10 Easy Steps to Foster Effective Relationships with Your PIs

By Katie Droney and Rady Rogers

1 Learn to speak PI

Let's be honest: as research administrators we know what it feels like to be lost in translation when communicating with PIs. The truth is, we do speak different languages and it is critical to our success that we learn how to speak PI. Yes, that is a language! It is important to learn the unique way of communication that your PI prefers and stick to it, if you want to be heard. Clarify with them from the start their preferred form of communication and adapt to it. And even if they did not single out face-to-face interaction, don't give up on it. De-anonymize the relationship and let them know what you look like and creatively use face-to-face time to get to know them – in meetings, hallways, lunch lines, and random encounters!

2 Be realistic – once a PI, always a PI

Be realistic about your expectations. Most PIs are kind and grateful for the support we provide to their research. However, there are always going to be pain points in our relationship with them, such as meeting deadlines and negotiating priorities. Although working towards similar goals, PIs and research administrators have different interests and respond to different demands. Aspire to be effective rather than a right-fighter and utilize your knowledge, soft skills, and personality. And don't forget that you are a part of a larger community of research administrators who are always ready to help. Accept what you cannot change and focus your powers on what you can impact and improve.

3 Genuinely care about PIs' contribution to science and the world

We are lucky to work in the field of scientific and humanitarian research. Make a conscious effort to learn about the research conducted in your PI's lab, department, and school. Inevitably, you will find the honorable causes to which all research endeavors are directed and remember that you are a part of that movement. The proposals you support will lead to awards you manage, which in turn will lead to research that heals illness and improves the experience of mankind. Be proud of your participation in these efforts and always remember the goals of the research when the pre-award deadlines are unforgiving or PIs do not respond to email. Most likely they are busy "making the world a better place," in the words of a PI who always helps me get through rough patches.

4 Be proud of your knowledge and expertise

You are the PI of your trade. Do not underestimate that fact even when it feels the PIs do. We are responsible for commanding our own stage, by learning and becoming experts in our field, by being thoughtful and engaged in our supportive role to the research. Our mastery of research administration shortens the distance between the PI and their next invention or contribution to science and they will recognize it. Not all PIs are great at acknowledging the value-add of our work, but they know! Instead of focusing on external validation, foster inner pride in your contribution and command appreciation without demanding it. Appreciation may not be expressed in traditional ways, but your efforts do not go unnoticed.

5 Be assertive but prepared

One way to command respect is to have the substance to back your claims. Never stop learning, read new regulations and case studies, participate in institutional trainings, attend NCURA meetings, and simply talk with your colleagues. Your knowledge is what substantiates your assertiveness. Many PIs have strong personalities and great intellect and they respond to similar qualities in others. The most effective way to impress a PI is to be able to engage your knowledge in a constructive way and express it simply. PIs are not impressed by inflated language, but by the effectiveness and ease with which you navigate the administration of their awards to help them achieve their scientific goals. Once trust in your preparation is established, it is very hard to lose a PI's commitment to your mutual professional partnership and alliance.

6 Never say NO without offering a solution

To be effective, your knowledge of the field is best expressed in terms that are beneficial to the PI. A PI is not interested in your technical explanation as to why they cannot materialize a research idea, even if your points are valid. The PIs are the experts of the research. We are the experts of compliance. Take some time to understand the motivations or goals behind a PI's request, which may at first seem impossible. Chances are that your creativity and experience will lead you to alternative ways of reaching the same goal. That is our job and that is the fun in our job. Walk them through the maze of compliance with expert skills and arrive to a mutually acceptable destination. A sharp "no," without an offer for a solution is not only the end of the conversation but could also be the end of your relationship with your PI.

Voila! You are a research administrator hero! You have been an outstanding steward of research funding, said "no" to your PI, and said "yes" to your PI in one fell swoop. Give yourself a high five!

Working Smart in a Changing Environment

I hesitantly transitioned from a sponsored research director devoting approximately 20% effort to compliance into a full-time compliance position. I was anxious about being in the compliance space full time, anticipating constant battles, and strife with faculty.

A surprising experience resulted. A full-time role enabled me to delve more into compliance topics, cohesively, and share it confidently and effectively. I was no longer scratching the surface and feeling scripted and wedged into a limited comfort zone. It was exhilarating to methodically expand my knowledge and share it.My new role encompasses the contentious topics: export controls and safeguarding research against undue influence, conflict of interest, and research integrity. I spend more time with faculty learning about their research, and their knowledge and perspective about compliance. Not surprisingly, investigators want to be compliant but need to be shown the way. In the export control and conflicts context, if I provide a roadmap on expectations, they have a blueprint on how to respond or what questions to ask. By clearly and concisely documenting our discussions, we each have a handy reference for future use. In the research integrity space, making time at the beginning to explain the process demystifies the process and may be less anxiety producing. Being available on short notice for questions or document delivery is reassuring to all parties in what can be a life changing situation.

Because of the heightened concern about safeguarding research, I present at department meetings or in other large groups. Investigators often stop me in the hallway or while crossing campus to ask questions and get reassurance. They want the underlying details about exactly what happened at a particular institution or how NIH determined investigators were funded by both NIH and a foreign institution. They prefer to ask questions one-on-one and are more forthcoming with information.

Transitioning full-time into the compliance realm enables me to spend more quality time with faculty and develop a deeper sense of trust, satisfaction, and comradery. It is rewarding to feel like I am making a difference on the compliance side.

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7 Act as if you are on the same team (even if you're not)

Of course, we are always on the same team even when we disagree! However, an effective relationship with your PIs is based on trust that you will always facilitate their research, rather than complicate it. Apply the regulations of sponsored research without unnecessary zeal that brings a flare of bureaucracy. Regulations can be burdensome; yet our role is to help and not to burden. Take the brunt of administrative burden for the PI as much as you compliantly can and enjoy the successes that follow from this approach!

8 Blame the anonymous "they"

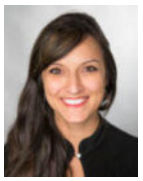
One way of achieving a sense of "team" is to play on the psychology of "us and them." At first glance it may seem a controversial and divisive approach but biases that perceive research to be at odds with administration already exist and we want to be effective in blending the two, correct? It is the name of our profession after all: research administration. No one really knows who "they" are (OSP, the sponsors, the government?) but it is not even about "them." It is about establishing a strong sense of "us" where the research administrator and the PI are on the same side.

9 Use the social currency approach

Social currency, in its extended sense, includes positive personal attributes that tend to help people succeed in interpersonal environments such as knowledge, status, intelligence, connections, looks, charm, and a sense of humor. If you have it, use it. Say hi, make small talk, share a personal story that is innocent and light-hearted, offer a piece of candy from the bowl in your office. Be inventive and creative. Be genuine and stay true to your personality. Social currency goes a long way when you inevitably make a mistake!

10 Humor and personality

Do yourself a favor – break out some humor both in stressful situations and those that are informal. If you have an inside joke, now is the time to use it! A PI will usually appreciate the laugh and it will ease some of their stress, making your administrative questions seem not so burdensome. Positive attitude, optimism, and those smiles will never steer the relationship wrong. Trust in your personality and don't be afraid to show it. Be personable because it shows your PI your capacity for empathy and our shared humanity. Before you know it, the oppositional "I vs. PI" will turn into the cooperative "I and my PI."



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