

## **NLM/AAHSL Leadership Fellows Program 2004-2005 Report**

The National Library of Medicine/Association of Academic Health Sciences Libraries Leadership Fellows Program began its third year with the announcement that NLM would support another three years of the program. This commitment spoke to the success of the program and the desire to continue to build the pool of future library directors and to test the impact of the program. The program model—with its combination of mentoring and in-person and virtual learning opportunities—will be evaluated through a study next year that NLM will also back.

The third class of fellows and mentors participated in the program during the period from November 2004 through November 2005. Five fellows were selected from a competitive pool of twenty-four applicants, based on their interest in pursuing a directorship in academic health center libraries and their record of leadership initiative and potential. They were paired with mentors from an exceptionally large pool of thirteen 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. When Jean Sayre was unable to continue as mentor due to illness, Nancy Roderer replaced her. The 2004-2005 roster of fellows and mentors is included as **Appendix A**.

The cohort of fellows and mentors met together with Association of Research Libraries faculty and AAHSL Future Leadership Task Force co-chairs and project manager at three points during the year: for a daylong Orientation in conjunction with the Association of American Medical Colleges Annual Meeting; a half-day Leadership Institute at the Medical Library Association Annual Meeting; and a three-day 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. In addition, fellows completed three ARL Online Lyceum courses and a leadership profile, with mentors facilitating and participating in follow-up conference calls. The group engaged in active electronic communication on their list throughout the year, discussing topics and publications of interest. The schedule of program components is listed in **Appendix B**.

The Orientation included discussions on leadership in context, current reality and possible future of academic health sciences libraries, and mentoring behaviors, as well as program expectations. As all mentors could be present, productive time was spent working in mentor/fellow pairs in addition to working as a group. Fellows and mentors began the process of developing their Fellow Learning Plans. Mentors were also able to get together individually with their fellows during the AAMC Annual Meeting and to guide the fellows to take best advantage of the conference.

The individual Fellow Learning Plans are an important tool in shaping the year. In consultation 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, and they can be modified during the course of the year. Fellows shared their plans with the cohort at the beginning of the year; at the conclusion of the program, fellows and mentors were asked to review the plans. The learning plans are in **Appendix C**.

In response to input from past and current participants, the Leadership Institute this year focused on practical career guidance drawn from mentor experience. Simulated director interviews paired fellows with mentors other than their own; fellows were given the opportunity to prepare for the interviews in advance, and mentors played the role of their medical school deans. Linda Watson joined the group to describe her recent experience in seeking her new position at the University of Minnesota. The group also discussed an article on versatile leadership. DeEtta Jones and Kathryn Deiss of ARL led the Orientation and Leadership Institute.

The program expanded its effort to build connections among program classes. The first reunion of all former and current fellows and mentors occurred in San Antonio. Twenty-two attended a reception and took part in a discussion led by Scott Plutchak. The reunion is an effort to explore the development of a long-term community among the participants in the program. Individual mentors and fellows and cohorts are also continuing to stay in touch with one another. The second-year fellows worked during the year on an article on how the program has shaped their career goals and preparation.

The Capstone event was again focused on introducing fellows to the role of organizations important to academic health centers and their key players and on external issues shaping libraries and their implications for directors. Speakers from NLM, AAHSL, AAMC, ARL and SPARC, and Health and Medicine Counsel of Washington again generously gave of their time to meet with the group and discuss organizational initiatives and issues. In addition, speakers from the Institute of Museum and Library Services and the Association of Academic Health Centers were added to the agenda. A panel from Library Operations augmented the NLM portion of the schedule to represent library functions more fully. The AAHSL president again attended the Capstone for a day to lead a session and to participate in discussion. The format design to encourage active involvement of the fellows in the event included discussion time with the core group of fellows, mentors, and faculty to supplement the outside presentations. Mentors and the task force chairs were assigned facilitator roles for each session, with responsibility for communicating with speakers in advance, setting up the session to prepare fellows, guiding the session, and leading a post-session discussion. Shelley Bader joined the group to set up the AAMC session. The discussion periods also allowed time to reflect on the experiences of the year and gave program organizers a better sense of the participants' evaluation and suggestions. The Capstone included social events providing the chance to spend time as a group. Both fellows and mentors felt the Capstone was a highlight of the program, with the opportunity for extended intensive discussion and for personal meetings with significant individuals.

Since the Capstone preceded the AAMC Annual Meeting, the reception and graduation ceremony on the last evening was attended by fellows and mentors from the incoming class and by a number of directors arriving for the conference, in addition to other invitees. Fellows and mentors supplied names of institutional representatives so that AAHSL could send invitations and note their completion of the program. The celebration reinforced the honor of participation in the program. Betsy Humphreys and Michael Homan recognized their achievement on behalf of the sponsoring organizations, and Judy Burnham and Brett Kirkpatrick represented the fellows and mentors in describing their experience. The agenda for the Capstone and graduation program are contained in **Appendix D** and the Burnham and Kirkpatrick remarks in **Appendix E**.

The site visits were again the prominent 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. Each site visit is unique, depending on the possibilities at the institution and on the fellow's interests and learning goals. Fellows typically meet a range of library staff, institutional administrators, area librarians, and others, and they are exposed to issues, projects, and the leadership style of their mentor in his or her organization. They expand their professional networks, while the library can benefit from the perspective of the fellows. Fellows write reports of their site visits to share with the other fellows and mentors via the list. Some mentors have been able to visit their fellows at the fellow's institution, a valuable way to extend the relationship.

The mentors continue to be the backbone 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. Mentors expressed that they benefit from the program as well and appreciate the opportunity to reflect and to learn from the cohort. As noted above, an unfortunate development was the inability of one of the mentors to continue in her role; the program benefited from a past mentor stepping in, and it supported her travel to meet the fellow and facilitate the transition. The mentors from the first three classes met together at the AAMC meeting at the beginning of the year in an informal "mentor the mentors" session, to share experiences about the role of the mentors and what worked well and what didn't. The task force co-chairs also participate in many of the program components, supplying additional perspective as directors and former mentors.

The chat sessions for the Online Lyceum courses were replaced this year by conference calls for fellows and mentors to discuss course content and application in academic health sciences libraries. An exercise was added to the curriculum, a leadership profile from PeopleAssets, which fellows and mentors took to analyze their traits and to compare themselves with a profile of library leaders. Mentors took turns in facilitating the calls after the courses and self-assessment tool. The electronic communication on the list was active and rich, due to the initiative of participants.

The summary evaluations from fellows and mentors are attached as **Appendices F and G** [omitted from this version]. They speak highly of their experience and the perceived value of the program. The Future Leadership Task Force plans to consider several recurring suggestions for changes to the program, including adding content for topics such as budgeting and planning facilities, building in chances for more informal contact among cohort members earlier in the program year, and structured review of learning plans midway through the year. In consultation with NLM, the task force will also be examining alternative sources for program content and facilitation to replace ARL's contributions in response to their strategic changes. ARL has agreed to continue its current commitment for the 2005-2006 program, and AAHSL has already assumed more program management responsibility.

At the request of NLM, the task force presented a proposal to NLM to support an evaluation of the first three years of the program, and it was funded. AAHSL will work with consultants to gather data from fellows, mentors, home directors, and key individuals through focus groups and interviews. The evaluation will assess the effectiveness of the teams constituting the various relationships and the impact of the program. It will occur during 2006 with a final report in 2007.

Long-term evaluation of the program will track the careers of fellows. To date, five fellows from the first three classes have received promotions to positions of higher responsibility. One has assumed a director position; the others have moved to positions of deputy director, associate director, and two to associate director for public services.

Recognition of the program is evident from the continued interest within AAHSL and the library community. A large number of excellent applications were received for fellow in the 2005-2006 class, and AAHSL directors remained very supportive of the program. Due to requests from AAHSL membership to benefit from such a program, the Future Leadership Task Force is planning a pilot program for new directors in 2006 that will incorporate some elements of the NLM/AAHSL Leadership Fellows Program.

AAHSL is grateful for NLM's support, both financial and on the part of staff members who participate in events such as the Capstone and who work with AAHSL to plan the program. We look forward to continuing the collaboration.

Submitted by:

Carol G. Jenkins  
Wayne J. Peay  
Co-Chairs, AAHSL Future Leadership Task Force

Carolyn E. Lipscomb  
Project Manager, AAHSL Future Leadership Task Force

12/23/05

## Appendix A

### 2004-2005 NLM/AAHSL Leadership Fellows Program

#### **Susan Gerding Bader**

Director, Learning Resource Center, Baylor University School of Nursing

*Mentors:*

#### **Nancy Roderer**

Director, Welch Medical Library

Associate Professor and Interim Director, Division of Health Sciences Informatics

Johns Hopkins University

#### **Jean Williams Sayre**

Director, Hardin Library for the Health Sciences, University of Iowa

#### **Judy Burnham**

Associate Director

Biomedical Library, University of South Alabama

*Mentor: Brett Kirkpatrick*

Associate Vice President for Academic Resources and Director of Libraries

University of Texas Medical Branch, Galveston

#### **Beth Layton**

Deputy Director

Health Science Center Libraries, University of Florida

*Mentor: William Garrity*

Director of Biomedical Libraries

Dartmouth College/Dartmouth Medical School and

Dartmouth-Hitchcock Medical Center

#### **Dawn M. Littleton**

Head, Public Services

Mayo Clinic Libraries

*Mentor: Rick Forsman*

Director, Denison Memorial Library

University of Colorado Health Sciences Center

#### **Jett McCann**

Assistant Director/Resources Management Services

Libraries and Learning Resource Center

Medical University of South Carolina

*Mentor: Patricia Thibodeau*

Associate Dean for Library Services & Archives

Duke University Medical Center

## Appendix B

### 2004-2005 NLM/AAHSL Leadership Fellows Program Schedule

November 5, 2004	Orientation, Boston MA
November 7	Mentor the Mentors discussion, Boston MA
November 5-10	AAMC Annual Meeting, Boston MA
January 24 – February 11, 2005	Online Lyceum Course: Motivation, Performance & Commitment
Week of January 24	Littleton site visit to Colorado
February 18 – March 29	Leadership profile exercise
Week of February 28	Burnham site visit to Galveston
April 4-22	Online Lyceum Course: Library Fund Development
Week of April 4	Layton site visit to Dartmouth Bader site visit to Hopkins
Week of April 11	McCann site visit to Duke
May 14	Leadership Fellows Program Reunion, MLA Annual Meeting, San Antonio TX
May 19	Leadership Institute, MLA Annual Meeting, San Antonio TX
Week of May 30	Bader site visit to Hopkins
Week of July 18	Burnham site visit to Galveston
August 1-19	Online Lyceum Course: Power Dynamics & Influencing Skills
Week of August 19	Layton site visit to Dartmouth
Week of August 22	McCann site visit to Duke Littleton site visit to Colorado
November 1-3	Capstone, Washington DC
November 3	Reception and Graduation Ceremony, Washington DC

## Appendix C

### Fellow Learning Plans

Susan Bader

#### ***Learning goal #1***

*I would like to learn more about:*  
Strategic planning

*This learning goal is important to me because:*  
I tend not to take a long view, and be more reactive than proactive. The term itself is scary, perhaps because I don't really understand it. I haven't experienced either the process or the results.

*In order to accomplish this goal I will need:*  
Guidance on what to read  
Samples of strategic plans  
Actual participation in part of a planning process

*My definition of success is:*  
Confidence to begin the process  
A plan for strategic planning here in the LRC at the School of Nursing

#### ***Learning goal #2***

*I would like to learn more about:*  
The nature and effective use of organizational politics, laterally and upward

*This learning goal is important to me because:*  
Politics is the lifeblood of an organization. It is how big things get done and how things get stopped. Coalitions and alliances can work for or against a leader (especially a library director) on personal, departmental, and organizational levels.

*In order to accomplish this goal I will need:*  
Practical exposure to organizational structure and the power players in both my institution and my mentor's institution.

Recommendations of readings on the topic.

Discussions of political situations and experiences at both my institution and my mentor's institution.

*My definition of success is:*

I won't run away when I see the Dean, Associate Dean, CIO, or Provost because my confidence will be greater.

***Learning goal #3***

*I would like to learn more about:*

Implementing new technologies. (This might also include managing change.)

*This learning goal is important to me because:*

It is critical to my current job, and a part of the contemporary library director's role. Libraries are evolving, health care is changing, and information delivery is changing.

*In order to accomplish this goal I will need:*

To meet and interview people at all levels, from high ranking faculty and administrators to grassroots, front line staff who carry out the work. At Baylor: Tim Logan, Richard Gerik, Reagan Ramsower, Vicki Gerik, Viola Armstrong, Bob Hartland. At mentor's institution: to be determined prior to first site visit and revised afterward

Suggested readings.

Study specific examples both my institution and my mentor's institution.

*My definition of success is:*

I will have a clear picture of how to define the technological problem and see solutions or to be able to identify those with expertise who can contribute to the successful implementation.



## Fellow Learning Plan

Name: Judy Burnham

Date: December 15, 2004

### **Goal #1**

*I would like to learn more about:*

Financial matters including budgeting and budget analysis and fundraising

*This learning goal is important to me because:*

An important part of planning for a health sciences library is the budgeting process and budget analysis. The budget directs the financial direction of the library and guides decisions on purchases and goals. Analysis of the budget will help to determine needs and establish priorities for how we will use the available funds.

As contributions from traditional resources shrink, it becomes even more important to identify and pursue additional sources of funding. Although I have written or helped to write several successful grants (and some not successful) I would like to be able to identify additional sources for grants and other sources of funding.

*In order to accomplish this goal I will need (resources)*

Consult with mentor, resource people at my institution and the literature.  
Online course on fundraising.

*The specific steps I will take are:*

- Consulting with mentor on method of budget development and analysis at his institution.
- Consult with USA COM Business Office for advice on budget development and analysis. Try to obtain a clear understanding of how funding flows within the USA COM.
- Consult with USA Mitchell College of Business faculty on budget development and analysis.
- Online course on fundraising taken as part of Fellows Program.
- Consulting with my mentor as he conducts a fundraising project at his institution.
- Meet with development officer at USA
- Meet with Grants & Contracts officers at USA
- Retrieval of literature on budget development and analysis.

*My definition of success is:*

- More confidence in budget development and with analyzing the expenditures to determine how the budget should be modified in the future.
- Able to articulate a specific process for analyzing needs and assigning costs and priorities.
- Gain a better understanding of fundraising sources, including grants and methods to obtain funds from those sources.
- Able to identify local projects and activities suitable for funding, and able to identify potential sources of local funding.

## **Goal #2**

*I would like to learn more about:*

Leadership in the university (outside the library)

*This learning goal is important to me because:*

In order for the library to be seen by other faculty as an integrated part of the institution, it is important for the librarians to take an active leadership role in the institution. Also, the continued success of the library is dependent upon demonstrating that it and its leadership are relevant and critical to meeting institutional needs.

*In order to accomplish this goal I will need (resources)*

Information from library leaders on their leadership role at their institution.

*The specific steps I will take are:*

- Consult with mentor on his leadership role at his institution, and discuss and evaluate potential opportunities at USA.
- Interview other mentors in Fellows program
- Conduct mini-survey of AAHSL directors who have additional duties concerning their leadership role at their institution.
- Online course on Power Dynamics and Influencing
- Retrieve and review literature on librarians who serve in leadership roles outside the library.

*My definition of success is:*

- Have a better understanding of the current roles library directors are taking outside of their libraries. This will give me guidance on how to take a leadership role in the institution outside my library as well.
- Able to identify USA opportunities and assess relative merits of each.

### **Goal #3**

*I would like to learn more about:*

Technology adoption

*This learning goal is important to me because:*

Health science libraries need to know the optimal time to adopt new technology – when it is cutting edge, but not bleeding edge.

*In order to accomplish this goal I will need (resources)*

I will need to consult with my mentor and other AAHSL directors concerning their criteria for technology adoption

*The specific steps I will take are:*

- Conduct mini-survey of AAHSL directors concerning technology adoption.
- Develop techniques needed to scan the horizon and recognize technology that would be applicable to my library.
- Develop skills needed to recognize specific utilization for new technology in my library.
- Determine funding resources for new technology
- Develop close working relationships with USA information technology leadership and staff.

*My definition of success is:*

- Be more aware of new technology that is being developed and how these might be used in the library.
- Feel more comfortable with determining which tools would be applicable for my library and be able to identify those that are marketed well, but are not really needed.
- Able to identify and evaluate two USA COM opportunities for technology adoption in the coming year.

Beth Layton

## **Learning Goal 1**

**I would like to learn more about:** managing staff.

**This goal is important to me because:**

A manager gets things done through people. This is the most challenging thing a manager/leader does and it is often the most rewarding. I also manage supervisors that supervise others; it is invaluable to assist them in managing staff.

**In order to accomplish this goal I will need:**

Sharing of styles, ideas and different approaches from others through the ARL online class and other venues.

Perseverance

Support from colleagues especially supervisor

**Specific steps I will take are:**

Writing up the case study. [Special note: Bill and I have agreed to do a real case study involving a staff issue. We will formally discuss this issue during our meetings. That way I will be able to try different approaches.]

Identifying other situations for discussion.

Discussing during meetings with Bill and through e-mails/discussions with the mentor/protégée group.

Read management articles, especially those from Harvard Business Review. Bill will suggest some items.

**My definition of success is:**

Some different strategies or ways of approaching staff management issues.

## **Learning Goal 2**

**I would like to learn more about:** informatics projects.

**This goal is important to me because:**

I want to make a real difference locally and nationally in delivery of information in the health care environment. This health center has faculty who are aware of the possibilities of informatics initiatives. However, the hospital system has never provided recurring funding for librarian programs.

**In order to accomplish this goal I will need:**

Greater knowledge of informatics programs

**Specific steps I will take are:**

I will review what has been done at other institutions by looking at the IAIMS consortium website.

Bill and I will look at my notes from the IAIMS consortium website and decide what may be transferable from other institutions to this library.

Identify informatics courses or programs to attend. Investigate attending.

**My definition of success is:**

Greater understanding of the possibilities of informatics.

Ideas on how to create opportunities for informatics programs here at UF.

### **Learning Goal 3**

**I would like to learn more about:** securing grant funding.

**This goal is important to me because:**

We need funding (recurring and one time) in order to create a better environment or work on special projects (like informatics). Initially I wanted this to be a general goal about funding but then realized that I needed a more specific focus.

**In order to accomplish this goal I will need:**

Education on preparing grants.

Time to prepare grant

**Specific steps I will take are:**

To identify possible informatic grants.

From Goal 2, I will identify an idea for funding.

Work with colleagues (identified in goal 2) on reviewing funding.

I will identify others at the University of Florida who are interested in this area.

I will work on the grant.

**My definition of success is:**

Identifying possible grant funding.

With others at this institution, preparing a grant, ideally a grant for over \$50,000.

## FELLOW LEARNING PLAN

Name: Dawn M. Littleton Date: December 27, 2004,

Select three learning goals that you would like 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. You will be asked to share this learning plan with your mentor during your one-on-one meeting in Washington.

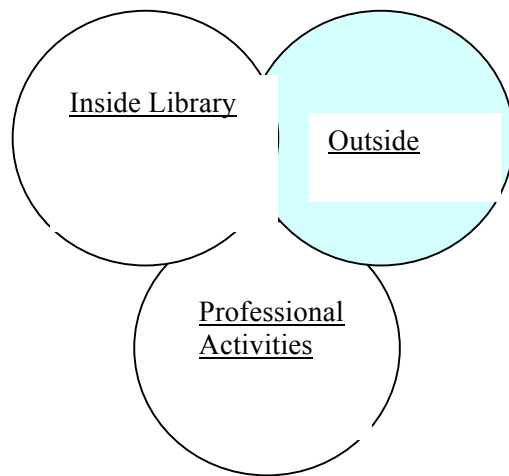
Please try to frame the objectives according to the Leadership Fellows Program's intended outcomes. The Program is designed to:

- Introduce emerging academic health sciences library leaders to leadership theory and practical tools for implementing change at organizational and professional levels.
- Develop meaningful professional relationships between fellows and current directors through mentoring partnerships.
- Expose fellows to another academic health sciences library under the guidance of their mentors.
- Create a cohort of learners who will draw upon each other for support throughout their careers.
- Offer recognition to emerging leaders.

## Learning Goal 1

I would like to learn more about:

A framework of what is needed in library leadership



### **Inside Library:**

Includes seeing and managing staff, systems and resources of the library. (How does this differ from my current position?)

### **Outside Library but within the Institution:**

Includes what is to be expected of deans, administrators, the larger Systems network, as well as liaisons with institutional departments.

What do deans, administrators, etc. expect of the library? Of the library director?

### **Professional Activities:**

e.g., how to work reasonably and rationally in positively affecting the profession as well as local/national internal library environments.

**This learning goal is important to me because:**



I feel this is needed to evaluate my strengths and weaknesses, that this goal should identify and address what I need to strengthen. And for a future position I want to learn what to avoid and how to avoid.

**In order to accomplish this goal I will need:**

Mentor feedback and reviewing some research

To review what gives me self-satisfaction and sense of accomplishment

To consider engaging in a 'case study' in second half of the year – analyze a director vacancy and plan an application

**My definition of success is:**

I will have confidence in what I know and understand, and what I need to develop. An understanding of what external library colleagues in the organization expect of the director.

## Learning Goal 2

I would like to learn more about:

Developing strategic financing planning strategies.  
How planning and/or arguments for any resources  
(Money, political support, space, grants) are made.

This learning goal is important to me because:

Leading a library requires not only funding but political support.

In order to accomplish this goal I will need:

- Mentor and director can share perspectives on budget proposals
- What has worked and why
- What has not worked and why
- Along with online lyceum

My definition of success is:

Create several strategic budgets for Mayo Clinic Libraries.

### Learning Goal 3

I would like to learn more about:

Library fundraising (advocating library value to stakeholders)

This learning goal is important to me because:

I know that Library success is related to financial and political success.

In order to accomplish this goal I will need (resources):

Using the Online Lyceum courses on fundraising. And learn case histories of what has worked/not worked from mentor and current boss.

Mentor will be able to give me ideas about how to develop my skills, and seek additional training/experience.

The specific steps I will take are:

- Completing the Library Fund Development online course
- Meet with fund development officer at my home university
- Meet with fund development officer at my mentor's home university/library
- Have focused conversation with mentor, to learn about fundraising strategies that have worked well for him and solicit advice on professional development opportunities that would develop my skills and confidence
- Meet library donor in Colorado to explore reasons for giving

My definition of success is:

I will be able to verbalize problem-based scenarios at a level that reflects the mission of the library director:

Scenarios include:

Budget set-backs, and/or surprise funding  
Maneuvering successfully through political landmines,  
Know when/when not to discuss issues with users, other stakeholders, etc.  
Understand the development structure and process in home institution

## Mentor's Mission Statement

I am committed to helping Dawn achieve her objectives and attain the personal fulfillment she desires. I will:

Offer solid support and encouragement to strengthen her courage in stretching and learning. Offer perspective and factual information on various choices and possible paths to the same ends.

Be as concrete as possible yet sensitive to openness in considering options.

Be honest in demonstrating approaches to problem solving, including acknowledgement of both good and bad aspects of how I work.

Articulate the necessary balance of professional life and personal interests.

Arrange for others to share their expertise and experience.

Express appreciation that this relationship allows me to learn as well.

## AAHSL FELLOW LEARNING PLAN

NAME: Jett McCann

### LEARNING GOAL 1

#### **I would like to learn more about:**

what directors do

We all think we know what an HSL director does – what their job entails, where they expend their energies and how they determine if and when they are successful, but until you are a director, you can only surmise based on observation.

We rarely have the chance to actually hear from a director what they do in the library, in the institution, and external to the institution – and what gives them a sense of accomplishment and job satisfaction.

#### **This learning goal is important to me because:**

Frankly, I need to determine if this is really what I want to pursue – what I really want to be, or am I just listening to ego and the urging of others.

#### **In order to accomplish this goal I will need:**

The opportunity to shadow at least one director – find out about a “director’s day”

- what activities they engage in
- which are most common/frequent
- what they see as most important / least important but necessary
- what they see as most time-consuming
- what they see as most pleasing/rewarding/satisfying personally & professionally
- what they see as most difficult/challenging/annoying
- what skills and abilities they see as most vital
- what they see as expectations of the library & director by deans, administrators, staff

#### **My definition of success is:**

A clearer understanding the role a director has in the library and in the institution and ultimately deciding whether or not I want be a director and whether or not to pursue directorship opportunities when they exist.

## **AAHSL FELLOW LEARNING PLAN**

**NAME:** Jett McCann

### **LEARNING GOAL 2**

#### **I would like to learn more about:**

evaluating leadership opportunities as they become available – how a current director [or directors] decided the open position was right for him/her AND the library

I need to learn how to honestly and intelligently evaluate an open directorship – how to analyze an opening and know it would be a good fit for all concerned.

#### **This learning goal is important to me because:**

Aside from the obvious desire to succeed if this is the path I choose, I'm 53; if I do become a director, it will probably be my final library position, and it needs to be a good fit.

#### **In order to accomplish this goal I will need:**

- understanding the process – nominating, applying, interviewing
- guidance on networking – how to truly evaluate the current situation at an institution, how the library fits in, dynamics of the reporting relationships
- help identifying my own strengths and weaknesses
- guidance on how to mesh my those strengths & weaknesses and skills & talents with those needed by an institution

#### **My definition of success is:**

Gaining confidence in my ability to match myself to vacancies; what to emphasize, what to improve and develop.

## **AAHSL FELLOW LEARNING PLAN**

**NAME:** Jett McCann

### **LEARNING GOAL 3**

#### **I would like to learn more about:**

Making / keeping the library relevant to the institution – the faculty, staff and students

#### **This learning goal is important to me because:**

- understanding the present and ever-changing role of the library is vital to success in my current job and any future job.
- increase value of the library program

#### **In order to accomplish this goal I will need:**

- evaluate how my current library and my mentor's library are part of the institutional fabric
- to compare the two and to learn from their similarities and their differences
- understand how [and if] they are tied to institution's priorities
- identify areas where improvement is needed – and what the possibilities for improvement are
- understand the political realities and how each director works within known boundaries

#### **My definition of success is:**

A clearer picture of the role of the library on campus, and how the director can affect that role.

## Appendix D

### NLM/AAHSL Leadership Fellows Program

#### CAPSTONE AGENDA

November 1-3, 2005  
Washington, DC

#### Tuesday

*ARL, 21 Dupont Circle, NW, Suite 800*

8:30 am –	Continental breakfast	
9:00 – 10:15 am	Welcome and Capstone overview Setup for Legislative advocacy session	DeEtta Jones Wayne Peay
10:15 – 10:30 am	Break	
10:30 am – 12:30 pm	Panel: Legislative advocacy	Dale Dirks President, Health and Medicine Counsel of Washington  Prudence Adler Associate Executive Director, Federal Relations and Information Policy, ARL  Jane Griffith (Former) Assistant Director for Policy Development/ Acting Deputy Director, NLM  Wayne Peay Facilitator
12:30 – 2:00 pm	Lunch Setup for AAMC session	Shelley Bader Associate Vice President Educational Resources George Washington University Medical Center Brett Kirkpatrick



***AAMC, 2450 N Street, NW, Room 403***

2:30 – 4:30 pm

Association of American  
Medical Colleges

**Anthony Mazzaschi**  
Associate Vice President,  
Division of Biomedical  
and Health Science  
Research

**Albert Salas**  
Assistant Vice President  
and Director, CurrMIT  
Project AAMC, Division  
of Medical Education

**Robby Reynolds**  
Director, Educational  
Resources and  
Co-Director,  
MedEdPORTAL,  
Division of  
Medical Education

**David Moore**  
Senior Associate Vice  
President, Office of  
Governmental Relations

**Morgan Passiment**  
Director, Information  
Resources Outreach and  
Liaison, Division of  
Medical School Affairs

**Brett Kirkpatrick**  
Mentor facilitator

***Return to ARL***

5:00 – 5:30 pm

Group debrief/highlights of day

**DeEtta Jones**  
Facilitators

Reception

**Lipscomb apartment**  
2127 California St. NW  
#506

## Wednesday

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

8:30 – 9:30 am	Arrival Setup for NLM sessions	Facilitators
9:30 – 10:45 am	Welcome	Sheldon Kotzin Acting for Acting Associate Director, Library Operations
	Panel: Library Operations and NN/LM	Sheldon Kotzin Chief, Bibliographic Services Division
		Angela Ruffin Head, National Network Office
		Dianne McCutcheon Chief, Technical Services Division
		Eve-Marie Lacroix Chief, Public Services Division
		Rick Forsman Mentor facilitator
10:45 – 11:00 am	Break	
11:00 am – 12:00 noon	Tour of NLM	Melanie Modlin Public Affairs Specialist, Office of Communications & Public Liaison
12:00 noon – 1:00 pm	Lunch (on own in cafeteria)	
1:00 – 1:30 pm	Research & Development	David Wheeler Head, User Services Section, Information Resources Branch National Center for Biotechnology Information

1:30 – 2:00 pm

Deborah Zarin  
Assistant Director for  
Clinical Research Projects  
Director,  
ClinicalTrials.gov  
Lister Hill National Center  
for Biomedical  
Communications

Nancy Roderer  
Mentor facilitator

2:00 – 3:00 pm

Extramural Programs

Valerie Florance  
Deputy Director,  
Extramural Programs

Carol Jenkins  
Facilitator

3:00 – 3:15 pm

Break

3:15 – 4:15 pm

Informal meeting

Betsy Humphreys  
Deputy Director

Donald Lindberg  
Director

Dinner

Roderer home  
3608 Norton Pl. NW

## Thursday

*ARL, 21 Dupont Circle, NW, Suite 800*

8:30 – 9:00 am	Continental breakfast Group debrief/highlights of NLM sessions	DeEtta Jones Facilitators
9:00 – 9:30 am	Setup for day's sessions	Facilitators
9:30 – 9:45 am	Break	
9:45 – 11:45 am	Panel: Scholarly communications	Karla Hahn Director, Office of Scholarly Communications, ARL  Rick Johnson Senior Advisor, SPARC and Alliance for Taxpayer Access  Pat Thibodeau Member, NIH Public Access Working Group Mentor facilitator
11:45 am – 1:15 pm	Lunch Institute of Museum and Library Services	Mary Chute Acting Director and Deputy Director for Libraries  Bill Garrity Mentor facilitator
1:15 – 2:15 pm	Association of Academic Health Centers	Clyde Evans Vice President and Director, American Network of Health Promoting Universities  Michael Homan Facilitator
2:15 – 3:30 pm	Role of AAHSL	Michael Homan Director of Libraries Mayo Clinic & Mayo Foundation President, AAHSL

3:30 – 3:45 pm	Break	
3:45 – 4:45 pm	Group debrief/highlights of day's sessions	DeEtta Jones Facilitators
	Evaluation of year Wrap-up	DeEtta Jones
6:30 – 8:00 pm	Reception and graduation ceremony <b><i>Jurys Washington Hotel</i></b> <b><i>Westbury Room</i></b> <b><i>1500 New Hampshire Ave. NW</i></b>	Wayne Peay DeEtta Jones Judy Burnham Brett Kirkpatrick Betsy Humphreys Michael Homan

**NLM/AAHSL Leadership Fellows Program  
2004-2005**

**Reception and Graduation Ceremony**

**Jurys Washington Hotel  
Westbury Room  
1500 New Hampshire Ave. NW**

**Thursday, November 3, 2005  
6:30 – 8:00 pm**

**PROGRAM**

Welcome and Program Background

Wayne Peay  
Co-Chair, AAHSL Future  
Leadership Task Force

Overview of Program and Year

DeEtta Jones  
Director, Organizational  
Learning Services  
Association of Research  
Libraries

What It's Meant to Be a Fellow

Judy Burnham  
Associate Director  
Biomedical Library  
University of South Alabama

What It's Meant to Be a Mentor

Brett Kirkpatrick  
Associate Vice President for  
Academic Resources and Director  
of Libraries  
University of Texas Medical  
Branch, Galveston

Recognition of Fellows and Mentors  
Presentation of Certificates

J. Michael Homan  
President, Association of  
Academic Health Sciences  
Libraries

Betsy Humphreys  
Deputy Director  
National Library of Medicine

Reception

## **Appendix E**

### **What it's meant to be a fellow**

**Judy Burnham**  
**University of South Alabama**

In life, sometimes we seek opportunities and sometimes they are thrust upon us. Dawn, Jett, Beth, Susan and I sought the opportunity to become a Fellow in the NLM/AAHSL Leadership program, but we didn't realize the many opportunities that would be made available to us to during the year.

This year has

- given us both practical and theoretical experiences
- increased our level of confidence,
- expanded our network to include the Fellows and Mentors
- given us the courage and some new skills to look boldly into the future
- given us a new way of thinking about our library and our profession, by looking at the big picture
- helped us to realize that the director should serve as a Lego, linking the library to the other entities of campus and the profession
- helped us move a step beyond management to creativity and visioning
- helped us re-examine the why, the what and the what if of what we do
- opened our eyes to different worlds and a different ways of doing things.

The site visits gave us the opportunity for total immersion into our mentor's world as a leader in health sciences libraries. While the opportunities for new experiences were welcomed, it was also comforting to realize that those sites are facing many of the same challenges that our own institutions are facing.

The mentor relationship was one we all value. All of our mentors are very well respected not only in their profession, but also across their campuses. Besides having our own mentor who got to know us personally, we also had the guidance of other mentors via the listserv, phone conferences, and face-to-face meetings at the conferences. We have had first hand exposure to how to keep the library central to the institution's mission. We thank them for their time and guidance.

The online classes helped us think in new ways, even if we did discover that there were some areas such as Fundraising where we were told "don't go there." The discussions after each class helped to further put the information gained into the health sciences library perspective.

The support provided for Fellows seemed infinite. We are appreciative that the staff and members of ARL, NLM, AAHSL and other organizations were willing and available to provide finances, support and guidance, especially DeEtta, Carol and Wayne. The agenda for the Capstone itself was a succinct immersion into the world of librarianship

and health sciences education. As one Fellow said, "It's like having a front seat to discuss the current issues of library leadership with library leaders." Carolyn has done an excellent job in setting up the program details, keeping us on track and acting as our own personal cheerleader, and we thank her.

And to pat each other on the back, the interaction with our fellow Fellows has encouraged and energized us during the year.

I would like to close with a story that will illustrate this past year. It had been raining all day and that kind of day is hard on both 1<sup>st</sup> graders and teachers. The children had way too much energy and the teacher was quite frazzled. She was really looking forward to the 3 o'clock bell. About 2:45, she looked out of the window and saw that the rain wasn't going to let up, so she started the process of matching the raincoats, hats and boots with the right children. Finally, she had all of the children ready to face the rain except for one little boy. She helped him with his raincoat and then started with the boots. The boots had no clasp or zipper so she really had a hard time getting them on the little boy. She tugged and pulled and finally got them on him. Then the little boy announced, "These are not my boots". Frustrated, the teacher again tugged and pulled and finally got the boots off of the little boy. The little boy then announced, "They are my sister's and sometimes she lets me wear them." This year we have had the opportunity to "wear the boots" not only of our mentors but through the site visits, the CE courses and the online discussions, have had the opportunity to "wear the boots" of a director. And this has given us great insight into possibilities for the future.



## NLM/AAHSL Leadership Fellows Program, 2004-5

### What it's meant to be a mentor

**Brett Kirkpatrick**  
**University of Texas Medical Branch**

I put my name forward to serve as a mentor, because throughout my career I've had superb mentors and because I believe it's important to continually give something back to the profession. Besides, Wayne told me to apply, and I always do what Wayne tells me to do.

A formal mentoring relationship for a prescribed time period quickly brings home a quite sobering realization that you've taken on an unusual personal responsibility to a colleague. There are important differences in the types of mentoring that most of us are accustomed to doing versus this more focused effort, especially given the two-week site visit periods. The structure of this program fosters an accelerated professional intimacy between mentor and fellow that each of the mentors has enjoyed immensely.

This particular mentoring experience has forced us to look at our own institutions and personal styles of leadership from an external and analytical perspective. As Pat noted, "Mentoring has meant for me taking a fresh look at what I do and how I do it, and finding a new excitement and energy in my career through the learning, discussions, and laughter with my protégée."

It has caused us to analyze and justify some of our behaviors – if perhaps only to ourselves – and has caused us to think about those values we hold most dear and want to perpetuate. Rick summed it up this way, "Participation compels us to reflect on our own career experiences, the values that underlie professional practice, and the rewards derived from working in a challenging environment." It also has provided all of us with a protected and structured environment that has allowed mentors to learn about each other's styles and approaches in ways we might not have been able or willing to pursue otherwise. It also has given mentors a unique and safe forum for sharing their own leadership insecurities and personal leadership concerns.

And perhaps most importantly, the program has underscored that we all bring unique talents and perspectives to the table, that no single approach to leadership is golden and that gifted and talented professionals such as this year's flock of fellows can quickly acquire important and useful leadership skills in a focused mentoring experience.

Jim McGee, in the weblog *Future Tense*, comments on the similarities between knowledge work and craft work and the apprenticeship model of learning that is fundamental to each ( <http://www.corante.com/futuretense/archives/authors/Jimm.php> ). He writes, "In the days of industrial productivity improvement and, later, in the days of expert systems development, the implicit and unexamined premise was that there was a right way to do a job and an expert who knew how. That made the improvement task one

of capturing and disseminating that knowledge. In the knowledge work world we inhabit today, that is certainly less true, if it even applies at all.”

“We are all improvising at some fundamental level; making it up as we go along. Instead of looking for someone with an answer to copy, we now have to participate in the invention process ourselves. Even in the most enlightened settings, this is an uncomfortable place to be in. In far too many organizations, it is a nearly impossible place to be in for anyone other than the junior-most members of the organization. Most of our training and development models get in the way. They are still based on an expert model. Even the community of practice models still have an expert bias. The new world is a more fundamental emotional shift than that. We are all novices, and we are all apprentices. Moreover, we are likely to remain so for much, if not all, of our working lives”

Speaking for the mentors, we sincerely appreciate the insight and generosity of NLM in funding the program, the thought and organization that the AAHSL committee has given to the program, the careful (almost parental) nurturing and nudging (mostly behind the scenes) of Carol Jenkins and Wayne Peay, the supremely effective organizational abilities of Carolyn Lipscomb and the professionalism and dynamism of the ARL staff as exemplified so beautifully by DeEtta Jones. The online courses were well-done, the facilitation was excellent, and the conference call fora added an important dimension to the program. As busy professionals, our time was well-respected, and I suspect that the mentors learned at least as much as the fellows. And I know we’ve all had a wonderfully good time in the process. And lastly, we must thank the Fellows who have risked and invested so much of themselves with no guarantee of rich reward. On behalf of the mentors, I thank all you for affording us this opportunity to grow and share.

November 3, 2005