NLM/AAHSL Leadership Fellows Program

2013-2014 Report

Submitted by:

Judy Cohn, 2013-14 Chair, Future Leadership Committee
Tania Bardyn, 2014-15 Chair, Future Leadership Committee
Sandra Franklin, 2015-16 Chair, Future Leadership Committee
Carol Jenkins, Future Leadership Program Director

December 22, 2014

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NLM/AAHSL Leadership Fellows Program

2013-2014 Report

<u>Highlights</u>

This report covers the activities of the NLM/AAHSL Leadership Fellows Program in 2014. The NLM/AAHSL Leadership Fellows Program completed twelve years in 2013-2014. Successful from its beginning, the program has continued to evolve and build on that foundation to increase its impact in the profession. Its success is due in large part to the strong support of the sponsors—the National Library of Medicine and the Association of Academic Health Sciences Libraries—and to the contributions of participating fellows and mentors, faculty, and Future Leadership Committee members. The program is achieving its goal of preparing emerging leaders for director positions in academic health sciences libraries.

With a growing body of participants, AAHSL undertook an evaluation study in 2012-13 to assess the impact of the program on fellows' professional development and careers and the effectiveness of the curriculum in preparation for being a director. Fellows from the last seven completed cohorts (2005-2012) were included in the study. The Committee reviewed results and shared its preliminary recommendations with the AAHSL Board in February. Respondents were overwhelmingly positive in expressing the value of the program. The committee continues to consider suggestions from the study results. One change made with the 2015 class selection was that incoming fellows were given the opportunity to provide input to the mentor match process. Additional details on the study are included on p. 7 **(see also Appendix I).**

The 2013-14 year brought several personnel changes in the program. The curriculum takes advantage of the experience of the mentors and the expertise of faculty Kathryn Deiss and DeEtta Jones in shaping the content. Both have been with the program since its beginning. In September, following the 2013-14 Capstone, Jones decided to give up her involvement and Deiss agreed to expand her role accordingly to cover curriculum content and facilitation as needed. Earlier, in November 2013, Carol Jenkins replaced Carolyn Lipscomb as the program manager. At the same time, the AAHSL Office assumed added responsibility for managing some logistics for the program. In September 2014, Michelle Eberle (New England Region, NN/LM) relinquished her role providing technical support for Adobe Connect, and this role will be assumed by Nikki Detmar in 2015 (Pacific NW Region). These transitions have been successful, thanks to the commitment by those involved, to effective committee leadership, and especially to Carolyn Lipscomb's thorough documentation.

An important metric for evaluation of the program is the transition of fellows to director positions. As of December 2014, 27 (44%) of fellow graduates have received director appointments. During 2014, four former fellows assumed permanent director positions: Anne Seymour (Johns Hopkins U.), Gabe Rios (Indiana U.), Rose Bland (U. South Florida), and Kelly Gonzales (U. Texas Southwestern). Two fellows currently serve as interim directors: John Gallagher (Yale U., 2012-13 Fellow) and Hongjie Wang (U. Connecticut, 2014-15 Fellow). In addition, Dongming Zhang moved during his fellowship year (2013-14) to the post of Vice

President of Information Technology for the American Board of Pediatrics. Recruiters continue to draw on the program as a source for candidates. Overall, 40 of 61 former fellows (66%) have been promoted to director or other positions of higher responsibility **(Appendix A)**.

A roster of director vacancies is maintained, to augment AAHSL member surveys on vacancies. As of December 2014, there are nearly two dozen institutions with known director vacancies (including those actively recruiting, those with interim directors, and those new schools seeking LCME accreditation having not yet hired directors). These statistics show an ongoing need for the program, while the trend of new schools influences future planning.

With the incoming 2014-2015 class, 67 fellows and 57 different mentors will have taken part in the program. Well over half of AAHSL institutions have had either a mentor or fellow on staff or have hired a fellow, with many participating in more than one category. For the second time, the cohort size has been increased to include six fellows.

As noted in the report in September, 23.4% of fellow applicants and 25.5% of selected fellows have indicated minority status in the last eight years (since voluntary self-identification of ethnic or racial status was initiated). In 2014-15, for the third time a former fellow will be a mentor in the program (Heidi Heilemann, Jerry Perry, Jett McCann), an indication of the maturing of the program.

2014 is the last year of a three-year Memorandum of Agreement with NLM for partial funding of the Leadership Fellows Program. At the end of 2013 NLM agreed to provide increased funds for the program for three more years (2015-2017) in the amount of $65,000 each year. We remain very grateful for NLM's continued support, without which this successful program would not be possible.

2013-2014 Class: Year in Review

The twelfth class of fellows and mentors **(Appendix B)** participated in the program during the period from September 2013 through October 2014. Six fellows were selected from a strong pool of 16 applicants, based on their interest in pursuing a directorship in academic health sciences libraries and their record of leadership initiative and potential. They were paired with mentors who had volunteered or who were approached by the committee, taking into consideration the fellows' expressed interests for the site visit and mentor relationship and the areas of expertise and library characteristics of the mentors. The cohort consisted of six first-time mentors, one of whom, Jerry Perry, is a fellow graduate.

The cohort of fellows and mentors met together with faculty (Jones, Deiss, AAHSL Future Leadership Committee chairs and program director) at three points during the year: for a daylong Orientation in conjunction with the AAMC Annual Meeting; a half-day Leadership Institute at the MLA Annual Meeting; and a three-day Capstone. AAHSL renewed its contract with Deiss and Jones to lead the Orientation and Leadership Institute, and Jones provided facilitation for the Capstone. Fellows were also sponsored to attend the AAMC/AAHSL meetings following the

Orientation. The fellows spent two weeks on site visits to their mentors' home libraries, in addition to ongoing communication with their mentors throughout the year. Videoconference sessions were held in months when events were not scheduled. This year the cohort used the project management system Basecamp for referencing documents and for internal communication, in addition to a listserv. The **schedule of program components** is listed in **Appendix C**.

- **Orientation and AAMC meeting:** The orientation **(Appendix D)** for the 2013-2014 class introduced cohort members to one another and reviewed expectations for the program. The group completed leadership assessments (Myers-Briggs Type Indicator Form M and FIRO-B) in advance, so that results could be shared with individuals and used as the basis for a discussion of intentional leadership. Deiss met with each fellow before the meeting by telephone to debrief them on their leadership reports and to enhance their use as developmental opportunities to pursue during the program experience. The fellows and mentors were encouraged to use the profiles in setting goals as they worked on learning plans for the year. The orientation also included a discussion on how to get the most from a mentoring relationship. Time was built into the day for mentors and fellows to have one-on-one conversation and to begin to plan their work together. The group participated in an exercise on futures thinking for academic health sciences libraries. The AAHSL Board of Directors joined the class for lunch, where guidance on benefiting from attendance at the AAMC conference was shared, and Dianne Babski greeted the cohort on behalf of NLM.

- **Learning plans:** The individual fellow learning plans **(Appendix E)** are an important tool in shaping the year. In collaboration with their mentors, fellows describe three goals and outline their importance, necessary resources, and definition of success. The plans help determine the focus of the site visits and how other program components can further achievement of the goals. A fourth goal related to the leadership report is also included. Fellows share their plans with the cohort at the beginning of the year, and it is expected that plans can be modified during the course of the fellowship.

- **Virtual learning:** The Web-based curriculum (included in the schedule in **Appendix C**) allows for expanded content and connections between in-person meetings. Topics presented were: power and influence, workforce issues, enhanced library roles, managerial finance, strategic planning, diversity and inclusion, and crisis management. Mentors, along with Deiss and Jones, assumed responsibility for developing and presenting the sessions and facilitating discussion. Fellows were asked to prepare through advance assignments with the goal of preparing them to think strategically at a director level. Adobe Acrobat Connect Professional is used for the teleconferences, made available by the NN/LM, with technical assistance provided by the New England Region.

- **Leadership Institute:** The half-day Institute program on May 17 **(Appendix F)** focused on practical career guidance for fellows as they prepare for director positions. A mock interview exercise was included. Fellows were paired with a mentor other than their own and were asked to prepare to interview for the director's position, with the mentor acting as the medical school dean or other appropriate administrator. Fellows also shared their

CV and a customized cover letter with their assigned mentor. Recent fellow graduates Jennifer McKinnell and Keith Cogdill described their experiences in being appointed directors and their transition to that role. The Institute also included a guided discussion on organizational culture, the life of a director, and benefits and costs of leadership.

- **Capstone:** The 2013-2014 class met for the final time at the Capstone in Washington, DC, September 29-October 1 **(Appendix G)**. The event presented the role of organizations important to academic health centers, introduced key players, and addressed external issues shaping libraries and their implications for library directors. Representatives from ARL, NLM, NIH, AAMC, LC, NAL, IMLS, SPARC, U.S. Congress, ALA, AACN, AACP, AMIA, and AAHSL met with the group. Some of the issues crossing organizational lines were information policy and funding, scholarly communication, data management, interprofessional education, and collaboration among national libraries. Presenters included those who regularly come to the Capstone as well as some first-time speakers. Their participation seems to strengthen their relationship with AAHSL, in addition to benefiting the fellows. Jim Bothmer, as AAHSL president, joined the cohort throughout the third day to facilitate an inter-association panel and lead a discussion on the role of AAHSL.

  The Capstone format encouraged active involvement of the fellows through discussion time with the core group of fellows, mentors, and faculty to supplement the outside presentations. Mentors and other participants were assigned facilitator roles for each session, with responsibility for communicating with speakers in advance, suggesting readings, setting up the session, guiding the session, and leading a post-session discussion. Discussion periods also allowed time to reflect on the experiences of the year and post-program transition concerning the impact on fellow career paths and the opportunity for new roles in current and future positions. The Capstone included social events with the chance to spend time informally as a group. Overall, the Capstone provided the opportunity for intensive discussion and for personal meetings with significant individuals.

  The day culminated in a graduation ceremony at which Judy Cohn, DeEtta Jones, Chris Frank, Alexa Mayo, Betsy Humphreys, Donald Lindberg and Jim Bothmer made remarks. Capstone speakers and area library leaders were among the invitees. Fellows and mentors supplied names of institutional representatives and colleagues so that AAHSL could send invitations and note their completion of the program. About 45 participants and guests attended the event at the Mayflower Hotel.

- **Site visits and mentor relationships:** The site visits are the core individual activity. They provide the opportunity for fellows and mentors to spend extended time together and for fellows to experience another library environment with an emphasis on leadership at the director level. All fellows spent two weeks on site visits at their mentors' home libraries in one-week segments, with visits anchored by the fellows' learning goals. They were able to meet a range of library staff and university officials, participate in and observe library and university meetings and decision making, attend events, visit other institutions, and gain a sense of their mentors' leadership style. They also shared their

own perspective with their mentors' staff. Their reports speak to the importance of the site visits in developing relationships with their mentors, building a network of contacts, gaining ideas to incorporate in their current jobs, and expanding their vision.

- **Mentors:** The mentors continue to be the mainstay of the program. In addition to their contributions to their fellows during the site visit and the ongoing relationship, they are a part of the cohort. Their full participation in program components makes it possible for fellows to be exposed to additional leadership styles and areas of expertise. They play a role in developing content and facilitating the videoconference sessions, as well as facilitating Capstone sessions. Mentors expressed that they benefit from the program as well and appreciate the opportunity to reflect and to learn from the cohort. The committee leadership also participated in the program components, supplying additional perspective as directors and former mentors.

The **summary evaluations from fellows and mentors** are attached as **Appendix H.** Overall, they speak very highly of their experience and the perceived value of the program. The Future Leadership Committee will be considering changes and refinements based on the annual evaluation as well as continuing to examine the results of the comprehensive evaluation study.

All Classes

Under contract to AAHSL, Nancy LaPelle, PhD, designed and conducted a qualitative evaluation study in 2012-13 in collaboration with the committee. It consisted of two parts: a questionnaire sent to all fellows from the last seven completed cohorts (2005-2012) and individual telephone interviews with the fellow graduates from these cohorts who held AAHSL director appointments when the study began. The survey focused on the impact of the program on professional development and careers, and 33 of 35 of eligible fellows responded to the survey. Thirteen interviews were conducted with fellows in director positions to ask about the impact of the program in obtaining a position and carrying out the director role. The study complemented the earlier 2007 evaluation funded by NLM, as it followed succeeding cohorts. It took advantage of the maturing of the program with a group of fellows who could assess the needs of a director and the usefulness of the program design and curriculum as preparation.

The committee reviewed the results and submitted an executive summary and recommendations to the AAHSL Board in February, 2014. It posed two questions: 1) how well does the Fellows Program meet AAHSL's and NLM's goals for leadership development, and those of participants; and 2) how can the Program be improved? The data presented earlier suggest that the Program is having a significant impact on placing well qualified leaders in directors' positions, and the number of vacancies suggests an ongoing need. The Program continues to get high marks from participants, and AAHSL is committed to using feedback from graduates and others to improve it. The changes made in 2014 to creating the fellow-mentor pairs; and increasing the class size are two examples.

The program continued its effort to build connections among program classes. The annual reunion of all former and current fellows and mentors occurred at the MLA Annual Meeting in

Chicago at the Hard Rock Hotel, with about 65 attending. The reunion is one way to develop a long-term community across cohort lines among the participants in the program. This may become more challenging as the total numbers continue to increase. In addition, all classes are connected via a listserv.

Individual mentors and fellows and cohorts also report staying in touch with one another and offering career advice. The committee has worked to encourage ongoing career support for fellows in previous classes. Targeted individual coaching with Deiss is available on an as-needed basis, which the committee identifies and approves.

New mentors met with committee leadership during the AAMC Annual Meeting in Chicago (2014) for a Mentors Orientation to share their experiences and expectations. Topics included learning goals, site visits, communication with the fellow, relationship with the cohort, support for mentors, impact on mentors, impact on staff, and the role of mentors in supporting program graduates.

Goals

For the upcoming year, we aim to maintain the strength and diversity of candidate pools and the cohort; continue to implement improvements based on evaluations; continue to enhance program content and design, focusing on improving the effectiveness of virtual sessions and expanding the face to face time via the Institute; facilitate cohort cohesion; examine means for assisting former fellows in their career progression; and continue to assess the ladder of leadership development programs culminating in the Leadership Fellows Program. In related efforts we also hope to improve marketing of the Leadership Fellows Program, post director vacancy announcements on the AAHSL web site, and collaborate with other library leadership programs via participation in the Nexus II Project.

AAHSL expresses its gratitude and appreciation for the ongoing collaboration with NLM in making this program possible. NLM's involvement, through guidance and participation in program events as well as its contribution of financial support, is a key success factor. We look forward to continuing the relationship in the future.

Submitted by:

Tania Bardyn, Chair, 2014-2015
Sandra Franklin, Chair Designate, 2015-2016
Judith S. Cohn, Immediate Past Chair

Carol G. Jenkins,
Future Leadership Program Director
AAHSL Future Leadership Committee

12/16/14

Promotions of Fellows in NLM/AAHSL Leadership Fellows Program

Directors

Judy Consales (2002-2003 class)   11/1/03
Associate University Librarian for Sciences
Director, Louise M. Darling Biomedical Library
NN/LM Pacific Southwest Region
University of California, Los Angeles
(earlier promotions: Director; Associate University Librarian for Life and Health Sciences)
        Mentor: Carol G. Jenkins

Linda J. Walton (2002-2003 class)   8/31/06
Associate University Librarian and
Director, Hardin Library for the Health Sciences
University of Iowa
        Mentor: Wayne J. Peay

Gerald (Jerry) J. Perry (2002-2003 class)   3/07
Director
Health Sciences Library
University of Colorado Denver
(earlier promotions: Deputy Director; Interim Director)
        Mentor: Nancy K. Roderer

Charles J. Greenberg (2002-2003 class)   12/2/13
Founding Library Director
Wenzhou-Kean University Library
        Mentor: J. Michael Homan

Brian P. Bunnett (2003-2004 class)   12/1/08
Director, Library and Education Services
Health Sciences Library and Informatics Center
University of New Mexico
(resigned 2013; currently Chair, Public Services Department, Cunningham Memorial Library,
Indiana State University)
(earlier promotion: Deputy Director of Libraries, University of Texas Southwestern Medical
Center at Dallas)
        Mentor: Lynn Kasner Morgan

Judy Burnham (2004-2005 class)   6/19/07
Director
Biomedical Library
University of South Alabama

(earlier promotions: Associate Director; Interim Director)
> *Mentor: Brett Kirkpatrick*

Jett McCann (2004-2005 class)   3/1/07
Director, Dahlgren Memorial Library
Associate Dean for Knowledge Management
Georgetown University Medical Center
> *Mentor: Patricia Thibodeau*

Beth Layton (2004-2005 class)   8/10/09
Director, Oliver Ocasek Regional Information Center &
the Northeast Cooperative Regional Library Depository
Northeast Ohio Medical University
(earlier promotion: Interim Director, Health Science Center Libraries, University of Florida)
> *Mentor: William Garrity*

Teresa L. Knott (2005-2006 class)   3/10/09
Director
Tompkins-McCaw Library for the Health Sciences
Associate University Librarian, VCU Libraries
Virginia Commonwealth University
> *Mentor: Karen L. Brewer*

Nadine Dexter (2006-2007 class)   4/28/08
Director
Harriet F. Ginsburg Health Sciences Library
University of Central Florida College of Medicine
> *Mentor: Holly Shipp Buchanan*

Christopher (Chris) J. Shaffer (2006-2007 class)   8/1/08
University Librarian
Oregon Health & Science University
> *Mentor: Paul Schoening*

Colleen Cuddy (2007-2008 class)   9/1/10
Director
Samuel J. Wood Library
& C. V. Starr Biomedical Information Center
Weill Cornell Medical College
(resigned 2013)
(earlier promotions: Associate Curator/Deputy Director; Interim Director, New York University
School of Medicine)
> *Mentor: Judith Robinson Mercer*

Heidi Heilemann (2007-2008 class)   8/1/08
Associate Dean for Knowledge Management, Director

Lane Medical Library & Knowledge Management Center
Information Resources & Technology (IRT)
Stanford University Medical Center
Mentor: Nancy Roderer

Neville Prendergast (2007-2008 class)   1/12/09
Director
Rudolph Matas Library of the Health Sciences
Tulane University
Mentor: Carol G. Jenkins

Laura K. Cousineau (2008-2009 class)   1/16/12
Director, Biomedical Libraries
Dartmouth College Libraries
Mentor: Gail Yokote

Melissa L. Just (2008-2009 class)   8/10/09
Director
Biomedical Library
University of California, San Diego
(resigned 2012; currently Associate University Librarian for Research and Instructional Services,
Rutgers University Libraries)
Mentor: Cristina A. Pope

Sandra I. Martin (2008-2009 class)   12/12
Director
Shiffman Medical Library
Wayne State University
Mentor: Gary Freiburger

Irma Quiñones (2009-2010 class)   2009
Director
Conrado F. Asenjo Library
Medical Sciences Campus
University of Puerto Rico
Mentor: Judith S. Cohn

Debra C. Rand (2009-2010 class)   2009
Associate Dean and Director of Health Sciences Libraries
Hofstra North Shore-LIJ School of Medicine
Long Island Jewish Medical Center
North Shore-LIJ Health System
Mentor: Laurie L. Thompson

Tania P. Bardyn (2010-2011 class)   11/7/11
Associate Dean of University Libraries

Director, Health Sciences Library
Director, NN/LM Pacific Northwest Region
University of Washington
   Mentor: Julia F. Sollenberger

Keith Cogdill (2010-2011 class)   10/9/11
Director
Division of Library Services
National Institutes of Health
   Mentor: Cynthia L. Henderson

Deborah Sibley (2010-2011 class)   7/12
Director of Libraries
Louisiana State University Health Sciences Center, New Orleans
   Mentor: Brett Kirkpatrick

Jennifer McKinnell (2011-2012 class)   5/27/13
Director of the Health Sciences Library
McMaster University
   Mentor: Cynthia Robinson

Anne Seymour (2006-2007 class)   2014
Director of the Welch Medical Library
Johns Hopkins University
   Mentor: Elizabeth Eaton

Gabriel Rios (2003-2004 class)   2014
Director of the Lilly Medical Library
Indiana University
   Mentor: Karen Butter

Rose Bland (2012-2013 class)   2014
Director of the Shimberg Library
University of South Florida
   Mentor: Kathryn Carpenter

Kelly Gonzales (2010-2011 class)   2014
Director of the Medical Center Library
University of Texas Southwestern Medical School
   Mentor: Barbara Epstein

Other Promotions

Patricia (Pat) C. Higginbottom (2002-2003 class)
Associate Director for Public Services
Lister Hill Library of the Health Sciences

University of Alabama at Birmingham
> *Mentor: Judith Messerle*

Nancy J. Allee (2003-2004 class)
Deputy Director, Health Sciences Libraries
University of Michigan
> *Mentor: T. Scott Plutchak*

Gabriel (Gabe) R. Rios (2003-2004 class)
Deputy Director
Lister Hill Library of the Health Sciences
University of Alabama at Birmingham
(earlier promotion: Associate Director of Public Services, Briscoe Library, University of Texas
Health Science Center at San Antonio)
> *Mentor: Karen A. Butter*

Cynthia (Cindy) L. Stewart (2003-2004 class)
Associate Director
Dartmouth College Biomedical Libraries
(earlier promotions: Associate Director/ Clinical, Research, and Education Services; Acting Co-
Director)
> *Mentor: James Shedlock*

Francesca (Fran) Allegri (2005-2006 class)
Head of User Services
Health Sciences Library
University of North Carolina at Chapel Hill
(earlier promotion: Associate Director for External Relations)
> *Mentor: Gail A. Yokote*

Jane Bridges (2005-2006 class)
Associate Director – Savannah Campus
Health Sciences Library
Memorial University Medical Center
> *Mentor: Laurie L. Thompson*

Nancy Hrinya Tannery (2008-2009 class)
Senior Associate Director
Health Sciences Library System
University of Pittsburgh
> *Mentor: James Shedlock*

Heidi M. Nickisch Duggan (2009-2010 class)
Acting Director, Galter Health Sciences Library
Feinberg School of Medicine
Northwestern University

Mentor: Dorothy A. Spencer

Bart Ragon (2009-2010 class)
Associate Director for Knowledge Integration, Research, and Technology
Claude Moore Health Sciences Library
University of Virginia
Mentor: Elaine Russo Martin

Keir Reavie (2009-2010 class)
Head, Health, Agricultural, and Biological Sciences Library Services
Shields Library
University of California, Davis
(currently Associate Director, John Cotton Dana Library, Rutgers-Newark)
Mentor: Eric D. Albright

Shannon D. Jones (2011-2012 class)
Assistant Director for Program Development and Resource Integration
Medical University of South Carolina Library
Mentor: R. Kenny Marone

Jeffrey D. Williams (2011-2012 class)
Associate Director, Research and Education Services
Health Sciences Libraries
New York University
Mentor: A. James Bothmer

Dongming Zhang (2013-2014 class)
Vice President for Information Technology
American Board of Pediatrics
Mentor: Gerald Perry

Rev 12/15/14

Appendix B
2013-2014 Roster of Fellows and Mentors

Debra R. Berlanstein
Associate Director, Hirsh Health Sciences Library, Tufts University
> *Mentor: Thomas G. Basler*
> Director of Libraries and Learning Resource Centers and Chair, Department of Library
> Science and Informatics
> Medical University of South Carolina

Renée Bougard
National Network of Libraries of Medicine Outreach Librarian, National Library of Medicine
> *Mentor: Pamela S. Bradigan*
> Assistant V.Pres., Office of Health Sciences and Director, Prior Health Sciences Library
> Ohio State University

Tara Douglas-Williams
Division Head for Information Services/Library Manager
Morehouse School of Medicine
> *Mentor: Barbara Bernoff Cavanaugh*
> Associate Director, Health Sciences Libraries and Director, Biomedical Library
> University of Pennsylvania

Deborah L. Lauseng
Assistant Director, Academic and Clinical Engagement
Taubman Health Sciences Library
University of Michigan
> *Mentor: Anne M. Linton*
> Director, Himmelfarb Health Sciences Library
> George Washington University

Alexa Mayo
Associate Director for Services
Health Sciences and Human Services Library
University of Maryland
> *Mentor: Christine D. Frank*
> Library Director
> Rush University Medical Center

Dongming Zhang
Vice President for Information Technology
American Board of Pediatrics
> *Mentor: Gerald J. Perry*
> Director, Health Sciences Library
> University of Colorado Denver

Appendix C

NLM/AAHSL LEADERSHIP FELLOWS PROGRAM
2013 - 2014 CURRICULUM TIMELINE (rev03/26/14)

October 31, 2013	Cohort orientation (Philadelphia, PA)	Kathryn Deiss DeEtta Jones
November 2, 2013	Mentor orientation (Philadelphia, PA)	Mentors
November 2013- August 2014	Site Visits	

January-August 2014
Site visits to mentors' libraries of two weeks total duration occur during this time.
Virtual sessions are 3rd Wednesday of each month:

January 15 3:00-4:30 ET	Journal Club: Power and Influence	Tom Basler
February 19 3:00-4:30 ET	Journal Club: Workforce Issues	Pam Bradigan
March 19 3:00-4:30 ET	Journal Club: Enhanced Library Roles	Barbara Cavanaugh
April 16 3:00-4:30 ET	Journal Club: Managerial Finance	Chris Frank
May 17 (Saturday) 12:30-5:00 CT	Leadership Institute (at MLA Annual Meeting, Chicago,IL): Career Guidance	Kathryn Deiss DeEtta Jones
June 18 3:00-4:30 ET	Journal Club: Strategic Planning/Space	Kathryn Deiss Jerry Perry Melissa DeSantis
July 16 3:00-4:30 ET	Journal Club: Diversity and Inclusion	DeEtta Jones Jerry Perry
August 20 3:00-4:30 ET	Journal Club: Crisis Management	Anne Linton
Sept 29 – Oct 1	Capstone and graduation (Washington, DC)	speakers TBA

Appendix D

NLM/AAHSL Leadership Fellows Program

Philadelphia Marriott Downtown, Room 303
Thursday October 31, 2013
8:30 am- 5:00 pm

Orientation Agenda
Facilitators: Kathryn J. Deiss and DeEtta Jones

8:30 am	Continental Breakfast Program Overview and Introductions
9:30-10:00 am	Facilitated discussion

- How do we want to shape this program experience to meet our unique individual and group needs?
- How will we contribute to the learning?

10:00 am	Intentional Leadership Putting leadership in a personal context
10:30 am	*Break*
10:45am-11:45	Crafting Personal Vision
Noon-1:00 pm	*Lunch*
1:00-3:00 pm	The Future of Academic Health Sciences Libraries

- Identifying emerging issues and needs
- Understanding the environment
- Criteria for action

3:00-3:15 pm	*Break*
3:15-4:30 pm	Getting the Most from Your Mentoring Relationship

- The Helping Relationship
- Learning Plan
- One-on-one time with mentors

4:30-5:00 pm	How to Make the Most of Your AAMC Experience
5:00 pm	Adjournment

Appendix E - LEARNING PLANS

FELLOW/MENTOR LEARNING PLAN

Name: Debra Berlanstein   Date: November 21, 2013

Select four learning goals that you, as a Fellow and a Mentor, think are important to pursue during the course of this Program. After you have listed each goal, detail why it is important to you, what resources you will need to accomplish it, and the measure of your success.

Please try to frame the objectives according to the Leadership Fellows Program's intended outcomes. The Program is designed to:

- Introduce fellows to leadership theory and practical tools for implementing change at organizational and professional levels;
- Introduce fellows to critical issues facing academic health sciences libraries;
- Develop meaningful professional relationships between fellows and mentors that give fellows access to career guidance and support;
- Expose fellows to another academic health sciences library and its institutional leadership under the guidance of their mentors;
- Examine career development and provide models of directors to fellows;
- Create a cohort of leaders who will draw upon each other for support throughout their careers;
- Promote diversity in the leadership of the profession;
- Offer recognition to emerging leaders and enhance the competitive standing of fellows as they pursue director positions.

Learning Goal 1

I would like to learn more about:

Developing a relationship with our hospital in a setting where we are constrained by separate economic entities.

This learning goal is important to me because:

They are a large part of our user population and we need to develop more outreach to them. In addition, we are hoping to gain more complete economic support from them to underwrite the expensive resources of ours that they use heavily.

In order to accomplish this goal I will need:

Mentor to share his vast experience and learn from his staff about the innovative way they have developed the relationship they have with their hospital.

My definition of success is:

Beginning an outreach program and hopefully putting forth a memorandum of understanding with the hospital administration.

Learning Goal 2

I would like to learn more about:

Effectively bringing together the library staff to create a strategic plan for the library. This would involve developing good communication strategies and a structure to develop the plan so it aligns with the University's new T10 strategic plan.

This learning goal is important to me because:

The University has recently released their new strategic plan. The library has never really created their own plan and this seems a perfect time to develop our mission statement, goals and an overall plan that aligns with the University. It will also give department heads a structure with which they can plan their departmental goals.

In order to accomplish this goal I will need:

Background reading as well as mentor's input about the best way to start organizing the staff, e.g. management retreat, library wide staff meeting, committees, etc.

My definition of success is:

To have the beginnings of a structure and to start the process sometime in the next year.

Learning Goal 3

I would like to learn more about:

Improve my budgeting skills and develop a better understanding of how to make the process my own using available tools (Excel). This includes how to best create accurate projections and calculate for the next fiscal year effectively.

This learning goal is important to me because:

This is a large component of my current position. I stepped into it with minimal training and background and have learned on the job using the structure put in place by my predecessor. After an entire budget cycle I am more confident, but definitely need more coaching on making the process clear and organized.

In order to accomplish this goal I will need:

Specific training and input from Mentor's staff member with extensive experience as well as overarching concepts from the Mentor about what is important to consider when creating a projection and a budget.

My definition of success is:

A sense that my system is working for me and I know exactly what I need to do and how to get it done efficiently.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

How do your behavioral and thinking preferences help you lead?

Looking at your Leadership Report, identify three things you would like to learn more about, create actions around, or *actively* reflect on (as in journaling, for instance):

1. Develop the ability to manage conflict effectively with confidence.

2. Time management of the varied parts of my job that includes budgetary responsibility, everyday library operations and supervision.

3. Developing a more proactive approach to difficult larger tasks rather than reacting to a deadline. This is related to #2 above.

NLM/AAHSL Leadership Fellows Program

Fellow/Mentor Learning Plan

Fellow: Renée Bougard
Mentor: Pam Bradigan

Date: 20 November 2013

Learning Goal 1

I would like to learn more about: Institutional Culture and Politics and Library Culture

This learning goal is important to me because: Successful libraries are often dependent upon the recognition of the Director an administrator within the institution. All administrators must learn to navigate institutional culture and politics to be successful within the institution. The academic health science library's culture is often shaped by the Director and/or the Library's department heads.

I am interested in learning the successes and challenges of navigating the politics of the institution. I am interested in learning about the Director has shaped the library culture during her tenure.

To accomplish this goal, I will need:

Mentor:

Identify and introduce Ohio State University (OSU) culture shaping and leadership expectations, training opportunities, and the Health Sciences Library (HSL) organization practices. Identify and establish appropriate external and internal experiences for Fellow.

Both:

In advance of visit review and discuss OSU documentation and background information.

Fellow:

- To learn about the recent history of my mentor's library, including where the library is positioned in the institution, who my mentor reports to, advantages and challenges of the library's position within the organization, institutional champions of the library, etc.
- To attend institutional/organizational administration/management meetings with my mentor, and have an opportunity to discuss observances, etc.
- To learn how my mentor has shaped the library's culture, challenges and successes
- To meet with library staff who help to shape the library's culture
- Journal Clubs: Power and Influence and Crisis Management – readings and discussion

My definition of success is: I will be able to identify the elements of culture and politics that affect the library, and have an opportunity to further discuss with my mentor. I will gain a better understanding of shaping the library's culture and how implementing change affects staff.

Learning Goal 2

I would like to learn more about: New Roles for Library Staff

This learning goal is important to me because: Assessment and planning may result in new roles for librarians to meet institutional needs, as well as new/changing library priorities.

I am interested in learning about emerging new roles for library staff and how libraries support library staff in gaining new skills to meet these new roles.

To accomplish this goal, I will need:

Mentor:

Identify library leaders within the organization who investigate and identify new library roles, plan and implement. Plan appropriate experiences in this area for Fellow which includes discussion on organizational change; professional development and training for all staff; and strategic planning.

Both:

Review recent literature on topic and also discuss recent changes at OSU in advance of Fellow visit.

Fellow:

- To meet and discuss with my mentor and library staff who:
  - have identified new/emerging roles for library staff; trends; training/skill sets; etc.
  - staff who have recently assumed new/emerging roles, and possibly institutional staff who may be directly involved in/benefiting from these new roles/assignments
- Readings on academic health sciences institutions, identifying challenges and needs where librarians may be able to play a role in meeting these needs
- Monitoring job ads to identify new roles for librarians
- Journal Clubs: Workforce Issues and Enhanced Library Roles – readings and discussion

My definition of success is: I will learn more about identifying the information needs and challenges in academic health sciences institutions, and identifying where librarians may be able to play a role in meeting these needs. I will have an opportunity to learn and discuss how to prepare and support librarians for these new roles.

Learning Goal 3

I would like to learn more about: Assessment and Planning of Services

This learning goal is important to me because: Assessing the needs of the schools/colleges the library supports is required for the library to remain vital within the organization. As a result, library staff must plan to support the identified needs.

I am interested in learning about how libraries assess, plan, and prioritize.

To accomplish this goal, I will need:

Mentor:

Identify various methods OSU HSL uses in assessing individual staff, library faculty, services, collections, resources, and overall Library performance.

Both:

Identify the OSU HSL history in this area, look at current practices and identify areas for improvement.

Fellow:

- To learn how needs assessment and planning are conducted in my mentor's library
- To meet and discuss with library staff who have a role in assessment and planning
- Readings on academic health science library approaches to assessment and planning
- Journal Club: Enhanced Library Roles – readings and discussion

My definition of success is: I will learn about formal and informal methods of library assessment and planning to meet the needs of the institution.

Learning Goal 4

I would like to learn more about: Library Budgets and Fundraising

This learning goal is important to me because: Budgets are an integral component of library administration. Many libraries are experiencing flat or decreased budgets, and are exploring external funding sources to bridge the gap.

I am interested in learning how libraries prepare budgets, the decision process for budgeting in the various areas of the library and budget, how library priorities and budgets align, and how the budget is presented and/or negotiated within the organization.

I am also interested in learning how libraries identify external sources of funding, e.g. through Friends groups, grants, etc.

To accomplish this goal, I will need:

Mentor:

Library Administrator and Mentor to develop the Library budget basics for the Fellow. Also include funding opportunities or models as well as current challenges.

Both:

Will work together to determine the amount of information desired in various budget areas and then identify OSU HSL experts to meet with on Fellow visit. Examples might include meeting with Development team, Collections lead, Earnings unit leads.

Fellow:

- My mentor to:
    - explain how budget planning and preparation take place in the institution and library throughout the fiscal year;
    - discuss the more challenging areas of budgeting and possible solutions;
    - discuss approaches to and examples of fundraising, including successes, challenges, and institutional guidelines in relation to fundraising
- To meet and discuss with library staff who participate in budget planning and/or preparation, and their roles and approaches in the process
- To meet and discuss with library staff who participate in fundraising
- To meet and discuss with institutional staff who work with the library on fundraising efforts
- Readings on library fundraising
- Journal Club: Managerial Finance – readings and discussion

My definition of success is: I will learn about the lifecycle of the library budget in an academic health sciences institution, including planning, preparation, challenges, and possible solutions. I will learn about approaches to fundraising in an academic health science library setting.

Name: Dongming Zhang   Date: November 21, 2013

Learning Goal 1

I would like to learn more about:

In light of changes in the health care environment and particularly in the library, what is now meant by knowledge management?

This learning goal is important to me because:

The health library and librarianship need to be transformed to position themselves to meet the challenges due to the changes of health care environment and increasingly developed digital technologies. Understanding what the knowledge is and its management in health library setting, and developing the strategies, in line with the institutional missions, to achieve the goals through the knowledge management provides one important service frontier toward the direction for the future library.

In order to accomplish this goal I will need:

- Activity: Literature review on knowledge management (its evolving meaning, and who is operating in this sphere (boundaries of engagement among/between professions)).
- Activity: Strategic interviews with select AAHSL past leaders re: knowledge management initiatives.
- Activity: Survey of health sciences librarian knowledge management roles.
- Activity: Appreciative inquiry interviews with a few key individuals engaged in such roles, to gain their perspective.

My definition of success is:

I will be able to identify elements of knowledge management in health library and health environment that the library serves. Be able to suggest possible action steps in the library management context.

With my mentor, I will be able to identify several possible projects for both short and long terms.

Learning Goal 2

I would like to learn more about:

What is the strategic relationship between libraries and information technology as services and enabling enterprises?

This learning goal is important to me because:

Today in the digital world, the academic library and it services are heavily depending on information technology to provide services and have the special relationship with information technology. Many libraries have their own IT departments and are closely collaborating with campus IT to improve services.

In order to accomplish this goal I will need:

- Activity: Interview with Russ Poole, Chief Information Technology Officer, University of Colorado Denver; Russ is leading a reorganization of IT at CU Denver and is presently implementing a new governance infrastructure for decision-making and priority setting throughout the University.
- Activity: Interview with Associate Vice Chancellor for Academic Resources and Services Dr. Regina Kilkenny. Dr. Kilkenny co-led the effort to "reinvent" IT governance at CU Denver and is the officer in the Office of the Provost to whom the CU HSL Director reports.
- Activity: Spend a day shadowing Pat Burns, Dean of Libraries and Vice President of Information Technology, Colorado State University.

My definition of success is:

I will be able to gain understanding and insight from the leadership of campus IT on how to collaborate with libraries from their perspectives, and combining with my JHU's experience to find effective way to build good working relationship with IT and approach IT when the collaboration is needed.

Learning Goal 3

I would like to learn more about:

Emerging development, fundraising and engagement responsibilities of the library dean/director: funding the resources to lead strategic change.

This learning goal is important to me because:

Being a health library director, it's very important to engage with the university librarian/dean and keep constant connection with his/her colleagues from other academic directors. The

purposes are to promote their visions and long term goals and convince and gain the support from the library dean and directors to their development and fundraising plans.

In order to accomplish this goal I will need:

- Activity: Literature review.
- Activity: Interviews with Nancy Ives, CU Anschutz Medical Campus Development Officer and liaison to the CU HSL; and with Cheryl Kisling, Lead Development Officer, CU Anschutz Medical Campus.

My definition of success is:

I will be able to identify a few effective strategies to approach this important task, including key people identification, relationship cultivation, vision communication, timing, and organization culture. I will try to apply what I learned to JHU situation.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

How do your behavioral and thinking preferences help you lead?

Looking at your Leadership Report, identify three things you would like to learn more about, create actions around, or *actively* reflect on (as in journaling, for instance):

1. Learn more about inclusion behavior and how it would help improve the team chemistry and improve the professional environment: in the monthly staff meeting, more emphasize on discussing those small projects that bring in big changes to our services and programs, instead of always spending time on large influential and high-profile projects. (The team has about 20 + staff)

2. Learn more about communicating to staff on strategic thinking and vision, instead of more focus on current projects and works. In the annual review with individual staff, connecting individual staff's daily work and projects to the strategic goals and vision. I think it would improve the productivity and services when staff members have their senses of participation.

3. The peers within the library and SOM are important stakeholders in many of my projects and I would like to learn more about communicating to peer directors within the library and directors within SOM on my strategic thinking and vision, and moreover, to understand their needs and concerns.   I will try to have monthly "one on one" meeting with them and build collaborative projects and programs. I think it would improve the relationships and gain necessary support from them.

FELLOW/MENTOR LEARNING PLAN
Name:Deborah Lauseng   Date: November 22, 2013

Fellow: Deborah Lauseng, Assistant Director, Academic and Clinical Engagement, Taubman Health Sciences Library, University of Michigan
Mentor: Anne Linton, Director, Himmelfarb Health Sciences Library, George Washington University

Learning Goal 1: I would like to learn more about models and roles of reporting structures (organizational and financial) of an academic health sciences library director within both private and public institutions.
This learning goal is important to me because it will expand my understanding of organizational and financial structures within private and public institutions and the corresponding benefits and challenges.

In order to accomplish this goal I will need:
    Mentor: will review internal documents related to service agreements and budget negotiations with three schools served. She will share information with mentee regarding data gathered to create this service model and compare with preceding model.
    Fellow: to be engaged in appropriate meetings during the site visits to George Washington University (GW), as well as to Howard University and Georgetown University (GU); and to participate in debriefing sessions with my mentor.
    Both: to identify and discuss case studies that explore the different reporting structure roles/models within an academic health sciences library environment.

    My definition of success is to be able to describe at least three types of reporting structures and list some the benefits and challenges unique to each structure, as well as identify those benefits and challenges in common regardless of reporting structure.

Learning Goal 2: I would like to learn more about the appropriate use of assessment to inform library administration (and staff) for strategic planning on current or new library programs and services.

This learning goal is important to me because assessment is important to measuring the worth of a unit or service within the larger organization, and guides decision-making in times of transitions, budgetary constraints, and technological change.

In order to accomplish this goal I will need:
Mentor: will structure visit to review assessment activities at own institution, help with literature review to identify new means of assessment, explore ways to assess faculty scholarly output and impact of library support, review matching assessment tool to specific purpose/data needed.
Fellow: to be engaged in appropriate meetings during the site visits to George Washington University (GW), as well as to Howard University and Georgetown University (GU); and to participate in debriefing sessions with my mentor.
Both: to identify and discuss literature on use of assessment for library services and strategic planning, to be able to identify and evaluate a variety of assessment strategies for library services, programs and value.

My definition of success is being able to outline a potential assessment project to inform the creation of a new or continuation of an existing library program or service.

Learning Goal 3: I would like to learn more about successful communication methods, across all levels of library staffing as well as with library clientele, within change management environment.

This learning goal is important to me because I continue to hear about and see issues with communication (or lack of communication) within a variety of academic settings. Gaining an understanding of successful communication methods/mechanisms will be beneficial in all areas of my professional work. This goal relates directly to the previous goal since strong communication skills are needed to implement new programs and services identified through assessment.

In order to accomplish this goal I will need:
Mentor: to review strengths and weakness of her personal communication style and assist with a literature review of communications styles—particularly team communication and communication styles of leaders, include the School of Marketing and Communications staff in the site visit agenda
Fellow: to be engaged in appropriate meetings during the site visits to George Washington University (GW), as well as to Howard University and Georgetown University (GU); and to participate in debriefing sessions with my mentor.
Both: to identify and discuss literature on best practices on communication within change management environments.

My definition of success is being able to describe at least three best practices in communication practices as well as any associated cautions.

Learning Goal 4: based on Leadership Report from MBTI and FIRO-B
How do your behavioral and thinking preferences help you lead? From the Leadership Report, identify three things you would like to learn more about, create actions around, or actively reflect on:

1: From Leadership Report: *Your independent nature and need for privacy may be misconstrued by others as indifference, moodiness, or even conceit.*
Proposed Action/Reflection - Develop method of clearly communicating/expressing my availability and openness to input even though I tend to work independently.

2: From Leadership Report: *Others may perceive you as unyielding or unapproachable, overly critical, and impersonal. You may wish to seek ways to solicit feedback and suggestions and show appreciation for others.*
Proposed Action/Reflection - explore ways of soliciting feedback and suggestions from others (individually or from a group) and communicate when working independently (not unapproachable, overly critical or impersonal)
3: From Leadership Report: *Proactively explore methods for providing a more clear and steady sense that you are leading everyone in the same direction.*
Proposed Action/Reflection – Explore strategies for clear communication in a variety of settings and situations, and develop methods for personal use in team building, collaborative work skills, building trust, open door policies, etc.

NLM/AAHSL Leadership Fellows Program 2013-2014
Fellow/Mentor Learning Plan
Fellow: Alexa Mayo
Mentor: Chris Frank
November 21, 2013

LEARNING GOAL 1

I would like to learn more about:

      Developing and administering a budget

This learning goal is important to me because:

Although I have experience in managing budgets for funded projects, I do not have experience in working with budgets on a larger scale. This goal is important to me as any position that I advance to will require experience and knowledge in managing a library budget. Within the HS/HSL, the Associate Director for Business Operations handles budget development and monitoring. I am looking for opportunities to develop in this area.

In order to accomplish this goal I will need:

Mentor: To provide my Fellow with background information on budgeting within the Library of Rush University Medical Center. She will accompany me to any budget meetings that might occur during her on-site visits

Both: To identify issues and questions for discussion.

Fellow: To work with the HS/HSL Associate Director for Business Operations to develop an understanding of budgeting within the library. Participate in HS/HSL budget meetings.

My definition of success is:

I will be able to identify components of a budget, know concepts and terminology to use in discussing and problem solving around budgets, and be able to apply best practices in budget development and management.

LEARNING GOAL 2

I would like to learn more about:

Organizational culture at an academic health sciences library at a private university

This learning goal is important to me because:

I have experience in a large, publically funded, academic health sciences library that is part of a state-wide system. I am eager to contrast the work profile of a smaller, private library with the organizational culture of a large state-funded library. It is important to me to understand the challenges and opportunities within each setting as I weigh professional opportunities outside of my current library environment.

In order to accomplish this goal I will need:

Mentor: To provide my Fellow with background information on the environment at Rush University Medical Library and its parent institution. She will accompany me to meetings that are representative of the private university/medical center environment

Both: To identify issues and questions for discussion.

Fellow: To attend meetings of the Rush University Medical Center Library management teams, and if appropriate, with others at Rush University. Follow up these meetings with debriefing sessions.

My definition of success is:

I will be able to contrast private and public academic health sciences centers and understand organizational, work priorities and challenges in each type of library.

LEARNING GOAL 3

I would like to learn more about:

How libraries work with their medical centers including the resources and services libraries provide and the financial support they receive.

This learning goal is important to me because:

The HS/HSL's relationship with the University of Maryland Medical Center is undergoing a change.   I am eager to provide leadership in developing a successful model for this new relationship.

In order to accomplish this goal I will need:

Mentor: To provide my Fellow with background information on the medical center/library model at Rush University Medical Center Library. She will accompany RUMC Library staff to relevant clinical meetings during her on-site visit.

Both: To identify issues and questions for discussion.

Fellow: To reach out to colleagues to gather information from them about how their libraries work with their medical center.

My definition of success is:

I will be able to identify components of a successful library/hospital relationship that includes delivering services, collaborating on offering resources and receiving funds to advance the library.   I will act on opportunities within my organization to improve and enhance the library's role in the clinical setting.

LEARNING GOAL 4: Leadership Report Based on MBTI and FIRO-B

How do your behavioral and thinking preferences help you lead?

Looking at your Leadership Report, identify three things you would like to learn more about, create actions around or *actively* reflect on (as in journaling, for instance):

The Services Division within the HS/HSL (24.5 FTE) will be undergoing a reorganization: two services desks will be combined into one and work processes and procedures will be changed. I hope to lead this

change thoughtfully, especially as changes will affect the daily work of all members of the division. Below are three areas for growth, which were identified in my leadership profile. *To be mindful of these areas throughout this change project I will: 1) anticipate and incorporate specific communication, people-focused activities into the project plan and 2) follow up with reflections in a journal or log.*

1. As an ESTJ, I must be careful to pay attention to my non-preferred Feeling and Intuitive parts. Though this change project requires reliance on statistics, analysis and logic, I will be deliberate about considering emotions and impacts on people.

2. My MBTI and FIRO-B scores suggest that I may sometimes feel that I do not get enough support and encouragement during times of change. As I make my way through this project, I will be thoughtful about anticipating and recognizing my need for support and will rely on my colleagues and Library Director.

3. My MBTI and FIRO-B scores suggest that I am willing to work with each person's emotions during a time of change. However, I may feel drained by the process (see #2) and may not do the political maneuvering necessary to influence outcomes. As I lead change and develop a project plan, I will be deliberate about the politics required to influence the desired outcomes.

FELLOW/MENTOR LEARNING PLAN

Name: **Tara Douglas-Williams**   Date: October 31, 2013

Learning Goal 1

I would like to learn more about:

   A. Strategic Planning & Resource Management

   B. Research Support

This learning goal is important to me because:

This learning goal will provide me the opportunity to discuss and gain insight into the process of developing a strategic plan for a larger academic health sciences library and exposure to this multifaceted process. Also, to learn about the budgeting and finance process involved in managing the financial resources in our current environment of budget cuts and reduction in research funding. I would also like to learn about the

University of Pennsylvania's fundraising campaigns for the Library. I had direct involvement with these goals in my previous role in a hospital environment, however, in my current role; I am not involved in these decisions. Also, what are some of the common issues in our institutions?

In order to accomplish this goal I will need:

Fellow: Direct exposure to the budgeting process at the University of Pennsylvania and is possible interaction with the person(s) Barbara works with to manage her budget. In addition, time with her strategic planning team**.**
Understanding how Barbara and her staff build sustainable relationships with the research departments.

Mentor A: *I would introduce Tara to the Collections Coordinator, Melanie Cedrone, for the health sciences libraries at Penn (Biomedical, Dental, and Veterinary). I rely on Melanie to manage our collections budget, and I would ask Tara to join Melanie and me in our discussions of balancing and juggling competing demands on our funds, and Tara would have the opportunity to see how Melanie balances the budget.*
I would also introduce Tara to the Penn Libraries director of finance, so that she can gain insight into the complex overall budgeting issues of the Penn Libraries.

Mentor B: *The Penn Libraries strategic plan holds research support as one of its tenets, and we are undertaking several initiatives to serve the research community. Tara would be able to meet and work with our newest hire, a Research & Knowledge Management Liaison, who begins work at the Biomedical Library in January*

My definition of success is:

Ability to develop & implement a successful strategic plan as well as understand the

operational challenges many library directors must successfully address as it relates to

Budget/Financial management.

Learning Goal 2

I would like to learn more about:

Effective Professional & Personal Leadership

This learning goal is important to me because:

It is essential to understand the key elements of becoming a successful director. Also, it will allow me to reflect upon the results of my leadership assessment and MBTI type. I believe I am a good manager, but how do I now utilize the results of the assessments to become a more effective leader.

In order to accomplish this goal I will need:

Fellow: Really reflect upon my style and be honest with myself as to past failures and what adjustments I can make in my interactions to become a great leader. I will have conversations with my mentor, to receive advice on how she deals with this issue. We have the same MBTI and I think Barbara can really guide me on this journey. She is going to share with me her personal leadership successes.

Mentor: *I would share with Tara not only my personal leadership successes, but also my personal "lessons learned" from leadership mistakes I've made.   I would share my experiences "leading up" as well as my experience leading staff, and share what has worked and what hasn't.*

My definition of success is:

Becoming more transparent with others and being confident in the decisions I make even if they are unfavorable. I need to become more deliberate in establishing balance in my personal and professional life. I struggle with this and often spend 12- 14 hours per day at work and when I get home I am totally exhausted and disengaged from the family.

Learning Goal 3

I would like to learn more about:

Organizational Culture/Dynamics

This learning goal is important to me because:

It is essential to understand the culture and dynamics of an institution to success navigate the academic politics. Also, it will provide me a means of comparison with my current working culture and the culture at University of Pennsylvania.

In order to accomplish this goal I will need:

Fellow: It will be beneficial for Barbara to elaborate on the challenges and opportunities in her institutional culture and how she has successful navigated the culture.

Mentor: *Penn is an excellent place to explore organizational culture. The health sciences libraries function as part of the overall complex Penn Libraries system, which has actually just completed a survey of organizational culture and is exploring ways to interpret the data and implement change based on the results of the study. Tara would be able to observe this process. The University itself is a minefield for studying organizational culture.*

My definition of success is:

I am currently not sure, but as I progress through the fellowship, I will find an answer.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

How do your behavioral and thinking preferences help you lead?

My MBTI results confirm that I am a strategic thinker and long term planner. INTJ's global perspective aids in making critical assessments and logical decisions. The characteristics of my type are essential in effectively leading an organization. I am also aware of some of my traits that can be challenging for others to work with, and I need to seriously reflect upon in the next few months.

Looking at your Leadership Report, identify three things you would like to learn more about, create actions around, or *actively* reflect on (as in journaling, for instance):

1. *Interpersonal Relations.* I would like to explore how I can actively engage others and value their creative ideas.

2. *Power and Organizational Culture.* Learn and assess ways I can gain more power & influence in the Organizational Culture.

3. Dealing with Change and Stress. How do I deal more effectively with stressful work situations?

I really struggle in work environments I consider disorganized and working with people who do not have a similar work ethic. How do you effective align the libraries goals and vision with an organizational change in leadership that is 360∘ different from the previous leader? How do you keep employees focused, motivated and engaged during change?

NLM/AAHSL Leadership Fellows Program
Leadership Institute

Agenda
Hyatt Regency Hotel
Buckingham Room
Chicago, IL

Saturday, May 17, 2014
12:30 – 5:00 pm

Pre-work:

- Mentor sends position description to assigned fellow by **Monday April 14**.
- Fellow sends current CV to interviewer by **Monday, May 5**.
- Fellow writes a customized cover letter and either sends in advance to assigned mentor *or* brings to Institute.
- Fellow researches position and institution in preparation for interview.
- Fellows bring enough copies of position description for each member of the group (18)
- Mentors prepare interview questions (5-8) and bring enough copies for each member of the group (18). Label each sheet with Name of Institution and Title of Interviewer.

12:30 pm   Lunch and Reconnect

1:15 pm   Director Interview Exercise
- Each Pair: 30-minute interview
         15-minute feedback session
- Group Debrief

2:30 pm   Guest Panel:
Jennifer McKinnell, Director, Health Sciences Library, McMaster University (Canada)

Keith Cogdill, PhD, Director, Research Library, NIH
TOPICS:
- Interview/Hiring Experience
- Perspective as New Director

3:30 pm   Break

3:45 pm   Guided Discussion—strategies from mentor directors
- Organizational Culture
- Aspects of Life of Director
- Benefits and Costs of Leadership
- The politics of interviewing

4:45 pm   Wrap-up and Evaluation

5:00 pm   Adjournment

Appendix G
NLM/AAHSL Leadership Fellows Program

CAPSTONE AGENDA
September 29 – October 1, 2014
Washington, DC

Goal of Capstone: *Introduce participants to roles of organizations important to academic health centers, meet key players, and address external issues shaping libraries and their implications for directors.*

Monday, September 29   ***ARL, 21 Dupont Circle, NW, Suite 800***

Goal of Day 1: *Discuss issues of current priority to various organizations and how academic health sciences libraries can benefit and collaborate, including:*
How member associations are addressing scholarly communication and connections between library and information technology communities; AAMC programs and points of interaction and influence for libraries; Role of national libraries now and in the future and collaborative efforts; External funding resources for libraries.

8:30 – 10:00 am	Breakfast Welcome and Capstone overview Setup for sessions	DeEtta Jones Facilitators
10:00 –11:00 am	Scholarly Communications	Julia Blixrud Assistant Executive Director, Scholarly Communications Association of Research Libraries Heather Joseph Director, SPARC Philip Murphy Legislative Assistant Rep. Mike Doyle (PA-14) Facilitators: Chris Frank; Anne Linton
11:00 – 11:30 am	Scholarly Communications and AAHSL	Group Facilitator: Anne Linton
11:30 am – 12:30 pm	Lunch and discussion	Elliott Shore, PhD Executive Director, Association of Research Libraries Facilitator: Pamela Bradigan

12:30 – 1:00 pm	Group debrief/highlights of morning Setup for afternoon	Facilitators
1:00 – 2:30 pm	Association of American Medical Colleges	Ethan Kendrick Senior Specialist on Policy and Constituent Issues Eric Weissman, Senior Director, Council of Faculty and Academic Societies David B. Moore Senior Director for Government Relations Facilitator: Carol Jenkins
2:30 – 2:45 pm	Break	
2:45 – 3:45 pm	Panel: Changing Role of National Libraries	Roberta Shaffer Associate Librarian for Library Services, Library of Congress (ret.) Joyce Backus Associate Director Library Operations National Library of Medicine Christopher Cole Manager, Business Development National Agricultural Library Facilitator: Jerry Perry
3:45 – 4:45 pm	Institute of Museum and Library Services	Robert Horton Associate Deputy Director for Library Services Facilitator: Barbara Cavanaugh
4:45 – 5:00 pm	Wrap-up and directions for tomorrow	
6:00 pm	Group dinner	***Hotel Tabard Inn*** ***1739 N St NW, Room 26***

Tuesday, September 30

Bethesda, MD (Medical Center stop, Red Line, Metro), NLM Board of Regents Room

Goal of Day 2: *Discuss NLM's roles and initiatives with leaders of key offices; Informationist program at NIH library; NIH data management planning*

Breakfast on own

8:30 – 9:00 am	Arrival at NLM Group debrief/highlights of Monday sessions; setup for day	Facilitators
9:00 – 10:30 am	Library Operations: Outcomes Assessment and Measurement	Joyce Backus Associate Director Library Operations
		Dianne Babski Deputy Associate Director Library Operations
		Martha Fishel Chief, Public Services Division
		Jennifer Marill Chief, Technical Services Division
		Jeffrey Reznick, PhD Chief, History of Medicine Division
		David Gillikin, Chief, Bibliographic Services Division
		Facilitator: Jerry Perry
10:30 – 10:45 am	Break/Informal meeting with panelists	
10:45 am – 12:00 noon	Tour of NLM	Shana Potash Public Affairs Specialist Ofc of Communication and Public Liaison

12:00 noon – 1:00 pm	Lunch and discussion **Board of Regents Room**	Betsy Humphreys Deputy Director Donald A.B. Lindberg, MD Director Facilitator: Julie Sollenberger
1:00 – 1:45 pm	NCBI Research Initiatives	Kathi Canese PubMed Product Manager National Center for Biotechnology Information Facilitator: Tania Bardyn
1:45 – 2:30 pm	Linking Information Resources to the EHR	James Cimino, MD Chief, Laboratory for Informatics Development, NIH Clinical Center Senior Scientist, Lister Hill National Center for Biomedical Communications Facilitator: Judy Cohn
2:30 – 3:15 pm	Break and shuttle to NIH Library **10 Center Drive, Bldg. 10, Room 1L-25**	(will try to arrive by 3:00)
3:15 – 4:00 pm	NIH Plan for Managing Big Data	Philip Bourne, PhD Assoc. Director for Data Science, NIH Facilitator: Barbara Cavanaugh
4:00 – 5:00 pm	Welcome and overview Informationist services for HHS	Keith Cogdill, PhD Director, NIH Library Nancy Terry Informationist

Data services for NIH	Lisa Federer Research Data Informationist
Bioinformatics support program	Medha Bhagwat Bioinformatics Support ProgramCoordinator/Informationist
Technology Sandbox and Renovations	MaShana Davis Information Architect
Tour	Ben Hope Chief, Information Architecture Branch
	Facilitator: Julie Sollenberger

Evening on own

<u>Wednesday, October 1</u>   *ARL, 21 Dupont Circle, NW, Suite 800*

Goal of Day 3: Discuss issues and programs and implications for academic health sciences libraries, including:
Developments in how advocacy organizations are addressing scholarly communication and the perspective of the legislative process;
How groups influence legislative issues from complementary perspectives and role of library director; Redefinition of libraries in research institutions;
Importance of collaborative and patient-centered care to professional associations; Impact of AAHSL.   Review year and transitions.

8:30 – 9:30 am	Breakfast Group debrief/highlights of Tues. sessions Setup for morning sessions	Facilitators
9:30 – 11:00 am	Panel: Information Policy and Funding	Prudence Adler Associate Executive Director, Federal Relations and Infor. Policy, Assoc. of Research Libraries Jerry Sheehan Assistant Director for Policy Development National Library of Medicine Alan Inouye, PhD

		Director, Office of Information Technology Policy, American Library Assoc.
		Facilitator: Chris Frank
11:00 – 12:00 pm	Transforming Research Libraries	Judy Ruttenberg, Program Director, Assoc. of Research Libraries
		Facilitator: Pamela Bradigan
12:00 am – 1:00 pm	Lunch and discussion; Debrief, setup for afternoon session	Facilitators
1:00 – 2:30 pm	Interprofessional Education and Team-Based Care: Association Perspective	Carol Aschenbrener, MD Chief Medical Education Officer, Assoc. of American Medical Colleges (ret.)
		Mary Bondmass, PhD, RN Director of Faculty Initiatives Assoc. of American Colleges of Nursing
		Jen Adams, PharmD. Senior. Director of Strategic Academic Partnerships, Assoc. of American Colleges of Pharmacy
		Jeff Williamson, Vice Pres. for Education and Academic Partnerships, American Medical Informatics Assoc.
		Facilitator: Jim Bothmer, AAHSL President
2:30 – 3:15 pm	AAHSL Issues and Roles	Jim Bothmer President,

3:15 – 5:00 pm	Group debrief/highlights of day and connections to AAHSL	Facilitators
	Open Forum: Post-Program Transition	DeEtta Jones Fellows
	Evaluation of year Wrap-up	DeEtta Jones
6:30 – 8:00 pm	Reception and graduation ceremony ***Mayflower Renaissance Hotel, Colonial Room*** ***1127 Connecticut Avenue NW***	

Rev. 091314cj

NLM/AAHSL Leadership Fellows Program
2013-2014

Reception and Graduation Ceremony

Renaissance Mayflower Hotel
1127 Connecticut Ave. NW
Colonial Room

Wednesday, October 1, 2014
6:30 – 8:00 pm

PROGRAM

7:00   **Welcome and Program Background**   **Judith Cohn**
Chair
AAHSL Future Leadership Committee

7:05   **Perspective on Program**   **DeEtta Jones**
President
DeEtta Jones and Associates, LLC

7:10   **What It's Meant to Be a Fellow**   **Alexa Mayo**
Associate Director for Services, Health Sciences
and Human Services Library
University of Maryland

7:15   **What It's Meant to Be a Mentor**   **Chris Frank**
Director of Library
Rush University Medical Center

7:20   **Recognition of Fellows and Mentors**   **A. James Bothmer**
Presentation of Certificates   President, Association of Academic
Health Sciences Libraries

Betsy Humphreys
Deputy Director
National Library of Medicine

Reception

NLM/AAHSL Leadership Fellows Program
2013-2014

EVALUATION OF YEAR

1. Please indicate whether you are a fellow or a mentor.
   Fellow __6__   Mentor __6__   (total of 12 responses)

Please select a numerical rating for each component indicating the extent to which it met one or more of the Program objectives, ***with 6 being the greatest extent***. You are **highly** encouraged to add comments at any point to explain answers or to offer suggestions for improvement.

*Mentors: if questions refer to **"or your fellow,"** please answer from the perspective of your observation of your fellow, **not from your own perspective***.

In-Person

Orientation at AAMC Meeting

2. **Did you find the Orientation helpful for creating a sense of community? (5.63 of 6**)

   Comments:

   ■ This session established the responsibilities and provided a clear timeline for the year.
   ■ A good start... The additional Fellows dinner and the opportunity to meet with my mentor for breakfast also helped. The combination of all these things was extremely helpful to me in creating 'community.'
   ■ I would like to suggest some type of Introduction call, prior to the in-person Orientation—nothing elaborate, but something to bridge the gap and provide continuity between the time we are notified of acceptance into the program, and the Orientation. I felt a bit overwhelmed and unprepared during the Orientation. I was trying to "learn" the people I was going to spend the next year with, trying to grasp the program, and trying to get the most I could from the Orientation. As I look at the 2 Facilitated Discussion questions, they seem to assume that we all knew/had worked with one another. Perhaps in the Introduction call, we could have all introduced ourselves (Fellows and Mentors) and been given a brief overview of the Orientation Agenda. In addition, we could have been given these 2 questions to think about/prepare for the discussion.
   ■ It was important to get together face to face up front since much of the program took place virtually.
   ■ The Orientation was a good launch to creating community among the fellows, but by the end I did not have a sense that the cohort as a team had "bonded" - that could be as much about the personalities as the programing, so that is just an observation.

3. **During the Orientation, we spent time explaining the components of the Program, focused on your personal vision, looked at emerging trends in the health sciences library field, allowed time for fellow-mentor pairs to meet, and debriefed the two leadership instruments. How appropriate or helpful was this content? (5.5 of 6)**

   Comments:

   - The webinars were very informative and on relevant topics that are essential to becoming a better leader.
   - Good balance of types of content and activities
   - I did not know my mentee previously and found all of this to be very helpful.
   - In my opinion there was too much information to cover in the time allocated. I thought we rushed through some agenda items and suggest a more realistic agenda with fewer items.

4. **Were the leadership instruments you completed prior to Orientation and your debriefing valuable to you (or your fellow) for building self awareness, and in planning your fellowship experience? (4.88 of 6)**

   Comments:

   - It was enlightening for me and explained why I behaved a particular way. It also informed me of areas I still need to develop and improve.
   - This was an important component in clarifying my leadership style and approach.
   - Most people are not familiar with the FIRO-B. It is an invaluable complement to the Myers Briggs and I really appreciate having the opportunity to complete both tests. I'm not sure it helped me during my Fellowship experience, but it helped me consider how to relate to staff who are different than I, and I can definitely use this information in the future.
   - Too little time to discuss and limited the value.

5. **Did your attendance (or that of your Fellow) at the AAMC Annual Meeting foster understanding of the academic medical environment? (5.0 of 6)**

   Comments:

   - Did not attend. Not sure that my mentee learned anything of significance.
   - I benefited from the AAHSL program as well as exposure to AAMC programming. It identified me as a integral part of the GME team for my institution. My President/Dean was very impressed that I was in the leadership program and had an opportunity to attend AAMC.
   - I think AAMC attendance is important for gaining perspective of some of the big-picture issues. It is a bit overwhelming if you haven't attended before to understand the levels of information available to glean from the conference, content, and connections with individuals.

- This was my first AAMC meeting. I now understand the value and importance for Directors to attend this meeting (maybe not every year but regularly), and to provide an opportunity for Library Management staff to attend.

Leadership Institute at MLA Annual Meeting

6. **One goal of the Leadership Institute was to reconnect the group as a learning community by sharing time together. How helpful was this to you? (5.75 of 6)**

   Comments:

   - The in-person meetings were invaluable. We had opportunities to interact with other Director's and gain knowledge.
   - Having time midway through Fellowship to connect face to face was important to me
   - I think the Leadership Institute could have been a full day. See comments to following comments.
   - Since it occurred at a midpoint of the program (or nearly), it was good to touch base both with my mentee and with fellow mentors and see how things were going. I also appreciated the chance to work with a new mentee for the interview session and get to know someone else pretty well.

7. **During the Leadership Institute we conducted mock director interviews, had a panel of new directors discuss their interview, hiring, and initial on the job experiences, discussed organizational culture, the costs and benefits of leadership, and the process of interviewing for and negotiating a directorship. How helpful or appropriate was this content? (5.25 of 6)**

   Comments:

   - I think it was very useful to the fellows
   - The feedback I received from the Mock Interview is invaluable. Everyone was very transparent and I really appreciate everyone sharing experiences and providing great feedback.
   - Very helpful!!
   - I didn't feel the 2 Library Directors selected for this year were very helpful. The NIH Library Director's input wasn't very helpful, simply because it is a Federal Government position. Most Director positions have room for more negotiation. The McMaster Library Director's input wasn't very helpful because she was an internal candidate and I didn't get the impression that she was able to negotiate much. Tania Bardyn contributed so much to this conversation based upon her experience. I didn't feel that the new directors spent time describing their interview schedule, which would have been very helpful: one day – 1.5 days, phone interview, types of people (positions) they interviewed with, etc.
   - I personally learned a lot throughout this program-- webinars, leadership institute, etc.

- I think the Fellows found the job interview experience to be particularly valuable, and I was glad to be paired with a Fellow who was not "mine" - I learned a great deal about her and her strengths.

8. **If we expand the Leadership Institute to a full day instead of a half day, what do you suggest we spend more time on?**

   Comments:

   - not sure
   - An opportunity to meet one-on-one with each mentor and fellow. We talked in social settings but I would have liked dedicated time maybe 15-20 minutes each mentor rotating to each fellow; then part two each fellow spending one on one time together. Maybe a structured questionnaire for mentors.
   - Totally agree with expanding the Leadership Institute to a full day. Suggested content: sharing one key take-away from 1st site visits, add another management discussion topic, time to review/update/report out on learning goals
   - I would suggest that the Leadership Institute be expanded to a full day. Suggestions for filling in the agenda (or for future Journal Clubs): It would have been extremely helpful if we had been introduced to negotiating the complete compensation package. This is an executive skill and not something we, as librarians, are adept at or aggressive in pursuing. The Leadership Institute is a good forum in which to do this. In addition, it would be helpful for someone to collect the various items negotiated (or items they may have learned others in their institutions have negotiated), over the past 5 or so years by Fellows who have become Directors (and/or Mentors who wish to participate) and make this information available to the cohort. Not every option will be available in every setting, but it at least provides a baseline in which we can direct our thinking when considering positions. I appreciated having a Director who was not my mentor, interview me. The Director I was assigned for the mock interview did not provide me with feedback on my CV. A suggestion would be to continue to have Fellows and Mentors interview with Fellows and Mentors not their own, and then to interview with your Mentor. I felt that if I had had an opportunity to interview with my mentor, we could have spent some time during my 2nd site visit reviewing some of the areas in which I had problems, further discussing the interview process, etc. This exercise was very important and valuable; however, I felt that since I had not gone through this with my Mentor, it was disjointed. A CV/resume clinic would have been very helpful. I still am not sure how to structure my CV/resume for a Director position.
   - Organizational culture and preparing for interviews
   - How to think strategically, and why it's important to think thru your options ahead of time. This could be done thru case studies; give a scenario and ask the Fellows to construct strategies for addressing, which they would then present to the group for feedback.
   - Changeable from year to year.

■ Expand time on mock interview and slow down the pace a little.

Capstone

9. **To what extent did the Capstone present the role of organizations important to academic health centers and introduce key players? (6.0 of 6)**

   Comments:

   ■ I was overwhelmed but thankful for the experience.
   ■ I gained valuable new insights that otherwise would have been second hand information (at best)

10. **To what extent did the Capstone address external issues shaping academic health center libraries and their implications for library directors? (5.86 of 6)**

    Comments: none

Please indicate how appropriate you found the content and presentation of the individual Capstone sessions:

11. **How helpful was the content and presentation on scholarly communications?** (Blixrud, Joseph, Murphy) **(6 of 6)**

    Comments:

    ■ Great information I am using now.

12. **How helpful was the discussion about AAHSL's role in scholarly communications? (5.83 of 6)**

    Comments: none

13. **How helpful was the content and discussion about ARL's role and future directions?** (Shore) **(5.67 of 6)**
    Comments:

    ■ Very exciting to learn about ARL's future directions; an inspiring presentation by Elliott Shore. As to the helpfulness of the content...good insights for those working closely with university library though not as directly relevant to those less (or not) connected with university research library. Good to have the context, so would keep as a component of the Capstone.

- Elliot Shore was terrific!

14. **How helpful was the content and presentation about AAMC's goals and programs** (Moore, Weissman, Kendrick)**? (5.5 of 6)**

   Comments:

   - It was good to hear their perspective on the role of libraries in medical education.
   - Valuable to have the "set-up" discussion prior to the presentations by this group from AAMC. Presentations themselves helped in gaining insights into AAMC organization and roles. Would have actually been helpful to have this information prior to attending AAMC the previous Nov.
   - I knew a lot of this already.

15. **How helpful was the content and presentation about the roles of national libraries (Shaffer, Backus, Cole)? (5.33 of 6)**

   Comments:

   - Interesting session; never thought about the other libraries
   - Fascinating to learn about the issues facing the three national libraries and the uniqueness of each.
   - Again I knew a lot of this.

16. **How helpful was the content and presentation about IMLS (Horton)? (4.83 of 6)**

   Comments:

   - It was good to hear there is another funding stream.
   - Helpful to learn about external funding opportunities. Might be better to have a panel covering external funding sources available (include IMLS, explanation of different NIH grants, etc)
   - Interesting but not of particular interest to my institution.

17. **How appropriate was the content and presentation about NLM Library Operations (Backus and panel)? (5.43 of 6)**

   Comments:

   - Gained helpful insights into the breadth of operations and roles within NLM

18. **How helpful and informative was the NLM tour? (Potash) (5.0 of 6)**

Comments:

- Great tour
- Good experience for people new to NLM

19. How helpful and informative was the discussion with NLM Leadership (Lindberg, Humphreys)? (5.14 of 6)

Comments:

- It was good to spend time with them both. They have accomplished and had an awesome impact on our professional over the years.
- Learning about the vision and priorities of NLM very important

20. How appropriate was the content and presentation on NCBI (Canese)? (4.71 of 6)

Comments:

- Could have used more detail, especially how the various departments/projects work together.
- Would have appreciated a bit higher level of sharing and visioning on NCBI Research Initiatives, too much on detailed changes

21. How appropriate was the content and presentation on NLM's EHR and BTRIS research (Cimino)? (5.0 of 6)

Comments:

- appropriate content when building upon NLM/MBI Biomedical Informatics Course, as well as the pre-Capstone readings; Need more context in general about EHRs and data management as it relates to academic health sciences libraries moving forward
- The focus in InfoButtons is somewhat dated.

22. How appropriate was the content and presentation on NIH Big Data Management (Bourne)? (5.57 of 6)

Comments:

- I know that the time was short, but I would have appreciated more detail.
- Exchange was beneficial.
- Key issue on our horizon, and excited to see NIH addressing (big) data management and including libraries in the discussion and planning

23. How helpful and appropriate were the presentations on the NIH Library's programs: informationists, tour and technology sandbox (Cogdill and staff)? (5.57 of 6)

Comments:

- They have a great program. It was encouraging to see how Keith and his staff are embedded within the NIH and the services they provide.
- Interesting, though not appropriate balance of presentation time between the Library programs. Would have appreciated more time on the Library's strategic planning and assessment (particularly of the informationists program) than on what individuals were doing.
- Again I knew a lot of this.

24. How appropriate was the content and presentation on information policy and funding affecting libraries (Adler, Sheehan, Inouye)? (5.71 of 6)

Comments:

- gained new insights into policy related work

25. How helpful was the content and discussion about ARL's efforts to support transforming research libraries (Ruttenberg)? (5.71 of 6)

Comments: none

26. How helpful was the content, presentation and discussion about interprofessional education (Bothmer, Aschenbrener, Bondmass, Adams, Williamson)?

Comments:

- Good to hear a different perspective.
- Absolutely fascinating and exciting to learn about involvement with IPE, looking forward to seeing these initiatives impacting the local schools
- Very interesting!

27. How helpful was the open discussion reflecting on the overall program and personal transitions (Jones)?

Comments:

- It was good to hear how each of us viewed the experience and what we each thought had a positive impact on us.
- Helped put full program content into perspective for myself with practical ways of thinking about my next steps

- At this point in the day it seemed to me the Fellows were too tired to actively engage. I thought that they were too quiet throughout the day but especially at this point. I hesitate to suggest extending the Capstone, but maybe the pacing needs to be reconsidered

28. How successful or enjoyable were the social events (group dinner, closing reception)? (5.71 of 6)

Comments:

- Always good to have more relaxed settings for engaging people one-on-one (and a bonus to have these social events in lovely places)
- It was a lovely event, highlighted by Chris and Alexa's presentations.

29. How well did the Capstone allow for discussion and processing of new information? (5.0 of 6)

Comments:

- Would have liked a few more days worked in. Maybe one more meeting during MLA and 1 additional day for Capstone.
- There was a lot to take in. The "debriefs" and "set-ups" where helpful in making the transition between topics/presenters. More time to process would be good, but I'm not sure an extra day is actually needed.
- Overall, the Capstone was excellent! I had no idea what to expect. It was a tremendous amount of valuable information.
- See comment above about pacing!

30. How well did the Capstone balance contributions by both Fellows and Mentors? (5.14 of 6)

Comments:

- perhaps the fellows should have partnered with their mentors on facilitating/researching the sessions?
- There was a great balance and we were all matched perfectly with a mentor. I will treasure this experience always. Thank you for the opportunity.
- As a Fellow I felt I was absorbing more than actually contributing. Maybe more time would allow for more contributions. Did not think that the Mentors' contributions were out of line...their sharing as directors was very valuable.
- I take responsibility for talking too much, but this was an opportunity for me as a Mentor to learn as well and I was not going to pass it up. How might the Fellows be encouraged to interact more robustly with the leaders we met? Perhaps, based on the agenda, Fellows could be asked to construct questions which are then added to a

pool and distributed, with the Fellows then "required" to ask a question at the appropriate time during the agenda.

Virtual Learning Community

31. How appropriate were the webinar topics for filling in gaps in the overall learning experience? (5.29 of 6)

Comments:

- I felt it was a mixed bag.
- Each mentor did a great job in presenting information on their assigned topic.
- Overall found the webinars very valuable and thought that there could be some additional sessions –
- I recommend the topics and assignments be reconsidered. Most of the basic content is avaiblable in a book or article. For example can content be identified and assigned to Mentors to further develop including creating powerpoint, leading discussion and activity. Asking mentors to do al the background work seem to be too much especiually when there maybe another way to get same results.

32. How appropriate were the content, assignments/readings, and presentation for the webinar on "Power and Influence"? (Basler) (5.14 of 6)

Comments:

- Obviously, too much reading, but an important topic
- Learned a lot reading the required readings
- Great first webinar to jump right into! Appreciated the insights and the discussions. Though we really didn't have enough time to completely cover all the outlined content. The number of readings seemed overwhelming - though provided a solid background for the presentation and discussion.

33. How appropriate were the content, assignments/readings and presentation in the webinar on "Workforce Issues"? (Bradigan) (5.14 of 6)

Comments:

- Workforce are issues I am dealing with now. The webinar prepared me for this time.
- Essential content and comforting to realize that I already knew and had experienced much (but not all) of what had been covered. appropriate readings.

34. How appropriate were the content, assignments/readings and presentation for the webinar on "Enhanced Library Roles"? (Cavanaugh) (5.71 of 6)

Comments:

- Loved Barbara's approach to the material.
- I like the way she presented the information from the perspective of her institution. My library is at a point where it is critical that we assess the staffing needs and redefine roles/positions
- Enlightening to get the individual's perspectives about their work and fit within the library. Very timely topic; appropriate readings

35. How appropriate were the content, assignments/readings and presentation for the webinar on "Managerial Finance"? (Frank) (5.67 of 6)

Comments:

- Oh boy! This is a big one. It is exhausting sometimes fighting for the needs of your library. Chris was very honest that sometimes you win the battle and sometimes you do not.
- Very helpful to understand the variety of budgeting models and have conversations with own director (as well as with my mentor) on budgeting within my own institution.

36. How appropriate were the content, assignments/readings and presentation for the webinar on "Strategic Planning" ? (Deiss, Perry, DeSantis) (5.71 of 6)

Comments:

- I really like the way Colorado wrote their Strategic Plan, We are in this phase at our institution, so the knowledge gained is a definite asset for me.
- Valuable to learn about the diversity in strategic planning processes between institutions, and even personal preferences for strategic planning. The follow-up bibliography that Kathryn provided is a useful reference.

37. How appropriate were the content, assignments/readings and presentation for the webinar on "Diversity and Inclusion"? (Jones, Perry) (5.17 of 6)

Comments:

- I wish we had some in-person time to indulge in these topics more deeply.
- A challenging discussion that needs to be ongoing (for each of us and our institutions). It was good to see the variety in responses to our own background...a good exercise to reinforce the extent of diversity around us.

38. How appropriate were the content, assignments/readings and presentation for the webinar on "Crisis Management"? (Linton) (5.0 of 6)

Comments:

- Anne did an excellent job in presenting this topic
- Valuable insights into being prepared for a crisis so ready to respond, and respond appropriately, including working with others outside of the library.
- All of the webinars had good information but the discussions were the best part. It is really helpful to hear how directors have coped/worked with the various topics.

39. Did you fully prepare for and participate in the assignments and readings preceding the monthly webinars? (5.43 of 6)

Comments:

- I fell behind on 2 readings but eventually caught up. The readings were helpful in enhancing our knowledge base before the webinars. We were prepared for the sessions. I think at times we did not have many questions because the reading complemented the webinars and this may have contributed to us not asking a lot of questions. The combination achieved the goal.
- I missed a few readings but otherwise was prepared.

40. Was online communication using the aahsl-leaders2014 listserv and/or aahsl-fellows2014 listserv valuable to you? (100% said Yes)

Comments:

- It was very beneficial. I have a deep appreciation for the AAHSL Directors. The information has really helped me understand the landscape and how to better navigate it.
- Valuable for staying informed
- I wish the Fellows had used the listserv more.

41. Was online communication using Basecamp (document sharing and email) valuable to you? (100% said Yes)

Comments:

- It was great to receive the posting alerts. I liked the fact I could go and read posting as well as download documents.
- good to have a centralized place for shared resources and information and not to be dependent on email only.
- I appreciated having access to the shared space to retrieve documents, etc.
-

Overall Feedback: Please indicate how well you think the program met its overall objectives

42. Introduce Fellows to leadership theory and practical tools for implementing change at organizational and professional levels (5.71 of 6)

Comments:

- Knowledge gained - priceless
- Good balance between the topics of the webinars and the discussions with mentors (during the webinars or one-on-one during the site visits). The site visits were extremely important for seeing the theory in practice.
- I think it was great that my fellow had an opportunity to visit other medical libraries while here and that we were then able to talk about different models and approaches

43. Introduce Fellows to critical issues facing academic health sciences libraries (5.71 of 6)

Comments:

- I was not aware of a few topics and it was great to have the exposure.
- Saw this happening during each activity, from the first to the last, in-person or online.

44. Develop meaningful professional relationships between Fellows and Mentors that give Fellows access to career guidance and support (5.86 of 6)

Comments:

- Without the opportunity to develop a meaningful relationship with my mentor (and connections with other mentors and Committee members), this would have been just another academic course without nearly the impact on my career path.
- This remains the greatest strength of this program and its construction - the pairing and the relationship that evolves.

45. Expose Fellows to another academic health sciences library and its institutional leadership under the guidance of their Mentors (5.86 of 6)

Comments:

- The on-site experience was very rewarding. My mentor did an excellent job of scheduling meetings with key power brokers. We had great conversations and I learned so much from her. It is a very valuable relationship.
- The realm of academic health sciences libraries is very diverse and having first hand experience in my Mentor's library was extremely valuable, as well as insights in to the operations of other Mentor's libraries.
- I was pleased with how many leaders of our schools wanted to meet with my fellow and how much time they spent with her!

46. <u>Examine career development and provide director models (5.86 of 6)</u>

<u>Comments:</u>

- Valuable information gleaned indirectly over the course of the fellowship
- See comment 42. (Introduce fellows to critical issues)

47. <u>Create a cohort of learners who will draw upon each other for support throughout their careers (5.29 of 6)</u>

<u>Comments:</u>

- Not sure if fellows bonded closely.
- Previous fellows have been very supportive and always willing to share experiences.
- I'm looking forward to continuing connections with this cohort, and continuing building the support network among this group.
- Fellows really bonded!
- If there's a theme to my feedback it is that I worry that the Fellows did not connect at a deep enough level such that they will rely on/refer to each other into the future. It may be there but i didn't see evidence of a bond forming. I appreciate how busy the Fellows are, and how much work they have to do in their "home" lives, but could thought be given to having a capstone project, something the Fellows could work on over the year and present at the capstone? That might be more important that the webinars; which could perhaps be transformed into a course-pack of readings.

48. <u>Promote diversity in the leadership of the profession (4.86 of 6)</u>

C<u>omments:</u>

- <u>Evident throughout the program</u>

49. <u>Offer recognition to emerging leaders and enhance their competitive standing (5.71 of 6)</u>

<u>Comments:</u>

■ <u>I definitely feel I have been given an edge from the learning experiences offered by this Leadership Fellowship.</u>

50. <u>Did you feel the blended curriculum (in-person group time, web-based learning, site visits, and one-on-one mentoring) worked well to meet Program objectives? (100% said Yes)</u>

<u>Comments:</u>

■ <u>It was a nice balance of in-person and virtual. If I had had to do more travel or in-person, I may not have been able to make the commitment to be a mentor.</u>

51. <u>Did you have the opportunity to get to know Mentors (or Fellows) other than your own? (100% said Yes)</u>

<u>Comments:</u>

■ Did not have as many one-on-one interactions as I would have liked.
■ The informal and social interactions were very helpful in getting to know the other Mentor, and the occasional exercises that matched us up with others within the cohort.

52. <u>Did the Program's design and workload allow you to satisfy your expected level of participation while fulfilling other professional or personal demands? (100% said Yes)</u>

<u>Comments:</u>

■ I would have liked to have more advanced notice about our facilitation responsibilities. I did not know that we'd be asked to facilitate at the Capstone. September was a very busy month for me, and fitting in the preparation for facilitating was a bit stressful. I'd suggest assigning mentors to the topic a couple months earlier, and maybe having them share responsibility with fellows.
■ I was able to participate in the fellowship as well as perform the duties of my position.

- Initially I was expecting a heavier demand by the Program. In the end, I was grateful for the level and balance of the workflow, particularly when added together with other professional and personal demands.

53. How well did the faculty and AAHSL personnel support you as you progressed through the Program? (5.71 of 6)

Comments:

- Carol has been extremely kind and supportive.
- Helpful, available, and ready to assist
- Carol was terrifically supportive and organized!

54. Did your participation in the Program have an effect on the staff of your home library? (Yes, 71.42%; No, 14.29%; Unsure, 14.29%)

Comments:

- Staff enjoyed meeting with my fellow. The fellow was very helpful in giving feedback to staff on issues/problems they were facing.
- Change to put some learning into practice within my own unit; different level of conversations and discussions with my director.
- But everyone was very happy to meet my fellow and spend time with her.
- They appreciated meeting and talking with my Fellow, and my Fellow was very strategic about establishing rapport with, and then following up with, many of the contacts i orchestrated.

55. Please describe how you think your career (or your Fellow's career) will be impacted, in the near-term and long-term, by participating in the Program

Comments:

- I think that the program is an excellent selling point in Fellows' resumes for higher level administrative positions. In the short term, I'm not sure what the impact will be.
- I have already been seriously considering a directorship. I have not had an interview yet but am being strongly considered.
- The options for my career going forward are broader. Plus I am considering director positions much sooner than I would have otherwise done. Also have a much richer support network to assist me through career changes/advancements
- I gained confidence, knowledge, and experience that I can use to consider Director positions.
- Me-- forced me to stop and think about important issues instead of just being immersed in the day-to-day. Very valuable. Fellow-- she is definitely interested in moving up!

- Due to my Fellow's interests, i was able to locally connect with colleagues at my institution with which I typically do not engage with that much frequency, so it was most helpful to have that opportunity.
- Program provides insights, personal observations and interacts that are not available in other leadership experiences

56. To what extent were the goals and expectations in your learning plan (or those of your Fellow) fully met? If not, what could the Program have done differently to promote success? (5.43 of 6)

Comments:

- It was a very quiet group of fellows. I'm not sure what could have been done to promote Fellows' volunteering their opinions about issues. But I know it would have been better for them if they could have shared more in group settings, especially the webinars.
- All of the goals were met. I am still working on my personal goals.
- Made progress on all my learning goals, though didn't meet all the objectives. An intentional mid-point check (like at the May Institute) would have been valuable.
- We worked hard to stay on track with the plan-- especially in our monthly calls!
- The plan was helpful but circumstances for my Fellow changed over the course of the year that ended up reframing our areas of focus. I think the program was still as beneficial; I think the plan just became less relevant

57. What other suggestions do you have for improving the Program?

Comments:

- Consider expanding the length of the webinars, even by 15 minutes, to give time for completing discussions or for some quick 'touch base' conversation. Also consider adding a webinar in early December--it just seems like the momentum is jump started in early Nov. and then there is nothing until mid-January. Even if the December webinar is on a lighter topic or geared on getting to know each other better (maybe the sharing of who we are and where we are coming from) would be valuable. I strongly support expanding the May Institute to a full day session! (reasons already given) ****** Feedback on DeEtta's and Kathryn's role: very valuable to have this 'outside' [but not really] facilitation and perspective as part of this overall program!! ****** A more formal introduction of the Future Leadership Committee and their role throughout the Program would have been helpful, then followed by the luncheon with the Committee. ************** Carol's role throughout this Fellowship was instrumental in the success of the Program. I can only imagine the amount of time she spent coordinating the many aspects of this program. Her role needs to be recognized for the value it brings to the Program. Hats off to you Carol!

- Journal Club - I understand that the Mentors are human :), but it would be good to have the required reading lists at least 2 weeks in advance of the Journal Club. The Fellows are busy, too. The 1st Journal Club was really off-putting, receiving 30+ articles on the Friday before the Journal Club. I'm not sure what goes on behind the scenes between the Program Coordinator and the Mentors, but guidelines for preparing for their Journal Club would be helpful. Also, consider doing "something" (nothing elaborate) to help provide continuity between the Orientation at AAMC/AAHSL and the January (first) Journal Club. I really sort of felt that the time between the Orientation and the January 2014 Journal Club was too long to not have contact with the cohort of Fellows and Mentors. As I mentioned earlier, there were 2 "gaps" that you might consider filling to provide continuity to the program: the time between acceptance into the Program and Orientation, and the time between Orientation and the first Journal Club. Finally, I want to thank AAHSL for a very rewarding opportunity!
- Thanks.
- Great program and keep up good work. My suggested change relates to webinars and mentor role/responsibility given above. Thanks for developing a first class experience for Fellow and mentors too. I enjoyed the opportunity and will recommend it to others. Carol did an excellent job keeping us moving along and the facilitators were first class!

Appendix I.
Future Leadership Committee Progress Report to the AAHSL Board February 2014

Drafted by Carol Jenkins with input from Judy Cohn, Julia Sollenberger,
Tania Bardyn, Pam Bradigan, Nadine Dexter, and Teresa Knott

The purpose of this progress report is to inform the AAHSL Board of ideas for sustaining and improving the NLM/AAHSL Leadership Fellows Program that are being considered by the Future Leadership Committee, based on findings from the 2013 LaPelle Evaluation Study; and to seek Board input.

The evaluation study was conducted at AAHSL's request by Nancy LaPelle from March – October, 2013. Conducted in two phases, the study surveyed 33 fellows participating in the program from 2005-2012; and interviewed 13 of those fellows who were library directors when the study began. This study updates a similar study conducted in 2007 of the 2002-2005 classes, and supplements evaluations of the current cohort conducted annually by the committee.

An Executive Summary of the study findings was shared previously with the Board. That report should be viewed alongside this progress report, since details of the process and findings presented there are not repeated here.

The Committee is considering three key questions:
  (1) Based on participant feedback and other data, how well does the Fellows Program meet
      AAHSL's overall goals for leadership development, and NLM's goals?
  (2) Based on participant feedback, how well does the Fellows Program help meet their
      leadership development goals?
  (3) How can the Program be improved?

AAHSL/NLM goals:
This program has been successful in developing leaders who assume AAHSL library directorships and other leadership positions. 46% of its graduates have become directors. NLM has indicated its support for the program by continuing to fund it and by participating in its activities. The AAHSL program is unique; but there may be interest in further research to compare its results to those of other library leadership programs in meeting their stated goals, for example the ARL Leadership Fellows Program.

There may be a need to broaden AAHSL's leadership development activities to help directors do succession planning, based on results of the AAHSL Directors Workforce Study, 2012. How well does this program address the projected future need for directors, considering the documented retirement rate (in 2012, 72% or 65 directors planned retirement within the next 10 years) and the projected growth in new medical schools (8 LCME applicant schools without library directors as of January 2014)?

Is there Board interest in further research on these questions? Considering evidence from the AAHSL Directors Workforce Study, 2012, are there other areas the FLC should explore?

Impact on Fellows:
94% of fellows responding to the survey said it solidified or increased their interest in becoming a director. Of graduates who are not directors, slightly more than a third said the timing or opportunity has not been right. Over half have been promoted to higher positions. As stated in the executive summary, we think these results confirm the success of the basic design and goals of the program.

The executive summary describes in more detail what the graduates valued most about the program. Of note are these themes: the value of the relationships built both within their cohort and beyond, in AAHSL; learning more about what the director's job entails; clarification of personal goals; building confidence; and personal growth and professional involvement.

These quotes from respondents are representative:
"While the curriculum expanded my cognitive framework about being a director, I rely much more heavily on the relationships developed through the LFP. These relationships expand beyond those formed in the LFP cohorts and encompass AAHSL directors who are deeply engaged in building the program and shaping the future of academic health sciences librarianship."

"Mentors in my group have been references for me, provided key job advice and have gotten me involved in some consulting projects. I do not think I would have the job now if it had not been for their endorsement of me and I would not have had the opportunity to know them as well as I do without the program."

The FLC will continue to refine specific aspects of its program while being attentive to preserving these positives.

How can the program be improved:
Four themes are presented in the executive summary: curriculum design and content, selection and matching process, mentor preparation and guidance, and network of participants. The committee is considering survey results for each theme. Since an evaluation is conducted each year, some changes were made during the time period covered by the LaPelle study. Ideas currently being considered are:
- increased emphasis on a mid-point discussion (likely at MLA), to be sure the program is meeting the specific goals of that particular cohort
- more consultation with DeEtta Jones and Kathryn Deiss around leadership content
- continue to encourage more AAHSL mentors, while giving new fellows more of a voice in their matches
- involve directors earlier in the application process, perhaps encouraging nominations in addition to a letter of support; this also relates to succession planning
- increase support for mentors through consultation and training throughout the year
- continue to encourage AAHSL to involve graduates in its programs, governance, etc, and consider other ways to provide post-program support

The committee has not completed its analysis of the study results. This is a summary of our review to date. We would be grateful for any feedback on these ideas, or other ideas we should consider. A report will be shared with NLM and others following the AAHSL Board meeting.