to present and document your scientific findings
- ▶ Be honest, ethical, and enthusiastic
- ▶ Be engaged within the research group and at least two programs on campus
- ▶ Treat your lab mates, lab funds, equipment, and microbes with respect
- ▶ Take advantage of professional development opportunities
- ▶ Obtain your degree
- ▶ Work hard—don't give up!

You will take ownership over your educational experience

- ✓ **Acknowledge that you have the primary responsibility for the successful completion of your degree.** This includes commitment to your work in classrooms and the laboratory. You should maintain a high level of professionalism, self-motivation, engagement, scientific curiosity, and ethical standards.
- ✓ **Ensure that you meet regularly with me and provide me with updates on the progress and results of your activities and experiments.** Make sure that you also use this time to communicate new ideas that you have about your work and challenges that you are facing. Remember: I cannot address or advise about issues that you do not bring to my attention.
- ✓ **Be knowledgeable of the policies, deadlines, and requirements of the graduate program, the graduate school, and the university.** Comply with all institutional policies, including academic program milestones, laboratory practices, and rules related to chemical safety, biosafety, and fieldwork.
- ✓ **Actively cultivate your professional development.** UW-Madison has outstanding resources in place to support professional development for students. I expect you to take full advantage of these resources, since part of becoming a successful engineer or scientist involves more than just

doing academic research. You are expected to make continued progress in your development as a teacher, as an ambassador to the general public representing the University and your discipline, with respect to your networking skills, and as an engaged member of broader professional organizations. The Graduate School has a regular seminar series related to professional development. The Delta Program offers formalized training in the integration of research, teaching, and learning. All graduate degree programs require attendance at a weekly seminar. Various organizations on campus engage in science outreach and informal education activities. Attendance at conferences and workshops will also provide professional development opportunities. When you attend a conference, I expect you to seek out these opportunities to make the most of your attendance. You should become a member of one or more professional societies such as the Water Environment Federation, the American Society for Microbiology, or the American Society for Limnology and Oceanography.

You will be a team player

- ✓ **Attend and actively participate in all group meetings, as well as seminars that are part of your educational program.** Participation in group meetings does not mean only presenting your own work, but providing support to others in the lab through shared insight. You should refrain from using your computer, Blackberry, or iPhone during research meetings. Even if you are using the device to augment the discussion, it is disrespectful to the larger group to have your attention distracted by the device. Do your part to create a climate of engagement and mutual respect.
- ✓ **Strive to be the very best lab citizen.** Take part in shared laboratory responsibilities and use laboratory resources carefully and frugally. Maintain a safe and clean laboratory space where data and research participant confidentiality are protected. Be respectful, tolerant of, and work collegially with all laboratory colleagues: respect individual differences in values, personalities, work styles, and theoretical perspectives.
- ✓ **Be a good collaborator.** Engage in collaborations within and beyond our lab group. Collaborations are more than just publishing papers together. They demand effective and frequent communication, mutual respect, trust, and shared goals. Effective collaboration is an extremely important component of the mission of our lab.
- ✓ **Leave no trace.** As part of our collaborations with the Center for Limnology and other research groups, you will often be using equipment that does not belong to our lab. I ask that you respect this equipment and treat it even more carefully than our own equipment. Always return it as soon as possible in the same condition you found it. If something breaks, tell me right away so that we can arrange to fix or replace it. Don't panic over broken equipment. Mistakes happen. But it is not acceptable to return something broken or damaged without taking the steps necessary to fix it.
- ✓ **Acknowledge the efforts of collaborators.** This includes other members of the lab as well as those outside the lab. Don't forget important individuals like Dave Harring at the CFL and Jackie Cooper at CEE.

You will develop strong research skills

- ✓ **Take advantage of your opportunity to work at a world-class university by developing and refining stellar research skills.** I expect that you will learn how to plan, design, and conduct high quality scientific research.
- ✓ **Challenge yourself by presenting your work at meetings and seminars as early as you can and by preparing scientific articles that effectively present your work to others in the field.** The

'currency' in science is published papers, they drive a lot of what we do and because our lab is supported by taxpayer dollars we have an obligation to complete and disseminate our findings. I will push you to publish your research as you move through your training program, not only at the end. Students pursuing a Masters degree will be expected to author or make major contributions to at least one journal paper submission. Students pursuing a doctoral degree will be expected to be lead author on at least two journal papers submissions, preferably three or four.

- ✓ **Keep up with the literature so that you can have a hand in guiding your own research.** Block at least one hour per week to peruse current tables of contents for journals or do literature searches. Participate in journal clubs. Better yet, organize one!
- ✓ **Maintain detailed, organized, and accurate laboratory records.** Be aware that your notes, records and all tangible research data are my property as the lab director. When you leave the lab, I encourage you to take copies of your data with you. But one full set of all data must stay in the lab, with appropriate and accessible documentation. Regularly backup your computer data to the Bacteriology Elizabeth McCoy server (see the wiki for more instructions).
- ✓ **Be responsive to advice and constructive criticism.** The feedback you get from me, your colleagues, your committee members, and your course instructors is intended to improve your scientific work.

You will work to meet deadlines

- ✓ **Strive to meet deadlines: this is the only way to manage your progress.** Deadlines can be managed in a number of ways, but I expect you to work your best to maintain these goals. We will establish mutually agreed upon deadlines for each phase of your work during one-on-one meetings at the beginning of each term. For graduate students, there is to be a balance between time spent in class and time spent on research and perhaps on outreach or teaching. As long as you are meeting expectations, you can largely set your own schedule. It is your responsibility to talk with me if you are having difficulty completing your work and I will consider your progress unsatisfactory if I need to follow-up with you about completion of your lab or coursework.
- ✓ **Be mindful of the constraints on my time.** When we set a deadline, I will block off time to read and respond to your work. If I do not receive your materials, I will move your project to the end of my queue. Allow a minimum of one week prior to submission deadlines for me to read and respond to short materials such as conference abstracts and three weeks for me to work on manuscripts or grant proposals. Please do not assume I can read materials within a day or two, especially when I am traveling.

You will communicate clearly

- ✓ **Remember that all of us are "new" at various points in our careers.** If you feel uncertain, overwhelmed, or want additional support, please overtly ask for it. I welcome these conversations and view them as necessary.
- ✓ **Let me know the style of communication or schedule of meetings that you prefer.** If there is something about my mentoring style that is proving difficult for you, please tell me so that you give me an opportunity to find an approach that works for you. No single style works for everyone; no one style is expected to work all the time. Do not cancel meetings with me if you feel that you have not made adequate progress on your research; these might be the most critical times to meet with a mentor.

- ✓ **Be prompt.** Respond promptly (in most cases, within 48 hours) to emails from anyone in our lab group and show up on time and prepared for meetings. If you need time to gather information in response to an email, please acknowledge receipt of the message and indicate when you will be able to provide the requested information.
- ✓ **Discuss policies on work hours, sick leave and vacation with me directly.** Consult with me and notify fellow lab members in advance of any planned absences. Graduate students can expect to work an average of 50 hours per week in the lab; post-docs and staff at least 40 hours per week. I expect that most lab members will not exceed two weeks of personal travel away from the lab in any given year. Most research participants are available during University holidays, so all travel plans, even at the major holidays, must be approved by me before any firm plans are made. I believe that work-life balance and vacation time are essential for creative thinking and good health and encourage you to take regular vacations. Be aware, however, that there will necessarily be epochs—especially early in your training—when more effort will need to be devoted to work and it may not be ideal to schedule time away. This includes the field season, for students/post-docs working on the lakes.
- ✓ **Discuss policies on authorship and attendance at professional meetings with me before beginning any projects to ensure that we are in agreement.** I expect you to submit relevant research results in a timely manner. Barring unusual circumstances, it is my policy that students are first-author on all work for which they took the lead on data collection and preparation of the initial draft of the manuscript.
- ✓ **Help other students with their projects and mentor/train other students.** This is a valuable experience! Undergraduates working in the lab should be encouraged to contribute to the writing of manuscripts. If you wish to add other individuals as authors to your papers, please discuss this with me early on and before discussing the situation with the potential co-authors.

What you should expect from me

- ✓ **I will work tirelessly** for the good of the lab group; the success of every member of our group is my top priority, no matter their personal strengths and weaknesses, or career goals.
- ✓ **I will be available for regular meeting and informal conversations.** My busy schedule requires that we plan in advance for meetings to discuss your research and any professional or personal concerns you have. Although I will try to be available as much as possible for “drop in business”, keep in mind that I am often running to teach a class or to a faculty meeting and will have limited time.
- ✓ **I will help you navigate your graduate program of study.** As stated above, you are responsible for keeping up with deadlines and being knowledgeable about requirements for your specific program. However, I am available to help interpret these requirements, select appropriate coursework, and select committee members for your oral exams.
- ✓ **I will discuss data ownership and authorship policies regarding papers with you.** These can create unnecessary conflict within the lab and among collaborators. It is important that we communicate openly and regularly about them. Do not hesitate to voice concerns when you have them.
- ✓ **I will be your advocate.** If you have a problem, come and see me. I will do my best to help you solve it.
- ✓ **I am committed to mentoring you, even after you leave my lab.** I am committed to your education and training while you are in my lab, and to advising and guiding your career development—to the degree you wish—long after you leave. I will provide honest letters of evaluation for you when you request them.

- ✓ **I will lead by example and facilitate your training in complementary skills needed to be a successful scientist, such as oral and written communication skills, grant writing, lab management, mentoring, and scientific professionalism.** I will encourage you to seek opportunities in teaching, even if not required for your degree program. I will also strongly encourage you to gain practice in mentoring undergraduate and/or high school students, and to seek formal training in this activity through the Delta program.
- ✓ **I will encourage you to attend scientific/professional meetings and will make an effort to fund such activities.** I will not be able to cover all requests but you can generally expect to attend at least one major conference per year, when you have material to present. Please use conferences as an opportunity to further your education, and not as a vacation. If you register for a conference, I expect you to attend the scientific sessions and participate in conference activities during the time you are there. Travel fellowships are available through the Environmental Engineering program, the Bacteriology Department, and the University if grant money is not available. I will help you identify and apply for these opportunities.
- ✓ **I will strive to be supportive, equitable, accessible, encouraging, and respectful. I will try my best to understand your unique situation, and mentor you accordingly.** I am mindful that each student comes from a different background and has different professional goals. It will help if you keep me informed about your experiences and remember that graduate school is a job with very high expectations. I view my role as fostering your professional confidence and encouraging your critical thinking, skepticism, and creativity. If my attempts to do this are not effective for you, I am open to talking with you about other ways to achieve these goals.

Yearly evaluation

Each year we will sit down to discuss progress and goals. At that time, you should remember to tell me if you are unhappy with any aspect of your experience as a graduate student here. Remember that I am your advocate, as well as your advisor. I will be able to help you with any problems you might have with other students, professors, or staff.

Similarly, we should discuss any concerns that you have with respect to my role as your advisor. If you feel that you need more guidance, tell me. If you feel that I am interfering too much with your work, tell me. If you would like to meet with me more often, tell me. At the same time, I will tell you if I am satisfied with your progress, and if I think you are on track to graduate by your target date. It will be my responsibility to explain to you any deficiencies, so that you can take steps to fix them. This will be a good time for us to take care of any issues before they become major problems.

Undergraduate Mentee Compact Example

Undergraduate Mentee: _____

Graduate or Postdoc Mentor: _____

This contract outlines the parameters of our work together on this research project.

1. Our major goals are:

- A. research project goals –
- B. mentee's personal and/or professional goals –
- C. mentor's personal and/or professional goals –

2. Our shared vision of success in this research project is:

3. We agree to work together on this project for at least ____ semesters.

4. The mentee will work at least ____ hours per week on the project during the academic year, and ____ hours per week in the summer.

The mentee will propose his/her weekly schedule to the mentor by the ____ week of the semester.

If the mentee must deviate from this schedule (e.g., to study for an upcoming exam), he or she will communicate this to the mentor at least ____ (weeks / days / hours) before the change occurs.

5. On a daily basis, our primary means of communication will be through (circle):

face-to-face / phone / email / instant messaging / _____

6. We will meet one-on-one to discuss our progress on the project and to reaffirm or revise our goals for at least ____ minutes ____ time(s) per month.

It will be the (mentee's / mentor's) responsibility to schedule these meetings. (circle)

In preparation for these meetings, the mentee will:

In preparation for these meetings, the mentor will:

At these meetings, the mentor will provide feedback on the mentee's performance and specific suggestions for how to improve or progress to the next level of responsibility through (circle):

a. a written evaluation

b. a verbal evaluation

c. other:

7. The mentor will train the mentee on new techniques and procedures using the following (e.g., written directions, hands-on demonstration, verbal direction as mentee does procedure, etc.):

8. If the mentee gets stuck while working on the project (e.g., has questions or needs help with a technique or data analysis), the procedure to follow will be:

9. The standard operating procedures for working in our research group, which all group members must follow and the mentee agrees to follow, include (e.g., wash your own glassware, attend weekly lab meeting, reorder supplies when you use the last of something, etc.):

10. Other issues not addressed above that are important to our work together:

By signing below, we agree to these goals, expectations, and working parameters for this research project.

Mentee's signature: _____ Date: _____

Mentor's signature: _____ Date: _____

Professor's signature: _____ Date: _____

Adapted from Branchaw, J. L., Pfund, C., and Rediske, R. *Entering Research: A Facilitator's Manual: Workshops for Students Beginning Research in Science*. (2010). New York, NY: W.H. Freeman & Company.

Expectations for Undergraduate Mentees

1. **Send me weekly email updates on Fridays by 5 pm** describing briefly what you've been working on, what you plan to do the following week, and any questions or troubles you had. Important things to include: projects you've worked on, broken equipment, storage/equipment conflicts, if your data looks weird.
2. **Attend lab meetings.** The entire lab assembles approximately once a week to discuss our research. Generally, the person leading the lab meeting will distribute reading materials in advance. You should read these materials and come prepared to participate actively in the discussion.
3. **Be organized.** There is a lot of overlap in projects, and it is essential that you keep track of all the samples in the way that I specify. This includes updating the data spreadsheets and lab notebooks immediately.
4. **Read background information and protocols about our projects, and about our lab's research.** This includes the protocol handout, the wiki, and related journal articles from the lab that I've suggested. I'd love to discuss any journal articles or protocol, so just say the work and we'll grab some coffee and chat.
5. **Be consistent with your lab schedule.** Email/call me if you are going to be very late or unable to make your scheduled lab time.
6. **Be independent.** I am periodically away, and I expect you to get things done well without me. Ask questions when I am around, but don't be afraid to try to do detective work on your own. We have a helpful, experienced lab, so folks other than me may be excellent resources.
7. **Respect the lab area and your colleagues.** Keep it neat and ask if you have questions on equipment use, cleaning, etc. It is very important that you tell me if a piece of equipment breaks. Do not be worried that I will be angry. These things happen all the time in labs, and the important thing is that I know it is broken and can arrange to have it fixed.
8. **Let me know if you need anything from me as a mentor, or if you have questions.** Be up-front and I will do the same.
9. **I have an "open door" policy.** Let me know if you are having troubles or concerns that you want to talk about with me, work-related or not. My phone number is XXX-XXX-XXXX.

From Ashley Shade, University of Wisconsin-Madison research mentor. Pfund, C., Branchaw J., and Handelsman, J. *Entering Mentoring*. (2014). New York, NY: W.H. Freeman & Company.

Graduate Mentee Compact Example

The broad goals of my research program

As part of my job as a professor, I am expected to write grants and initiate research that will make tangible contributions to science, the academic community, and society. You will be helping me carry out this research. It is imperative that we carry out good scientific method, and conduct ourselves in an ethical way. We must always keep in mind that the ultimate goal of our research is publication in scientific journals. Dissemination of the knowledge we gain is critical to the advancement of our field. I also value outreach and informal science education, both in the classroom and while engaging with the public. I expect you to participate in this component of our lab mission while you are part of the lab group.

What I expect from you

Another part of my job as professor is to train and advise students. I must contribute to your professional development and process in your degree. I will help you set goals and hopefully achieve them. However, I cannot do the work for you. In general, I expect you to:

- Learn how to plan, design, and conduct high-quality scientific research
- Learn how to present and document your scientific findings
- Be honest, ethical, and enthusiastic
- Be engaged within the research group and at least two programs on campus
- Treat your lab mates, lab funds, equipment, and microbes with respect
- Obtain your degree
- Work hard - don't give up!

You will take ownership over your educational experience

- **Acknowledge you have the primary responsibility for the successful completion of your degree.** This includes commitment to your work in classrooms and the laboratory. You should maintain a high level of professionalism, self-motivation, engagement, scientific curiosity, and ethical standards.
- **Ensure that you meet regularly with me and provide me with updates on the progress and results of your activities and experiments.** Make sure that you also use this time to communicate new ideas that you have about your work and challenges that you are facing. Remember: I cannot address or advise about issues that you do not bring to my attention.
- **Be knowledgeable of the policies, deadlines, and requirements of the graduate program, the graduate school, and the university.** Comply with all institutional policies, including academic program milestones, laboratory practices, and rules related to chemical safety, biosafety, and fieldwork.
- **Actively cultivate your professional development.** UW-Madison has outstanding resources in place to support professional development for students. I expect you to take full advantage of these resources, since part of becoming a successful engineer or scientist involves more than just doing academic research. You are expected to make continued progress in your development as a teacher, as an ambassador to the

general public representing the university and your discipline, with respect to your networking skills, and as an engaged member of broader professional organizations. The graduate school has a regular seminar series related to professional development. The Delta program offers formalized training in the integration of research, teaching, and learning. All graduate degree programs require attendance at a weekly seminar. Various organizations on campus engage in science outreach and information education activities. Attendance at conferences and workshops will also provide professional development opportunities. When you attend a conference, I expect you to seek out these opportunities to make the most of your attendance. You should become a member of one or more professional societies, such as the Water Environment Federation, the American Society for Microbiology, or the American Society for Limnology and Oceanography.

You will be a team player

- **Attend and actively participate in all group meetings, as well as seminars that are part of your educational program.** Participation in group meetings does not mean only presenting your own work, but providing support to others in the lab through shared insight. You should refrain from using your computer, Blackberry, or iPhone during research meetings. Even if you are using the device to augment the discussion, it is disrespectful to the larger group to have your attention distracted by the device. Do your part to create a climate of engagement and mutual respect.
- **Strive to be the very best lab citizen.** Take part in shared laboratory responsibilities and use laboratory resources carefully and frugally. Maintain a safe and clean laboratory space where data and research participant confidentiality are protected. Be respectful to, tolerant of, and work collegially with all laboratory colleagues: respect individual differences in values, personalities, work styles, and theoretical perspectives.
- **Be a good collaborator.** Engage in collaborations within and beyond our lab group. Collaborations are more than just publishing papers together. They demand effective and frequent communication, mutual respect, trust, and shared goals. Effective collaboration is an extremely important component of the mission of our lab.
- **Leave no trace.** As part of our collaborations with the Center for Limnology and other research groups, you will often be using equipment that does not belong to our lab. I ask that you respect this equipment and treat it even more carefully than our own equipment. Always return it as soon as possible in the same condition you found it. If something breaks, tell me right way so that we can arrange to fix or replace it. Don't panic over broken equipment. Mistakes happen. But it is not acceptable to return something broken or damaged without taking the steps necessary to fix it.
- **Acknowledge the efforts of collaborators.** This includes other members of the lab as well as those outside the lab.

You will develop strong research skills

- **Take advantage of your opportunity to work at a world-class university by developing and refining stellar research skills.** I expect that you will learn how to plan, design, and conduct high-quality scientific research.
- **Challenge yourself by presenting your work at meetings and seminars as early as you can and by preparing scientific articles that effectively present your work to others in the field.** The "currency" in

science is published papers: they drive a lot of what we do. And because our lab is supported by taxpayer dollars, we have an obligation to complete and disseminate our findings. I will push you to publish your research as you move through your training program, not only at the end. Students pursuing a master's degree will be expected to author or make major contributions to at least one journal paper submission. Students pursuing a doctoral degree will be expected to lead author on at least two journal paper submissions, preferably three or four.

- **Keep up with the literature so that you can have a hand in guiding your own research.** Block at least 1 hour per week to peruse current tables of content for journals or do literature searches. Participate in journal clubs. Better yet, organize one!
- **Maintain detailed, organized, and accurate laboratory records.** Be aware that you your notes, records, and all tangible research data are my property as the lab director. When you leave the lab, I encourage you to take copies of your data with you. But one full set of all data must stay in the lab, with appropriate and accessible documentation. Regularly back up your computer data to the server (see the wiki for more instructions).
- **Be responsive to advice and constructive criticism.** The feedback you get from me, your colleagues, your committee members, and your course instructors is intended to improve your scientific work.

You will work to meet deadlines

- **Strive to meet deadlines: this is the only way to manage your process.** Deadlines can be managed in a number of ways, but I expect you to do your best to maintain these goals. We will establish mutually agreed upon deadlines for each phase of your work during one-on-one meetings at the beginning of each term. For graduate students, there is to be a balance between time spent in class and time spent on research and perhaps on outreach and teaching. As long as you are meeting expectations, you can largely set your own schedule. It is your responsibility to talk with me if you are having difficulty completing your work, and I will consider your progress unsatisfactory if I need to follow up with you about completion of your lab or coursework.
- **Be mindful of the constraints on my time.** When we set a deadline, I will block off time to read and respond to your work. If I do not receive your materials, I will move your project to the end of my queue. Allow a minimum of 1 week prior to submission deadlines for me to read and respond to short materials, such as conference abstracts, and 3 weeks for me to work on manuscripts or grant proposals. Please do not assume I can read materials within a day or two, especially when I am traveling.

You will communicate clearly

- **Remember that all of us are “new” at various points in our careers.** If you feel uncertain, overwhelmed, or want additional support, please overtly ask for it. I welcome these conversations and view them as necessary.
- **Let me know the style of communication or schedule of meetings that you prefer.** If there is something about my mentoring style that is proving difficult for you, please tell me so that you give me an opportunity to find an approach that works for you. No single style works for everyone; no one style is expected to work all of the time. Do not cancel meetings with me if you feel that you have not made adequate progress on your research; these might be the most critical times to meet with a mentor.

- **Be prompt.** Respond promptly (in most cases, within 48 hours) to emails from anyone in our lab group and show up on time and prepare for meetings. If you need time to gather information in response to an email, please acknowledge receipt of the message and indicate when you will be able to provide the requested information.
- **Discuss policies on work hours, sick leave, and vacation with me directly.** Consult with me and notify fellow lab members in advance of any planned absences. Graduate students can expect to work an average of 50 hours per week in the lab; postdocs and staff at least 40 hours per week. I expect that most lab members will not exceed 2 weeks of personal travel away from the lab in any given year. Most research participants are available during university holidays, so all travel plans, even at the major holidays, must be approved by me before any firm plans are made. I believe that work-life balance and vacation time are essential for creative thinking and good health and encourage you to take regular vacations. Be aware, however, that there will necessarily be epochs - especially early in your training - when more effort will need to be devoted to work and it may not be ideal to schedule time away. This includes the field season, for students/postdocs working on the lakes.
- **Discuss policies on authorship and attendance at professional meetings with me before beginning any projects to ensure that we are in agreement.** I expect you to submit relevant research results in a timely manner. Barring unusual circumstances, it is my policy that students are first author on all work for which they took the lead on data collection and preparation of the initial draft of the manuscript.
- **Help other students with their projects and mentor/train other students.** This is a valuable experience! Undergraduates working in the lab should be encouraged to contribute to the writing of manuscripts. If you wish to add other individuals as authors to your papers, please discuss this with me early on and before discussing the situation with the potential coauthors.

What you should expect from me

- **I will work tirelessly** for the good of the lab group; the success of every member of our group is my top priority, no matter their personal strengths and weaknesses, or career goals.
- **I will be available for regular meetings and informal conversations.** My busy schedule requires that we plan in advance for meetings to discuss your research and any professional or personal concerns you have. Although I will try to be available as much as possible for “drop-in business,” keep in mind that I am often running to teach a class or to a faculty meetings and will have limited time.
- **I will help you navigate your graduate program of study.** As stated previously, you are responsible for keeping up with deadlines and being knowledgeable about requirements for your specific program. However, I am available to help you interpret these requirements, select appropriate coursework, and select committee members for your oral exams.
- **I will discuss data ownership and authorship policies regarding papers with you.** These can create unnecessary conflict within the lab and among collaborators. It is important that we communicate openly and regularly about them. Do not hesitate to voice concerns when you have them.
- **I will be your advocate.** If you have a problem, come and see me. I will do my best to help you solve it.
- **I am committed to mentoring you, even after you leave my lab.** I am committed to your education and training while you are in my lab, and to advising and guiding your career development - to the degree you wish - long after you leave. I will provide honest letters of evaluation for you when you request them.

- **I will lead by example and facilitate your training in complementary skills needed to be a successful scientist, such as oral and written communication, grant writing, lab management, mentoring, and scientific professionalism.** I will encourage you to see opportunities in teaching, even if not required for your degree program. I will also strongly encourage you to gain practice in mentoring undergraduate and/or high school students, and to seek formal training in this activity through the Delta program.
- **I will encourage you to attend scientific/professional meetings and will make an effort to fund such activities.** I will not be able to cover all requests, but you can generally expect to attend at least one major conference per year, when you have material to present. Please use conferences as an opportunity to further your education, and not as a vacation. If you register for a conference, I expect you to attend the scientific sessions and participate in conference activities during the time you are there. Travel fellowships are available through the environmental engineering program, the Bacteriology Department, and the university if grant money is not available. I will help you identify and apply for these opportunities.
- **I will strive to be supportive, equitable, accessible, encouraging, and respectful. I will try my best to understand your unique situation, and mentor you accordingly.** I am mindful that each student comes from a different background and has different professional goals. It will help if you keep me informed about your experiences and remember that graduate school is a job with very high expectations. I view my role as fostering your professional confidence and encouraging your critical thinking, skepticism, and creativity. If my attempts to do this are not effective for you, I am open to talking with you about other ways to achieve these goals.

Yearly evaluation

Each year we will sit down to discuss progress and goals. At that time, you should be sure to tell me if you are unhappy with any aspect of your experience as a graduate student here. Remember that I am your advocate, as well as your adviser. I will be able to help you with any problems you have with other students, professors, or staff.

Similarly, we should discuss any concerns you have with respect to my role as your adviser. If you feel that you need more guidance, tell me. If you feel that I am interfering too much with your work, tell me. If you would like to meet with me more often, tell me. At the same time, I will tell you if I am satisfied with your progress, and if I think you are on track to graduate by your target date. It will be my responsibility to explain to you any deficiencies, so that you can take steps to fix them. This will be a good time for us to take care of any issues before they become major problems.

From Professor Trina McMahon, University of Wisconsin-Madison. Pfund, C., Branchaw, J., and Handelsman, J. (2014). *Entering Mentoring*. New York, NY: W.H. Freeman & Company.

Clinical Scholars Mentee Compact Example

Clinical Research Scholars Program (CRSP) Team Mentoring Expectations

A critical element of the CRSP is the use of team mentoring. For this program, team mentoring means more than having multiple mentors working with the mentee; it means having mentors working together as a team to contribute to the mentee's career development. The concept was developed through the NIH Roadmap Initiative, which found that "the scale and complexity of today's biomedical research programs increasingly demands that scientists move beyond the confines of their own discipline and explore new organizational models for team science." Today's research requires bringing together the perspectives of multiple disciplines to examine a research question right from the beginning. This multidisciplinary approach allows us to develop and conduct research projects that are new and innovative and that would not be possible using a traditional single discipline or multiple disciplines working individually with a mentee approach. It is the synergy created when investigators from multiple disciplines come together that will result in the development of new scientific approaches. This team mentoring model provides benefits for the mentee as he/she learns multidisciplinary methods of discovery and the mentors as they have the opportunity to bring fresh perspectives to the research question they are examining. The CRSP is promoting the development of this team science through the conduct of multidisciplinary research and the use of team mentoring for mentees.

Team Mentoring Goals

1. To enhance the supportive academic environment for team science for the mentee.
2. Working as a team and providing multiple perspectives, to facilitate the entry of the mentee into the University culture, including the structures, processes, and interpersonal climate of the University.
3. To facilitate the development of appropriate clinical research skills and team science approaches related to the balance and evaluation of research, scholarship, and service.
4. To provide opportunities for developing and working on mentored and independent multidisciplinary research projects with a multidisciplinary research team.
5. To enhance decision-making and other skills involved in working with a team related to the mentee's career development and advancement.

Expectations of Mentors

1. The mentoring team must conduct regular and frequent team meetings with the mentee. There should be a minimum of one hourly meeting of the primary mentors and the mentee per week, and at least one hourly meetings per month of the entire mentoring team and the mentee. Consultants contributing to specific research issues should meet with the team when these issues are being discussed or decisions regarding these issues are being made.
2. The mentoring team must participate in the one-day team mentoring training retreat to obtain or enhance skills in team mentoring.
3. The mentoring team will develop, with the mentee, clearly delineated specific expectations of the substantive learning/skills to be achieved through the use of team mentoring in the program.

Common Cognitive Distortions

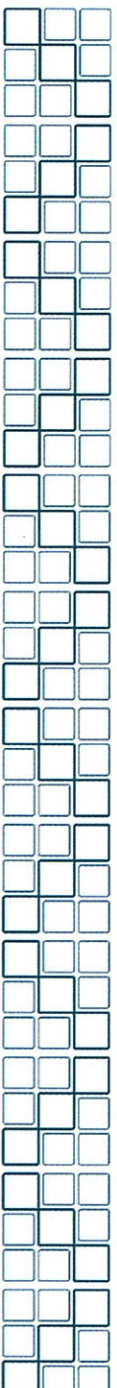
Here are some habitual thinking patterns that can limit student success in academic and research environments when used to an extreme. When we are aware of the cognitive distortions we tend to use, we can work to shift our thinking to a more rational and balanced thoughts when possible.

Cognitive Distortion	Explanation	Example
All-or-nothing thinking	Your performance is either perfect or it is a complete failure.	Your lab meeting presentation went well; however, you stumbled on one question. Therefore, your lab meeting presentation was a failure.
Catastrophizing	You exaggerate the implications of a set-back or mistake.	You forget to put your samples into the freezer and have to throw them away the next day. Therefore, your PI will never write you a recommendation letter and you will never get into grad school.
Minimizing	You downplay the importance of your accomplishments, positive qualities, or positive experiences.	Your PI congratulates you on receiving a travel award to go to a conference. You tell her it was no big deal and everyone probably got one.
Jumping to Conclusions (Mind reading and Fortune Telling)	You make assumptions about what someone else is thinking or you anticipate that things will turn out badly, convince yourself that they will and act accordingly.	Your postdoc is grumpy and ignoring you today; you assume it is because it took you a long time yesterday to set up your experiment and make your buffers. You are sure you won't get the scholarship your mentor suggests you apply for, so you don't work very hard on the application.
Emotional Reasoning	You assume that your emotions reflect reality	You made a terrible mistake today and feel like an idiot; therefore, you tell yourself (and others) "I am an idiot". You feel like you don't belong and tell yourself "I don't belong".

Overgeneralization	You view a single negative event as a predictable pattern for the future.	Because you struggled on your first journal club presentation you assume you will always struggle in journal club. You also assume you will not do well in other areas of your internship.
Personalization	You blame yourself for something you are not entirely (or at all) responsible for.	While rushing out your supervisor gives you brief instructions about how to analyze data for a morning meeting. You misunderstand, or he forgets to point out one critical step, and don't have the data analyzed correctly. Therefore, you feel like a failure.
Should statements	You criticize yourself using rigid fixed language that does not accurately reflect the nuances of a situation.	You tell yourself things like "I am a biology major so I should know how to read a paper, or I am lucky to have this internship so I should enjoy all aspects of it. This only serves to make you feel guilty.
Mental Filter	You pick out a single negative detail and dwell on it.	You generally enjoy your research and get along well with people in your research group, but you had one difficult interaction with your mentor. Whenever you think about the summer, or talk about it, you focus on this one aspect of the experience.

NIH OITE, 2017 by SLM. Modified from http://sarconline.sdes.ucf.edu/files/2014/01/12_COGNITIVE_DISTORTIONS_IN_ACADEMICS1.pdf and <https://healthpsych.com/psychology-tools-what-are-cognitive-distortions/>

Having a positive impact on others and/or society	Substantial alone time and solitary work	Making decisions and having power to decide courses of action
Using creativity, imagination; being innovative	Substantial teamwork and group interaction	A global perspectives and international work
A lot of mental challenge and problem-solving	Flexibility in work schedule	Work that shares my ethics/morality
Intellectual status; to acknowledged as an “expert” in a given	Order and structure	Casual work environment (ie clothing)
Using cutting edge or pioneering technologies or techniques	Opportunities for supervision, power, leadership, influence	Opportunity for balance between work and family
Friendships and warm working relationships	Routine, predictable work and work projects, hours	Job stability and security
Precision work with little tolerance for error	Variety and a changing work pace	Live in a big city
Respect, recognition, esteem	Many deadlines and time demand/pressure challenges	Live in a small town
Tranquility, comfort, and avoidance of pressure	Strong financial compensation and financial rewards	Live near family
Frequent dealings with the public	Opportunity for significant teaching and mentoring	Have a short commute



Action Planning

- What 2-3 things can you do differently now?
- What situations will you handle differently?
- What obstacles might you have to overcome and how?
- What will you do once at your new job to continue to be a great manager?

Communication Styles

1. SUPPORTIVE
2. EMOTIVE
3. REFLECTIVE
4. DIRECTIVE

Can be identified by the:

- Amount of focus placed on task
- Amount of focus on person/people involved

SUPPORTIVES

- People oriented
- Empathetic with good listening skills
- Diplomatic; strength is building bridges
- Great team builders and team members
- Dislike conflict, but even in conflict they work to diffuse it with warmth and interpersonal skills
- Prefer slower and relaxed pace of speaking

EMOTIVES

- Socializers who are talkative and friendly
- Excitable, and express themselves dramatically and in a very fast-paced way
- Like to be with others and are good at getting others excited
- Get bored and have short attention spans
- Want freedom from details and complexity
- Want recognition and social interaction

REFLECTIVES

- Cautious thinkers
- Focus is detail and process
- Precise, accurate, organized and structured
- Ask specific questions and prefer well thought out answers
- Tend to be quiet and observant; thorough and need time to think things through

DIRECTIVES

- Dominant, decisive and competitive
- Focus on results and control
- Prefer fast pace; often make fast decisions
- Tend to be independent and strong-willed
- Will often interrupt to get to the point

Adapted from People Styles at Work...And Beyond: Making Bad Relationships Good and Good Relationships Better (Bolton and Bolton) and
<https://resource.mccneb.edu/hmr/files/hmrl/MetroNHMRLText/p100-193.pdf>

ACTION ITEMS: COMMUNICATION STYLES

1. What communication style(s) are easiest for you to use?
2. What style(s) are hardest for you to use? Why?
3. What style(s) are hardest for you to respond to and deal with? Why?

When you are trying to communicate with someone the primary responsibility for having a successful communication rests on YOU. If you can flex to their style, you will have more success.

4. What are some strategies to use to work more effectively across communication styles?

When dealing with a SUPPORTIVE:

When dealing with an EMOTIVE:

When dealing with a REFLECTIVE:

When dealing with a DIRECTIVE: