Course 1: The Strategic Postdoc
Module 1: Positioning Yourself for the Postdoc

Session 1: Acknowledge Your Needs, Preferences, and Values
Activity 1.2: Resolving Role Conflicts

In this activity, you will apply what you have learned in Session 1 to identify possible role conflicts in different situations between a trainee (student or postdoc) and their research advisor/mentor (principal investigator, PI). For the following exercises, carefully read the case study before you answer the questions below it.

Briefly, the different roles a PI has are:
- **Supervisor** - Manages your productivity and tracks progress. Most conversations are usually instructions or negotiations.
- **Mentor** - Supports your holistic development, aids your career development, and is interested in making sure you achieve your career goals.
- **Trainer (or Educator)** - Trains you directly. Training can consist of technical training or leadership skills.

1. **Natalie and her tight deadlines:**
   Last year, Natalie, a third-year PhD candidate, made an incredible discovery in her research project. Natalie works in a very competitive field, and her research mentor, Daniel, wanted to publish her work immediately before a competing lab could beat them to it. For that reason, Natalie started to work extra hard and spent over 10 hours a day in the lab, working through holidays and weekends. Although she was able to successfully publish her paper in a great journal, by the end of the journey she was feeling extremely exhausted and was getting sick a lot, and it was hard for her to even perform basic lab work.

   Natalie's research opened up great opportunities for the lab, so Daniel really wanted to immediately start working on the follow-up experiments. His grant was due in 12 months and he was hoping to generate preliminary data for it. Daniel approached Natalie and explained to her the urgency of the matter and expressed that he believed in Natalie's capacity to turn around these other projects quickly and get other publications. To avoid disappointing her research mentor, she immediately began working on the next round of experiments. However, within a few days, she started to feel sick and sluggish again.
   a. Identify any possible role conflict(s) between Daniel and Natalie. For any role conflict identified, what is the predominant role played by Daniel (Mentor, Supervisor, Trainer)?

      Natalie is not getting the emotional support she needs or any advice on how to manage her life-work balance. (Mentor)

Daniel needs to write grants and prioritize the workload of Natalie in order to increase lab productivity. (Supervisor)

b. How could Natalie have avoided or managed the role conflict with her research mentor?
    She could have scheduled a meeting with mentors outside the lab or with a therapist to get emotional support and advice and then talked to Daniel before the second paper kicked off. She could have also talked with Daniel about her mental and physical exhaustion.

c. What would you have done differently if you were in her shoes?
    She could have told him while she was writing the first paper that once they published, she was going to need some time to recover/balance out.

2. **Seeking external technical assistance:**
    Emilio is a fourth-year PhD candidate and is currently trying to push his research project to the next level. But Emilio knows that it will be impossible to achieve his goal without using electron microscopy (EM). His advisor, Nicholle, is an expert in EM but she doesn't usually spend time in the lab. In the past, Emilio sought her technical expertise but she would decline to help, saying that she was too busy applying for grants and that 'he can teach himself.' So he decided to ask a colleague in their department to teach him how to do EM. When Nicholle found out, she got really mad. She was concerned that external collaborators would steal the information for their own advantage and forbid Emilio from reaching out to other labs and getting external help. But Emilio still needed help in order to finish the last few experiments for his thesis project.

    a. What role conflicts can you identify in Emilio's story? Classify any role conflict by the predominant role played by Nicholle (Mentor, Supervisor, Trainer).
        Nicholle needs to write grants and balance that with lab work. (Supervisor)

        Nicholle wants to be in control of possible collaborations. (Supervisor)

        Emilio needs to learn a new technique, but his PI is too busy to teach him. (Trainer)

    b. How could Emilio have avoided or managed the role conflict with Nicholle?
        Emilio could have talked to Nicholle about the possibility of seeking external help. He should confer with her over email so there's a paper trail he can leverage in case he needs to seek external support.

        Emilio could have asked his dissertation committee for advice.

    c. How should Emilio move forward in order to finish his project and graduate on time?
        Emilio can coordinate a meeting with Nicholle to come up with a plan.

3. **Sean and his career dilemma:**

Sean is a fifth-year PhD candidate and since he was an undergrad, he was set on becoming a faculty member. He started working in Maria's lab as a summer intern, and Maria took him under her wing and promised to help him with his goal to stay in academia. Sean decided to join Maria's lab for his PhD. Since he joined, Maria has been closely mentoring him and pushing him to work hard to become a competitive candidate by the end of his PhD. She often referred to him as her protegé. Recently, Sean has been getting very interested in science policy and has been going to career services, contacting alumni, and even conducting informal interviews to learn more about this field. After months of deep reflection, Sean has realized that he no longer wants to go the academic route. Although he feels confident in his skills to continue the academic route, he is not so competitive for a career in science policy and would like to get more experience. He knows that he needs to tell Maria as soon as possible, but he is too afraid that he would lose his close relationship with his advisor.

a. What seems to be the problem between Sean and Maria? Briefly explain.

Although Maria has been very supportive, it seems like Sean fears telling her the truth about his new desire to pursue a career in science policy. Now he needs to get ready for his new career, and he needs the support and mentorship of Maria.

b. What advice would you give to Sean? How can he navigate the problem(s) described in question 3a? Briefly explain.

He could have been proactive about discussing with Maria his changing career interests and the career exploration he's been doing. If he doesn't feel confident talking with Maria, Sean could seek for other mentors to help him gain more information about science policy and navigate this issue.

c. What steps would you recommend Sean to take in order to successfully transition out of his PhD? Briefly explain.

If he can't get the experience needed for science policy in his last year as a PhD, he could consider taking a postdoctoral position that would allow him to continue his career exploration. Sean could explore a science policy fellowship that allows him to learn more about that world.