

NLM/AAHSL Leadership Fellows Program

2012-2013 Report

Note: Appendices are not included with this version of the document.

Highlights

The NLM/AAHSL Leadership Fellows Program completed eleven years in 2012-2013. Successful from its beginning, the program has continued to evolve and build on that foundation to increase its impact in the profession. Thanks to the strong support of the sponsors—the National Library of Medicine and the Association of Academic Health Sciences Libraries—and 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.

As libraries continue to operate in a climate of challenging economic conditions and organizational change, the program is able to adapt and give fellows perspective on responses to the environment. The virtual curriculum component was significantly revised during the year, and the career guidance aspect of the Leadership Institute at MLA was re-examined. The curriculum takes advantage of the experience of the mentors and the expertise of faculty Kathryn Deiss and DeEtta Jones in shaping the content.

An important metric for evaluation of the program is the transition of fellows to director positions. To date, 23 of 55 fellow graduates have received director appointments. During 2013, Jennifer McKinnell (McMaster University) and Charles Greenberg (Wenzhou-Kean University) will have assumed director positions. Recruiters continue to draw on the program as a source for candidates. Overall, 35 former fellows (64%) have been promoted to director or other positions of higher responsibility (**Appendix A**).

With a growing body of participants, AAHSL undertook an evaluation study 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. Over the course of the upcoming year, the committee plans to report on the study further and to examine and incorporate study results to inform enhancements to the program. Additional details on the study are included below on p. 5.

With the incoming 2013-2014 class, 61 fellows and 52 different mentors will have taken part in the program. Well over half of AAHSL institutions (58% of full U.S. members and 54% of all full members) have had either a mentor or fellow on staff or have hired a fellow, with many participating in more than one category. For the first time, the cohort size will be increased to include six fellows.

As noted in the report in September, 24% of fellow applicants and 27% of selected fellows have indicated minority status in the last eight years (since voluntary self-identification of ethnic or

racial status was initiated). For the first time, a mentor in the 2012-2013 cohort (Heidi Heilemann) was a fellow graduate, an indication of the maturing of the program; a second former fellow (Jerry Perry) will be a mentor in the 2013-2014 class.

A roster of director vacancies is maintained, to augment a 2012 AAHSL member survey on projected vacancies showing that 40 current directors intended to retire within the next five years. In 2013, up to 16 existing institutions at a time were recruiting or had vacant positions or interim appointments. Seven new medical schools in the LCME approval process did not yet have director appointments. These statistics show an ongoing need for the program, while the trend of new schools influences future planning.

Carolyn Lipscomb resigns as committee program manager November 1 after nearly thirteen years in the position. Incoming program manager Carol Jenkins began work with the committee September 1 to assure a smooth transition and will assume sole responsibility in November. The program is fortunate that Jenkins will take on this role with her deep knowledge and experience as former committee co-chair and program mentor (**Appendix J**).

2012-2013 Class: Year in Review

The eleventh class of fellows and mentors (**Appendix B**) participated in the program during the period from September 2012 through October 2013. Five fellows were selected from a strong pool of 23 applicants (a 35% increase over the previous year), 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 from a pool of eight current directors who had volunteered, 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 had a blend of four mentors participating in the program for the first time and one director who previously served as mentor.

The cohort of fellows and mentors met together with faculty and AAHSL Future Leadership Committee leadership and program manager 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. The **schedule of program components** is listed in **Appendix C**.

- **Orientation and AAMC meeting:** The orientation (**Appendix D**) for the 2012-2013 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 Joyce Backus greeted the cohort on behalf of NLM. Mentor Neil Rambo was unable to be present for the meeting due to the emergency at his library caused by storm flooding. Judy Cohn substituted for him during the Orientation, and committee leadership subsequently held conversations with Rambo to bring him up to date and to foster building the relationship with his fellow. A brief visit was funded for the fellow, Melissa De Santis, so that fellow and mentor could meet in person in Chicago.

- **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. The virtual curriculum was significantly revised this year. Four of the six journal club topics changed to take advantage of cohort experience or evolving issues. Topics presented were: power and influence, workforce issues, enhanced library roles, managerial finance, diversity and inclusion, and crisis management. Mentors, along with Jones, assumed responsibility for developing and presenting the sessions and facilitating discussion. The sessions stress strategic-level thinking at the director level, which is reinforced through the assignments. Fellows were asked to undertake substantive preparation, including readings, response to scenarios, and investigation. 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 institute program (**Appendix F**) focused on practical career guidance for fellows as they prepare for director positions. A mock interview exercise was reinstated due to feedback from former fellows. 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. Fellow graduates, Heilemann of Stanford University, and Tania Bardyn, University of Washington, were interviewed as a guest panel, describing their recent experience in being appointed director and their transition to the role. The institute also included a

guided discussion on organizational culture, the life of a director, and benefits and costs of leadership.

- **Capstone:** The 2012-2013 class met for the final time at the Capstone (**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, AAMC, LC, NAL, IMLS, SPARC, U.S. Congress, AACN, AMIA, and AAHSL offered their time to meet with the group. The federal government shutdown on the second day directly impacted the Capstone and mandated changes to the schedule, lending immediacy to the political environment, while the group benefited from the generosity of individual colleagues. Some of the issues crossing organizational lines were information policy and funding, scholarly communication, interprofessional education, and collaboration among national libraries. Sessions this year included a meeting with high-level representatives of the three national libraries; for the first time, a legislative aide from Capitol Hill joined the discussion on scholarly communication legislation. Presenters included those who regularly come to the Capstone as well as first-time speakers; their participation seems to strengthen their relationship with AAHSL, in addition to the benefit for the fellows. M.J. Tooley, 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 format design 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.

Capstone speakers and area library leaders were among the invitees to the **reception and graduation ceremony** on the final night, which honors the cohort. Fellows and mentors supplied names of institutional representatives and colleagues so that AAHSL could send invitations and note their completion of the program. Julia Sollenberger, Jones, Betsy Humphreys, Donald Lindberg, and Tooley recognized their achievement on behalf of the sponsoring organizations, and Donna Berryman and Paul Schoening represented the fellows and mentors in describing their experience. About 35 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. The visit agendas are anchored by the learning goals of the fellow.

Each site visit is unique, depending on the possibilities at the institution and on the fellow's interests and goals. Fellows are able to meet a range of library staff and university or institution officials, participate in and observe library and university meetings and decision making, attend special events, and gain a sense of their mentors' leadership style in his or her organization. Depending on the location, fellows may be able to visit other libraries and directors in the area. The fellows share their expertise and give presentations during the site visits, and the library can benefit from the perspective of the fellows. The site visits are important to fellows in developing the relationship with the mentor, building a network of contacts, gaining ideas to incorporate in their current positions, and expanding their vision. Fellows write reports of their site visits to share with the other fellows and mentors and to extend the value of the visits to the cohort. In addition, fellows and mentors communicate with each other on a regular basis and spend time together at MLA or other events.

- **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 **Appendices H and I**. 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

AAHSL contracted with Nancy LaPelle, PhD, to design and conduct a qualitative evaluation study 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 is now reviewing the consultant's report and preparing a cover memorandum and executive summary to accompany the report. It plans to examine results and identify recommendations in the upcoming year.

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, with about 65 in attendance at the Colonnade Hotel in Boston. The reunion is part of the goal to develop a long-term community across cohort lines among the participants in the program.

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 or Jones is available on an as-needed basis, which the committee identifies and approves.

New mentors will meet with committee leadership (who are all former mentors or fellows) during the AAMC Annual Meeting in Philadelphia for a Mentors Orientation to share their experiences and expectations. Topics include 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; review the evaluation study and identify and implement resulting recommendations; continue to enhance program content and design, focusing on: continuity of components, building on revised virtual topics, augmentation of career advice, and active fellow participation; facilitate cohort cohesion; support mentors and fellow-mentor pairs; 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.

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:

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