

NLM/AAHSL Leadership Fellows Program

**2017-2018
Report**

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HIGHLIGHTS

The AAHSL Future Leadership Committee (FLC) continues to actively promote the recruitment and development of first-class leaders in academic health sciences libraries, through activities in the areas of recruitment, education/training/mentoring, and research. Committee members worked on revising the application process and curricular activities for 2017/2018 and recommended major structural changes for 2018/2019 that were approved by the AAHSL Board and NLM.

Patricia Thibodeau became the program director for the 2017/2018 program. She worked with the prior director Carol Jenkins on selecting the new 2017/2018 class and transitioning the other Leadership Program responsibilities.

During the year the chairs met monthly with the program director and as needed with committee members using GlobalMeet conferencing, in order to oversee and coordinate committee work. A subcommittee of the FLC reviewed the application and selection processes for 2018/2019 and selected fellows and mentors for the 17th class that began in November 2018. The choices for fellows and mentors were subsequently approved by the AAHSL Board and NLM.

The Leadership Fellows Program (LFP) has completed 16 years. Its long-term success is the result of the support from its sponsors—NLM and AAHSL—and the contributions of fellows, mentors, and committee and AAHSL members. Former fellows Martha Earl (University of Tennessee Graduate School of Medicine), Stephanie Kerns (Dartmouth College), William Olmstadt (LSU Health, Shreveport), Dale Prince (Louisiana State University New Orleans), Melissa Rethlefsen (University of Florida), Philip Walker (Vanderbilt University) and Jeffrey Williams (New York University) assumed permanent director positions in 2018. Overall, 54% of Fellows have been named permanent directors since the program began. While not included in the above statistic, one new 2018/2019 fellow (Mellanye Lackey) has already been appointed to a health sciences library director's position effective in 2019.

The program completed the first year of NLM funding provided under a noncompetitive award that partially funds the Leadership Fellows Program. The award has the option of four succeeding years. AAHSL and Leadership Fellows Program remain very grateful for NLM's continued support and participation in the program.

Program Director

Patricia Thibodeau began her first year as the Program Director with 2017/2018 class. In this role she worked under the overall guidance of the committee chairs and was responsible for management of the Leadership Fellows Program (LFP) as well as management of all other committee responsibilities, serving as liaison with the full committee, and coordinating curricular activities and venue plans with the AAHSL Office. The Office continued to manage meeting logistics and expenditures for fellows and other committee activities. The committee used Basecamp to coordinate the program's activities including ensuring regular communications and fostering the fellow/mentor community. Basecamp also supports the FLCs activities including its new directors working group and the leadership fellows selection subcommittee. NLM provided access to its WebEx platform for the virtual interactive learning sessions with technical support provided by Region 2 NNLM staff members.

Assessment

An important metric for evaluation of the program is the transition of fellows to director positions. As of December 2018, 54% (44) of the Fellows have received permanent director appointments. In 2018 seven (7) former fellows assumed permanent director positions. One 2018/2019 fellow has been appointed to assume a director's position in 2019. (**Appendix A**)

A roster of director vacancies is maintained to augment vacancy postings on the AAHSL Web site. As of December 2018, there are 10 institutions with known current or pending vacancies in directors' positions. These include those actively recruiting, those with interim directors, and those new schools seeking LCME accreditation that have not yet hired directors. However, based on an AAHSL study of Director Workforce Trends in 2018, there is a possibility of 30 retirements over the next 5 years and a total of 70 possible retirements over the next 15 years. In addition, survey respondents indicated many deputy directors and other senior administrative staff would be retiring over the next 5 to 10 years as well.

With the selection of the incoming 2018/2019 class, 87 fellows and 68 different mentors will have participated in the program. Seventeen mentors will have served in this role two or more times and seven former fellows, now directors, will have also served as mentors. Well over 50% of AAHSL member institutions (n=96) have had at least one mentor or fellow on staff or have hired a fellow.

As noted in the October 2018 report, over the past ten years 23.5% (29.4% in 2016/17) of the fellow applicants have indicated a minority status since voluntary self-identification of ethnic or racial status was initiated. Two of the five selected fellows (2018/2019) are minority candidates, one Hispanic and one Native American Indian.

Two special assessments were conducted during 2018 to ensure specific demographics in the selection process were balanced. The review of data on gender among fellows revealed that the percentage of male and female fellows reflected the demographics of current AAHSL directors. Data was also collected on the regions of the country represented by the selected fellows. The data again showed that the selection process has been fairly balanced with only a minor under-representation from those in the Midwest region.

The Future Leadership Committee (FLC) reviewed the current structure to ensure that the program experiences and content prepared fellows for the changing roles and challenges facing today's directors. While the past structure of events and experiences has been successful, there has not been adequate time for deeper exploration of leadership topics or for self-reflection on learning and leadership styles. Leadership consultant and LFP faculty member Kathryn Deiss was asked to review the program and its content and she concluded that a more immersive approach would provide a better learning experience. In addition, a special survey was conducted regarding the structure of the program, seeking feedback from fellows and mentors from the previous five LFP classes. Based on that feedback, the FLC proposed a change in the structure for 2018/2019 -- moving to a three-day immersive Institute, having a single week for the site visit, and reducing the Capstone to two days. These changes were approved by the AAHSL Board and NLM.

The Future Leadership Committee continues to monitor participant satisfaction with the program's activities throughout the year and implements changes as a result of annual evaluations. The final program evaluation is conducted at the end of each class and provides feedback for making improvements and adjustments for the new class year. (**Appendix J**) Separate evaluations of the Orientation and Leadership Institute were also implemented this year to provide more immediate feedback.

The accomplishments for the 2017/2018 Leadership Fellows Program are described below.

2017/2018 Class: Year in Review

The sixteenth class completed its year on October 3, 2018 (**Appendix B**). Fellows (Amy Allison, Robin Champieux, Deidre Rios, Linda Van Keuren and Philip Walker) and mentors (Cynthia Robinson, Janice Jaguszewski, Barbara Cavanaugh, Brenda Seago, and Teresa Knott) worked together in fellow/mentor pairs.

The Leadership Fellow Program scheduled curricular activities and events throughout the year from the initial Orientation and mid-year Institute to the final Capstone and Graduation ceremony (**Appendix C**). An orientation session was also provided for mentors (**Appendix D**) through a conference call held after the AAHSL and AAMC annual meetings. Fellows communicated with each other and with their mentors on a frequent basis throughout the year. All fellows spent two one-week site visits at their mentors' home libraries, with visits anchored by their learning goals. Fellows 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 styles. They also shared their own perspectives with their mentors' staff. In their site visit reports, the fellows commented on the opportunities they had to observe their mentor and others in leadership roles, experience the operations and culture of a different health sciences library, gain a better understanding of the broader institutional context in which the library fits, and reflect on observed and preferred leadership styles.

Orientation

At its Orientation meeting on November 2, 2017, in Boston (**Appendix E**), the cohort met with committee faculty and consultant Kathryn Deiss (**Appendix I**). They discussed topics including intentional leadership, crafting a personal vision, and the mentoring relationship. Deiss, who has served as faculty to the program since its second year, administered two leadership questionnaires prior to the orientation meeting. She debriefed each respondent individually prior to the meeting and provided a group debrief of the leadership assessment tools at the Orientation.

The Orientation session continued to focus on boundary spanning skills and approaches, and on the NEXUS Lab Layers of Leadership that is linked to the fellows' learning plans. After the Orientation, fellows were asked to complete a self-assessment of leadership competencies using questions from Layers of Leadership D (multiple departments) and E (institution). Progress and growth in these competencies areas was assessed again through a post-test at the end of the year. Tips for a successful mentoring relationship were also presented.

Learning Plans

The individual fellow learning plans (**Appendix F**) 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. This year the plans also identified the competencies or skills being addressed using the Nexus Layers of Leadership. The learning plans help determine the focus of the site visits and how other program components can further achievement of their goals. Fellows share their plans with the cohort at the beginning of the year, and it is expected that plans may be modified during the year as needed.

Virtual learning

Building on the orientation and learning plans, the group met on a monthly basis in 2017/2018 through virtual interactive sessions using a webinar platform (included in the curriculum timeline in **Appendix C**). Mentors and their fellows developed virtual presentations and facilitated the discussion for the sessions. Topics covered were: strategic thinking (Rios and Seago); power and influence (Allison and Robinson); strategic resource allocation (Walker and Knott); and organizational structure and workforce development (Van Keuren and Cavanaugh). One virtual session was rescheduled due to an emergency and became an in-person discussion at the Capstone event: future of health science libraries (Champieux and Jaguszewski). Mark Puente, ARL Director of Diversity and Leadership Programs, also led a virtual discussion on diversity, inclusion and social justice, and faculty member Kathryn Deiss conducted a session on versatile leadership. This year fellows were very active in developing each session including assigning readings and activities to be completed before each webinar and identifying learning approaches that would ensure active participation by all the fellows. Mentors contributed their own experiences and perspectives to these discussions.

The committee relies on NN/LM regional libraries to provide technical support for virtual sessions and uses the WebEx platform provided by NLM. Thanks to MJ Tooley, Director; and Tony Nguyen and Colette Beaulieu of the Southeastern Atlantic Region of the NN/LM, who assisted with the leadership fellows' virtual sessions this year. The sessions were recorded, and the videos posted on the Program's Basecamp site.

Leadership Institute

The full-day Leadership Institute was held on May 19 and facilitated by Kathryn Deiss . It focused on developing leadership skills and practical career guidance for fellows as they prepare for director positions. This year the mock interview included a standardized set of questions and a feedback form. Former fellows Melissa De Santis, Director of the Health Sciences Library at the University of Colorado Anschutz Medical Campus and Chris Shaffer, University Librarian, at the University of California, San Francisco (UCSF), shared their recent experiences in interviewing, negotiations when offered the position, and their perspective as new directors. The Institute also included a guided discussion on organizational culture, the life of a director, and benefits and costs of leadership. A group activity on innovation was also part of the institute. (**Appendix G**)

Capstone

The 2017/2018 class met for the final time at the Capstone in Washington, DC, October 1 to 3, 2018 (**Appendix H**). The Capstone sessions introduce fellows to the major national associations and organizations involved in the health sciences, and the policies, priorities and initiatives that have an impact on academic health centers and health sciences libraries. Representatives from NLM, NIH, AAMC, LC, NAL, SPARC, ARL, AACN, AACP, PAEA, AMIA, and AAHSL met with the group. Issues of current priority for academic health sciences libraries include information policy and funding, scholarly communication, data management, the changing role of national libraries, NLM initiatives and operations, interprofessional education and team-based care, and diversity. Presenters included those who regularly come to the Capstone as well as some first-time speakers: Mary Lee Kennedy, Prudence Adler, Kris Cox and Judy Ruttenberg (all from ARL), Heather Joseph (SPARC), Kathy McGuinn (AACN), Lucinda Maine (AACP), Howard Straker (PAEA) Heather Sacks, Tannaz Rasouli and Eric Weissman (all from AAMC), Keith Cogdill, James King, Chris Belter, Lynn Young and Doug Joubert (all from NIH Library), Mark Sweeney (LC), Jennifer Merrill (NLM) and Stan Kosecki (NAL), Mike Huerta, Lisa Federer, Dina Paltoo, Dianne Babski, Amanda Wilson (all from NLM). A highlight was the opportunity for fellows' conversation with Dr. Patricia Flatley Brennan, NLM Director and Jerry Sheehan, Deputy Director. In addition to strengthening ties with AAHSL, the speakers sparked thoughtful discussions of the strategic priorities and initiatives being pursued by national organizations.

A reception and graduation ceremony on the final evening of the Capstone recognized the achievement of the fellows and mentors and was attended by meeting participants, speakers and local library leaders from the area. There were about 32 attendees.

A final evaluation of the entire program was conducted after the Capstone activities were completed. (**Appendix J**)

Goals FY18-19

The Future Leadership Committee will continue to: maintain the strength and diversity of the candidate pools and the cohort; implement improvements based on evaluations; enhance the program content and design, focusing on improving the effectiveness of virtual sessions and face to face time; facilitate cohort cohesion; and assess the continuum of leadership development programs culminating in the Leadership Fellows Program (LFP). The Leadership Institute will be redesigned into a three-day immersive event held prior to MLA on May 2 through 4 2019. The Capstone event will be shortened to two days and only one site visit be scheduled to the mentor's institution. The FLC will evaluate the effectiveness of these changes over the year. The FLC will also consider the final recommendations from the New Directors Working Group and identify next steps within AAHSL for addressing the needs of new or interim directors. Committee members will work on revisions to the 2019/2020 application information and will evaluate the effectiveness of the current brochure on recruiting a health sciences director.