Mentoring Guide #2: Building the Foundation for a Successful Advising Relationship

Nora Beck Tan, Illumina Executive Coaching

This second Guide in the Series highlights practices that help NRC Advisers create healthy advising relationships. It includes insights into adopting constructive advising perspectives, practical advice on preparing for a new NRC Associate’s arrival, details on important topics to address early in the relationship, and recommendations that will help get your advising partnership off to a great start.

I. Introduction

Like other mentoring relationships, NRC Adviser-Associate relationships tend to develop in a predictable pattern. In the beginning stages of the relationship you get to know each other, establish practices for working together, and build trust. As you gain familiarity with one another, the working relationship falls into a comfortable pattern and you make progress towards goals and objectives, working effectively together to address challenges. Finally, as your active advising relationship comes to a close, you and your mentee have the opportunity to celebrate your success and envision the different relationship you will have in the future. This Guide focuses on the early stages, diving deep into what you can do to help establish an effective advising relationship that is productive and constructive for both of you.

II. Getting Grounded

Preparing for success in an NRC advising relationship starts with cultivating a healthy mindset. As discussed in Mentoring Guide #1, successful mentors adapt their approach to each individual, provide guidance rather than detailed direction and supervision, keep both research and learning objectives in focus, and support Associate success. It is best to view your relationship as an equitable mutually beneficial partnership in which even though the parties are not necessarily “equals,” they both respect the value the other brings and the benefits of interdependence. Another healthy approach is “win-win” thinking. This means striving for mutually beneficial agreements, believing that a “win” for all is ultimately a better solution in any conflict than for one person to prevail. A commitment to these perspectives will help you develop a respectful mindset, which will pave the way for a productive and collegial advising relationship to develop.

III. Getting Ready

Section III Companion Resources: Appendix A – Adviser Pre-arrival Preparations Checklist Table 1 – Example NRC Onboarding Plan

A big part of getting off to a great start relies on things you do before the new NRC Associate arrives. There is no better confidence-builder for a new Associate than to know they are

Nora@illuminaexecutive.com, 443-707-5613, www.illuminaexecutive.com

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supported and empowered to start making research progress right away. Pre-arrival preparations, which are part of the Adviser’s role, typically fall into these categories:

- Self-preparation
- Physical Workspaces and Technical Resources
- Facilitating Onboarding

It is good to start with **self-preparation**, especially since a fair amount of time may elapse between the time you are notified of the NRC award and the date the Associate first reports to work at your laboratory. Give yourself ample time before the Associate’s arrival date to re-familiarize yourself with your agency’s policies and practices relevant to postdoctoral Associates, agency-specific NRC-program policies and requirements, and the NRC’s general policies for the Research Associateship Programs (RAP). Check with your agency’s Laboratory Program Representative (LPR) for information on expectations of NRC Advisers, relevant postdoctoral policies at your agency, and any other available resources. The National Academies’ NRC Research Associateship Programs Policies, Practices, and Procedures Handbook is an excellent resource for understanding the NRC RAP expectations and policies.

Take the time to re-familiarize yourself with the Associate’s research proposal and brush up on your mentoring skills by reading the Mentoring Guides for NRC Advisers. You might also consider exploring selections from the companion list of Resources for Self-Study. If you have not previously mentored NRC Associates, you might recruit a more experienced Adviser as a coach and mentor for yourself or take a workshop on STEM advising or mentoring.

Organize your schedule to minimize travel and maximize availability during the new Associate’s first couple of weeks if you are able. If this is not possible, be sure to identify someone who will provide any assistance the new Associate may need in your absence.

With respect to **physical workspaces and technical resources**, aim to have as much as possible in place before the Associate arrives. Make sure they have a suitable personal workspace: an ergonomically designed desk, chair, and computer station with appropriate lighting; telephone; and sufficient office supplies. Work with your IT department to secure any needed computing resources (e.g., computer, secure-access cards, peripherals, specialty software, and network access). If applicable, arrange for an electronic laboratory notebook and/or access to high-performance computing.

If the new Associate will be working in a laboratory, it’s equally important to meet physical workspace and resource needs in that environment, including laboratory access, safety training requirements, and personal protective equipment. Check on instruments that the Associate plans to use and ensure they are available, in good working order, and that their calibration is up to date. Identify suitable workbench and storage space. Finally, consider ordering supplies needed to begin the research project, especially any items with long-lead times (e.g., specialty chemicals) so that the Associate can start working soon after their arrival.
By proactively **facilitating onboarding**, you can help an NRC Associate transition smoothly to their new location and workplace. This includes helping with pre-arrival issues and developing a well-thought-out onboarding plan.

Keep pre-arrival communication channels open. Associates often have questions about relocation and logistics. Providing appropriate information about temporary lodging, desirable and convenient places to live, housing options, and public transportation can be very helpful. New Associates may also be interested in making connections to the local community. This can be especially important to those coming from abroad. Suggestions and resources tailored to their interests in cultural, recreational, and social opportunities outside the laboratory may be very much appreciated.

If your facility operates under strict security protocols, security paperwork and pre-screening activities generally start well in advance of the Associate’s arrival. The NRC experience will be the first time working at a federal facility for most Associates, so your guidance in navigating pre-arrival security processes may be very important.

Developing an onboarding plan helps to provide structure for the new Associate (and you) during the early weeks of their tenure. New Associates need to understand what is expected of them in your organization and what specific actions they can take to get off to a good start. While details of the plan will vary, it is a good idea to include activities and tasks that can be accomplished within the first 1-3 months and to break those down into what is expected on the first day, in the first week, in the first month, and in the first quarter. You might find it useful to start with a standard employee onboarding template and modify it to address your specific situation. The table below gives some examples of typical activities that could be included in a postdoctoral researcher’s onboarding plan:

<table>
<thead>
<tr>
<th>First Day</th>
<th>First Week</th>
<th>First Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security and campus access</td>
<td>Lab safety orientation</td>
<td>Safety training</td>
</tr>
<tr>
<td>New employee orientation</td>
<td>Tours – user facilities, campus</td>
<td>Employee orientation class</td>
</tr>
<tr>
<td>with HR</td>
<td>1-on-1 meetings with immediate teammates</td>
<td>Additional required training</td>
</tr>
<tr>
<td>Time to settle into new</td>
<td>Daily check-ins with Adviser</td>
<td>Weekly meetings with Adviser</td>
</tr>
<tr>
<td>workspace</td>
<td>Research planning meeting with Adviser</td>
<td>1-on-1 meetings with collaborators</td>
</tr>
<tr>
<td>Lunch with Adviser and</td>
<td>Further onboarding discussions</td>
<td>Meet other NRC Associates</td>
</tr>
<tr>
<td>other lab members</td>
<td>Lab instrument training</td>
<td>Group seminar</td>
</tr>
<tr>
<td>Review onboarding plan</td>
<td>IT training</td>
<td>Branch/Division meetings</td>
</tr>
<tr>
<td>with Adviser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tours – labs, office area</td>
<td></td>
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</tr>
<tr>
<td>Computer setup with IT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Introductions to group</td>
<td></td>
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<tr>
<td>members</td>
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</table>

Be sure to note specific dates for activities and events where appropriate, such as team meetings, seminars, and training classes. Allow ample time on the Associate’s schedule and yours for
onboarding activities and discussion of research topics – or whatever else they may need your help with, while settling into their new environment and getting started on their project.

If there are recurring meetings that professionals in your organization are required or encouraged to attend, be sure to provide a list. If possible, request the new Associate be added to calendar invites in advance.

Cultivating a healthy mindset, opening your schedule, preparing yourself, the physical workspace and resources and developing an onboarding plan all help you to lay the groundwork for a good start. Next, it’s time to welcome the new Associate.

IV. Getting Started

Section IV Companion Resources:
Appendix B – Expectations and Working Guidelines Topics, with recommended exercise and practice
Appendix C – Contracting Discussion Template for Successful Advising Relationships, with recommended exercise.
Appendix D – Developing a Roadmap for the Postdoctoral Program, with example and recommended practice.

The first few weeks or months that you and the new Associate spend together build the foundation for a collegial and productive relationship during the NRC Associate’s tenure – and beyond. Though you may prefer a casual and informal advising relationship, in the early stages it’s important to provide some structure. NRC Associates, no matter how talented and independent they are, will need help understanding and adapting to their new workplace environment. Plus, working through a series of specific tasks together early on creates opportunity to develop rapport, become familiar with each other’s work styles, and begin to build trust – all of which are part of any healthy relationship. It is typical to spend a lot of time with the new NRC Associate at the outset and then taper off as you work through initial topics, and as they become familiar with the work environment and build confidence. Topics to prioritize during these initial stages of the NRC advising relationship include: i) Expectations and Working Guidelines, ii) Research Start-up, and iii) Developing a Realistic Picture of Success.

Expectations and Working Guidelines

We touched briefly on setting expectations and clarifying working guidelines in the first Mentoring Guide. Since this is particularly important at the outset of your advising relationship, we will go into more depth here. The expectation and guideline-setting topics that are important to address with your new mentee early fall into the following categories:

- General Expectations of NRC Associates
- Administrative Policies and Practices of Special Relevance to Postdoctoral Associates
- Working Together Effectively
- Research Program “Guardrails”
- Career Advancement
Because there is no single right way or right time to approach these, we will simply describe the categories here. Appendix B: Expectations and Working Guidelines Topics has recommendations on developing and using a topics list in your own advising practice. You may want to incorporate conversations on some of these topics into your onboarding plan as well.

**General expectations of NRC Associates** is the most basic category. It encompasses things like work hours, what to do in an emergency, how to learn about closures, and standard codes of employee conduct. It’s also important that the new Associate understands expectations and policies regarding civility, respect, harassment, and bullying, and what to do if they experience inappropriate behavior. If the NRC Associate attends your agency’s new employee orientation program, many of these topics may be covered there. It is still good practice to review them with the new Associate, answering any questions and pointing out the local nuances in workplace practices and norms. While NRC Associates are not employees and therefore do not have leave, *per se*, it is important to discuss expectations regarding time away from the laboratory for vacation, medical appointments, family emergencies, etc. Be sure to address any discrepancies – real or perceived – between your agency’s policies and NRC RAP policies.6

Though it is generally a good idea to minimize the administrative burden on NRC Associates,3 there will be some **administrative policies and practices of special relevance to postdoctoral Associates**. These are the policies and practices directly related to executing the research program, and you should review them with your new mentee. They concern laboratory safety, laboratory and instrument access, study approval protocols, publication and external presentation review processes (if any), intellectual property policies and practices and so forth. You may also wish to discuss any policies and practices for purchasing supplies and equipment and for travel.

In addition to these agency-specific, non-negotiable topics, it is important to discuss expectations and guidelines that relate directly to your advising relationship. A great place to start is to talk about how you will **work together effectively**. This important conversation – equal parts discussion and negotiation – is about establishing the mechanics of your mentoring partnership. Though you may have envisioned the working relationship developing organically, an explicit early conversation about how you will work together is highly recommended.8-10 It is a great way to surface unspoken assumptions and calibrate mutual expectations. Good topics to discuss and agree on include: contact information and preferred methods of contact, preferred work hours and meeting times, rules on “interruptions” (signaling when they are okay vs. not okay), communication preferences, documentation practices, expectations of confidentiality for mentoring conversations, how each of you prefers to receive feedback, how often you will check in about the health of your mentoring relationship, and any other ground rules you may wish to establish. You might also discuss how you will handle specific types of interactions. For example, you might agree that for quick questions, the Associate should just drop by your office, while in-depth discussions on research results or career goals should be scheduled in advance. Refer to Appendix C: Contracting Discussion Template for Successful Advising Relationships for a conversation guide that will help you create your ground rules for working effectively together.
A discussion on research program “guardrails” will help foster mentee independence. The new NRC Associate needs to understand where the boundaries of their freedom are in order to proceed with confidence. You also need to feel confident that the research program will stay within parameters that are acceptable to you, your group, and your agency. Guardrails related to the execution of the primary research project is a good place to start. Are there any anticipated research activities that will need approval? Has the research been funded under a grant that limits deviations in scope or direction? If so, it’s best to clarify the boundaries up front. You might also discuss your policy on adding side projects or new collaborations to the research portfolio; is this acceptable? If so, at what point during the NRC tenure may new projects be initiated? What percentage of time is reasonable to spend on these endeavors? How do you, as an Adviser, wish to be involved in the initiation or monitoring of such projects, if at all? It helps the Associate to be clear on which decisions they can make on their own, which they need to inform you of or consult with you on, and which may require the involvement of others.

An essential part of fostering independence is to help postdoctoral Associates develop a contextual understanding of their research program – and yours. Spend some time talking about your agency’s vision, mission, and structure. Explain how your group, and the broader organizational unit of which it is a part, fit into this mission. Be explicit about how their research ties into the bigger picture. This understanding will help when changes need to be made in research direction, and it provides context for future conversations about choosing new directions and/or additional projects.

Getting an early start on career advancement discussions and continuing these throughout the course of your advising relationship is also a recommended practice. As discussed in Mentoring Guide #1, there are many ways Advisers can help NRC Associates prepare for their next career step. Clarify how you can (and can’t) help as early as possible, so the NRC Associate will know what to expect. Learn what the Associate is and is not yet certain about regarding their career path. If their preferences are already clear, you might want to discuss options for adapting the research program to fit career interests. If not, you might talk about possible directions and how career exploration fits into their time as an NRC Associate. Share examples of how you may assist them, such as by making introductions or advocating for their participation in high-visibility events. Be sure to be direct and realistic about the potential for permanent employment at your agency upon conclusion of the postdoctoral program. Help the Associate understand from the outset what you can and cannot do, including how the two of you might work together to increase their chances of securing a position at your agency – assuming that’s feasible, and of interest to your mentee.

Research Start-up

Research start-up discussions will likely be eagerly anticipated by both you and the new NRC Associate. They are also a great opportunity to begin the process of helping your new mentee develop their skills in planning scientific research. This is the time to get into the details of the NRC Research Proposal and go over the specifics of the Associate’s first quarter’s work. If significant changes have occurred since the original proposal was written, you might discuss updated laboratory, facility, and computing resource needs, as well as any associated training and how that will be addressed. In addition, you might encourage the Associate to develop an
inventory of any supplies, samples, software, or other resources they anticipate needing for their first round of experiments, and/or identify upcoming research-related deadlines (e.g., abstract submission dates, equipment access windows). It’s also a great time to discuss research documentation protocols, including mutual preferences and any relevant agency policies.

As the two of you discuss research start-up, remember to maintain a mentoring mindset. Be flexible and keep your objectives of fostering the Associate’s learning and independence in mind. Strive to provide guidance for the Associate’s decision-making, rather than setting the direction yourself.

Developing a Realistic Picture of Success

Helping a new NRC Associate develop a realistic picture of success is an important part of getting off to a great start. As discussed in Mentoring Guide #1, it is directly related to creating the conditions that enable research productivity. It is a great way to tie together elements of onboarding, working guidelines, and research start-up activities, and it also helps set expectations.

To put this topic in context, remember that a new postdoctoral Associate’s only significant previous research experience was very likely in graduate school. They may need help understanding what is possible to achieve in just 1-2 years. They may also need help grasping the practical aspects of delivering those achievements in a way that will appeal to potential future employers. Spell out what’s typical in terms of research output for postdoctoral Associates in your field (e.g., quantity of papers and presentations). You might also identify events or opportunities that could be especially impactful for their visibility and network building.

One way to help illustrate how a successful program unfolds is to help the Associate develop a roadmap for their tenure. An example of a simple roadmap for a postdoctoral program illustrated in Figure 1, depicts, quarterly, a two-year timeline for a generic NRC program in a federal laboratory in which the NRC Associate starts in October and conducts experimental laboratory research both internally and externally. If you choose to use such a roadmap, try starting with a sparsely populated template that you have developed yourself, then work collaboratively with the Associate to fill in the elements that are specific to their research and career interests. Refer to Appendix D: Developing a Roadmap for the Postdoctoral Program for recommendations on developing a general roadmap that works for your laboratory.

V. A Note on Building Trust and Rapport

Although most of what has been covered in the previous sections is largely practical, tactical, and easily turned into checklists, your overarching objective is to build a healthy relationship between you and your mentee. A big part of that is building trust and rapport.

Building rapport can be done through simple shared activities. Make time for informal conversations, either over coffee or while walking to a meeting or seminar. Don’t be afraid to share something personal, such as hobbies or stories from your own research experience. Try to give your mentee your undivided attention while you’re together; avoid taking phone calls,
checking texts or emails, or allowing interruptions. Signal both respect and a partnership mindset through your actions. For example, sitting side-by-side or at a table during your mentoring meetings will feel much more collaborative than having meetings “across the desk,” where you are seated in a way that conveys authority.

Building trust can take more time and patience, especially if your mentee has not had positive advising experiences in the past. Extending trust and demonstrating trustworthy behavior yourself will help cultivate trust in the relationship. One specific thing you can do is to be clear and transparent in your communication, sharing information openly. Additional behaviors that are integral to trustworthiness are being honest and forthright, meeting your own commitments, holding yourself accountable to promises you have made to others, and being clear and open about expectations. Being consistent yourself – in both word and deed – will also signal trustworthiness. Above all, be respectful, kind, patient, and always give the NRC Associate the benefit of the doubt. With time and commitment, you can develop the trust that is foundational to a successful advising relationship.

VI. Summary

In this second Mentoring Guide, we focused on the early stages of an NRC Advising relationship. We touched on cultivating a healthy advising mindset by adopting mentorship, partnership, and win-win perspectives. We covered three types of preparations to make prior to an NRC Associate’s arrival in your laboratory: preparing yourself, preparing the physical workspace and technical resources, and facilitating onboarding. Building on practices first highlighted in Mentoring Guide #1, we detailed how to clarify expectations and set working guidelines. Several important categories of topics related to expectations and working guidelines were described, as well as the Adviser’s role in working through these with a new NRC Associate. Also offered were recommended Adviser practices you might adopt. We revisited the professional development topic of planning scientific work in the context of research start-up discussions. We also touched on how you might collaborate with an NRC Associate to develop a roadmap for their postdoctoral program, clarifying expectations, and supporting skill-building in planning scientific work. The goal is to provide enough structure and clarity in the early stages of an NRC Associate’s tenure to foster their independence and help both of you build confidence in your partnership. The effort you put into building this relationship early on and the trustworthy behavior you model while doing so will help build trust and a strong foundation for a successful advising partnership.

For a deeper dive into mentoring core skills, techniques, or perspectives, please see the companion document “NRC Mentoring Guides: Resources for Self-Study.”

Comments and feedback are welcome and may be sent to Nora Beck Tan (nora@illuminaexecutive.com).

REFERENCES AND NOTES

1. Note: Throughout this document, the terms “postdoctoral researcher,” “NRC Associate,” “Research Associate,” “Advisee,” and “Mentee” will be used interchangeably to refer to the NRC Postdoctoral
Research Associates. The terms “NRC Adviser,” “Adviser,” and “Mentor” will be used interchangeably to refer to advisers of NRC Postdoctoral Research Associates, who are also expected to be mentors to these individuals.


7. Check with your agency’s HR department to explore what resources may be available or try a quick Google Images search of “onboarding plan” or “onboarding template.”


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APPENDICES

Appendix A: Adviser Pre-arrival Preparations Checklist
Appendix B: Expectations and Working Guidelines Topics
Appendix C: Contracting Discussion Template for Successful Advising Relationships
Appendix D: Developing a Roadmap for the Postdoctoral Program

FIGURES

Figure 1. Generalized example of a two-year roadmap for a postdoctoral program.
APPENDIX A: Adviser Pre-arrival Preparations Checklist

*Recommended Practice:* Use this checklist as a guide to help you prepare for a new NRC Associate’s arrival, beginning at least 3 months in advance of their start-date.

- **Self-Preparation**
  - Check with Laboratory Program Representative on NRC Adviser expectations and resources available to Advisers and Associates
  - Review agency policies and practices for NRC and postdoctoral programs
  - Review NRC’s policies and requirements for Research Associateship Programs
  - Re-read the Associate’s research proposal
  - Brush up on mentoring skills (guides, classes, advice from experienced mentors)
  - Organize schedule to maximize availability around Associate’s first few weeks on the job

- **Prepare physical workspaces and technical resources**
  - Personal workspace: desk, chair, computer station, lighting, phone, office supplies.
  - IT resources: computer, system and network access, user accounts, peripherals, software
  - Laboratory notebook (digital or physical)
  - Laboratory: access, safety training, PPE, workbench space, storage space
  - Laboratory instruments: available, operational, calibrated
  - Starting supplies: available or ordered

- **Facilitate Onboarding**
  - Relocation information: housing options, convenient communities, public transportation, temporary lodging
  - Information on local cultural, recreational, or social opportunities of interest
  - Security processes
  - Onboarding plan
APPENDIX B: Expectations and Working Guidelines Topics

Recommended Exercise: Revise the following list of topics to fit your needs, considering these questions:
- What should you add to this list to customize it for your Agency and group?
- What do you need to clarify for yourself to prepare for the arrival of a new NRC Associate?
- How and when will you address these topics?

Recommended Practice: Use your modified document as either a self-check list or to guide your discussion with a new NRC Associate.

General Expectations of NRC Associates
- Standard working hours, time away from the office/lab, closures
- Employee Code of Conduct
- Workplace norms
- Agency policies and compliance
- Other: __________________________________________________________________

Administrative Policies and Processes of Special Relevance to Postdocs (Agency and NRC)
- Laboratory: Safety, access rules, PPE, instrument usage, chem/bio handling and waste, etc.
- External publication and presentation review processes
- Intellectual property policies
- Policies and processes for purchasing equipment and supplies
- Policies and processes concerning conferences, professional training, and travel
- Performance reviews
- Eligibility and timing of pay increases for NRC Associates
- Roles of the Adviser and supervisor
- Other: __________________________________________________________________

Working Together Effectively (SEE ALSO APPENDIX C)
- Preferred work hours
- Contact information and contact method preferences
- Meeting and communication practices for different types of interactions
- What do you need from each other for your partnership to succeed?
- Other: __________________________________________________________________

Research Program Guardrails
- Boundaries or constraints on research scope
- Approvals: What is/is not required and recommended?
- How we will handle changes in research direction?
- Collaborations, side-projects, and pivots: What is/is not acceptable, what is typical?
- Our Agency’s vision, mission, and structure: Where do we fit in? How does our research fit in?
- Other: __________________________________________________________________

Career Advancement
- Career path(s) of interest
- Constraints or concerns, if any
- Post-NRC positions at our Agency - probability, typical path, when and how decisions are made
- Options for adapting the research program to the career path(s) of interest
- What Advisers can/cannot do
- Other: __________________________________________________________________
APPENDIX C:

Contracting Discussion Template for Successful Advising Relationships

Recommended Practice: Use this template to guide a conversation with your new NRC Associate advisee as part of the onboarding process.

Contact Information
- What is the preferred method of contact for each of us?
- What are the best back-up contact methods?
- Our contact information is...
- What will we hold ourselves to as a reasonable turnaround time for communications?
- How will we handle last-minute emergencies or disruptions?

Working Hours, Preferences, and Availability
- What are our standard work hours and locations?
- What are our preferred meeting times during the workday and during the week?
- How will we signal each other about times when we don’t want to be interrupted?
- How will we keep track of each other’s schedule/availability?
- Are there timeframes coming up when either of us will be unavailable for more than a week?

Meetings and Common Interactions
- How do we prefer to handle the following common types of advising interactions?
  - Quick questions
  - Research project updates and discussions
  - Career mentoring conversations
  - General professional mentorship and advising conversations
  - Discussions about technical publications, presentations, and reports
  - Other: ________________________
- What types of regular meetings will we have?
  For each type of meeting:
  - Which topics will we focus on?
  - How frequently will we meet and for how long? Where will we meet?
  - Who will initiate/set up the meetings?
- How will we handle meeting re-schedules?

Confidentiality
Confidentiality is one of the most critical elements of a mentoring relationship.
- What types of topics or conversations might we want to keep confidential? What does “keeping the conversation confidential” mean to us?
- Are there exceptions to the confidentiality rule – topics that we agree are not very sensitive or circumstances in which we give each other permission to share information with others?
- How will we signal to each other when something particularly sensitive comes up? When something that is okay to share comes up?
- Are there limits or boundaries to our confidentiality rules?
- Are there topics that are off-limits for our conversations?
Topics for our Conversations

- What is the scope of our mentoring conversations? What topics will we include?
  
  For example, research, goal-setting, career options, professional network-building, professional reputation-building, integrating work and personal life, etc.

Advice for Each Other

- General: What advice can we give each other on “how to work best with me”?
  
  For example: How do I like to learn? What do I need to be reminded about? Is there anything I think I will need extra help with? Is there anything that makes me uncomfortable or that I would like you to approach carefully? Do I have any hot buttons or pet peeves? Is there anything going on in my world, professionally or personally, that might affect our relationship?

- Feedback: What advice can we give each other about feedback?
  
  For example: What types of feedback would I most appreciate from you? How comfortable am I with giving and receiving feedback? How would I prefer to receive feedback? What has worked well for me in the past? What has not worked well?

Mutual Expectations and Relationship Health

- What are our overall expectations for this advising partnership?
- What do we expect of each other?
- What promises can we make to each other?
- To what will we hold ourselves and each other accountable?
- When will we check in on progress and effectiveness of our relationship? How will we do this? Where will we do this?
- How often will we revisit and update this contract?

Additions

- What else would we like to capture about how we will work together?
- Other than what we discussed above, are there rules of engagement that we would like to apply to our partnership?
APPENDIX D: Developing a Roadmap for the Postdoctoral Program

Recommended Exercise: Create a general roadmap for a postdoctoral program in your group. Refer to Figure 1 for an example.

A. Lay out the two-year program on a quarterly (or monthly) timeline. Map typical activities and areas of focus by the quarter (or month), including:

- Onboarding meetings
- Getting up to speed, technically
- Wrapping up grad school business
- Getting settled in the new location
- Experimental work
- Literature review
- Preparing presentations
- Preparing publications
- Adding secondary projects
- Updating the CV/resume
- Job search and interviews
- Preparing academic applications
- Program reviews

B. Add relevant milestones and events. Overlay important dates and cycles on your timeline such as:

- Required training
- Administrative and fiscal cycles
- Performance reviews and pay increases
- Important meetings within your group, division, and laboratory
- Opportunities to present work internally
- Important scientific meetings and related abstract deadlines
- Application due dates for awards or nominations
- Application due dates for extensions
- Academic application submission windows (if applicable)
- Agency/cross-agency symposia
- Visits to/from collaborators, program managers, upper management, funding agency representatives, or other VIPs
- Deadlines related to accessing resources such as proposal due dates, equipment/facility access request timelines, scheduled access windows or downtime, protocol review board meetings, etc.

Recommended Practice: Using your general roadmap as a starting point, sit down with the new NRC Associate within the first few weeks of their arrival to explain the roadmap and work together on customizing it to their program and interests. Use the initial conversation as an opportunity to answer any questions the new Associate has about the program. Encourage use of the roadmap as a planning tool, to be updated and revised as the Associate’s program progresses.
Figure 1. Generalized example of a two-year roadmap for a postdoctoral program. In this example, the Associate starts in October and conducts an experimental research program leveraging internal and external facilities.

Read from the central dark line downward for typical activities and areas of focus (Appendix D, sub-bullet A) and from the central dark line upward for milestones and events (Appendix D, sub-bullet B).