

**REPORT
OF THE
AAHSL NEW DIRECTORS SYMPOSIUM
2012-2013**

The third AAHSL New Directors Symposium for recently appointed directors was held during November 2012 through May 2013. It combined in-person meetings, scheduled in conjunction with annual AAMC and MLA conferences, with videoconference sessions. Eleven new directors participated, as well as a number of experienced AAHSL directors who served as faculty.

Goal

The goal of the AAHSL New Directors Symposium was to introduce new directors to a professional community that will contribute to their success at their own institutions and as members of AAHSL. The director position has multifaceted responsibilities and interacts with a wide range of constituencies in an environment of technical, financial, and political complexity. Colleagues in AAHSL can serve as the peers often not available in the director's own institution, as well as a source for information and guidance. The symposium aimed to develop awareness of leadership roles and strategies and offer the opportunity to meet with other AAHSL directors and representatives of key organizations important to academic health sciences libraries. The participants should be able to share their perspective as new directors and to exchange information with both new and experienced AAHSL directors to improve how they deal with challenges in their responsibilities. The symposium also hoped to help to integrate new directors into AAHSL activities.

Background

This was the third time AAHSL offered a symposium for new directors. The initial symposium was a two and one-half day meeting in Washington, DC, in April 2006. Twelve new directors attended. The second symposium introduced an alternative format due to the uncertainty about institutional travel funding during the economic recession on the part of potential participants. In 2009-2010, the symposium retained face-to-face interaction through briefer meetings held in conjunction with annual conferences—making travel more feasible, combined with virtual presentation of content. Twenty new directors took part. Both symposia included experienced AAHSL directors who served as faculty, speakers from partner organizations, and a consultant to lead the keynote.

Needs assessment and planning

The Future Leadership Committee monitored the number of new director appointments after the last New Directors Symposium in 2009-2010. The goal was to have a large enough cohort, while balancing the timing to offer the symposium within a window after appointment as new director. The working group of Cynthia Robinson, Jim Shedlock, and Carolyn Lipscomb projected that the minimum size of the cohort for the symposium should be ten new directors with a maximum of twenty, in order to introduce them to a peer group and to justify expense and effort. They tentatively planned to continue the format of the previous symposium, which was highly rated

for helping to build a cohort over time and for the variety of learning experiences and longitudinal nature. New directors were polled in November 2011 to gauge interest and the most desirable schedule. Fifteen new directors responded they would be interested in participating. There was a clear preference for the option of meeting during the 2012 AAMC Annual Meeting in San Francisco and the 2013 MLA Annual Meeting in Boston with interim virtual meetings, over the option of combining meetings in San Francisco and a stand-alone symposium in Washington, DC. About half the respondents said they would need external support to attend a stand-alone meeting. They also responded to a question on the most pressing topic they would like to learn about as a new director. The committee felt the number of new directors had reached a critical size to offer the symposium again beginning in 2012 and that the poll confirmed the desirability of the extended format of in-person and virtual meetings.

Application

A call for applications was issued on the AAHSL list in late June 2012 with a deadline of August 1, with follow up to new directors who had responded to the 2011 poll. Due to a low number of applications, the deadline was extended to August 15. A poll was sent to all identified new directors who had not applied asking if they planned to, and, if not, why. The committee hoped to get sufficient response due to strong interest from some new directors, the past success of the program, and the ability to direct some applications of interim directors from the NLM/AAHSL Leadership Fellows Program to the New Directors Symposium when it would provide a more suitable experience. Eventually, a sufficient number of applications was received, although one new director left the position before the program began, one did not attend any events, one attended the keynote meeting without application but then dropped out, and one retired before completion of the program. Eleven directors participated in all or almost all components of the curriculum.

Priority was given to directors in the first three years of their first AAHSL director appointment. Persons with permanent appointments or in comparable interim or acting appointments were invited, including from full or associate AAHSL member libraries. This allowed directors from any library that met membership criteria to be included.

Persons interested in participating in the symposium were asked to submit:

(1) curriculum vitae

(2) letter of application addressing the following questions:

- What is your career path and what are your long-range professional goals?
- What is the single most important issue facing your institution?
- What is your biggest challenge as a library director?
- What is your greatest strength as a leader?
- Which of the potential symposium topics below are you most interested in having the symposium address?

Participants were asked to indicate in the letter of application which leadership topics—based on responses to the poll the previous fall—were of most interest to them as symposium sessions. The focus of the individual topics was expected to continue to evolve, as presenters developed the sessions and sought additional input from participants. The call also announced the keynote session and the inclusion of representatives from partner organizations to address their interests shared with AAHSL libraries.

1. Managing financial resources

(institutional priorities and library mission, establishing value of the library, organizational relationships and political positioning in relation to financing the library, strategies for dealing with budget cuts and limited resources, impact of differing institutional environments)

2. Developing a high-performance staff

(retooling and motivating staff, recruitment and retention, building an effective management team, managing conflict, rightsizing your staff, emerging roles, integrating staff with different professional backgrounds)

3. Understanding your environment

(assessing institutional needs and priorities, understanding influence of external factors, using strategic planning, developing and communicating library vision, building relationships, perceiving and using political structure, adjusting to changing situations)

4. Technology and the library

(role for the library as technology leader in the institution, how to get a seat at the table, impact of campus resources on library infrastructure, library as part of educational and scientific enterprise)

5. Emerging roles for libraries

(maturing of virtual libraries, integration into curriculum, participation on research and health care teams, alignment with academic computing, library as student center)

6. Life of director

(multiple roles, internal and external responsibilities, relations with administration, institutional politics, work/life integration, managing your schedule, professional development at director level)

7. Other: please specify.

Participants

The eleven new directors (see Appendix A) represented a variety of institutions in size, organization, mission, longevity, and geography, and, as directors, they possessed a range of backgrounds in length of tenure, experience in the same institution, and career paths. One held an interim appointment. At least two had led their libraries for long periods, but the institution was a newly established medical school. Almost half (five) were from associate member institutions.

One person came from a non-library background. Four had also participated as fellows in the NLM/AAHSL Leadership Fellows Program.

Faculty and presenters

Maureen Sullivan, organization development consultant and 2012-2013 ALA president, led the keynote session, as she has done for all three symposia. Experienced AAHSL directors were invited to serve as symposium faculty. They were encouraged to observe and participate in the other webinars and in-person sessions besides their own, to maximize the contact with new directors, and they did so to the extent feasible for them. Key leaders from AAHSL and partner organizations met with the new directors to discuss collaboration in and with AAHSL. Committee leadership also participated in the symposium and shared in facilitation of webinars or as presenters.

The following served as faculty and presenters for these topics:

- Maureen Sullivan: Roles, challenges and opportunities of leadership
- Carol Jenkins and Elaine Martin: Emerging roles for libraries (webinar)
- Elliott Shore: Libraries and research institutions (webinar)
- Betsy Humphreys: Collaboration between NLM and academic health sciences libraries (webinar)
- Robert Horton: Funding opportunities from IMLS (webinar)
- Anthony Mazzaschi: Collaboration between AAMC and AAHSL (webinar)
- M.J. Tooley: Value and key initiatives of AAHSL
- Cynthia Robinson: Understanding your environment
- Chris Shaffer: Ontologies and the research enterprise
- Gary Byrd: Strategies for managing financial challenges
- Barbara Epstein: Developing a high-performance staff
- Sandra Franklin and Cynthia Henderson: The life of a director

Format and curriculum

The symposium presented curriculum components in a series of in-person and virtual events over the six-month period. New directors accepted for the symposium confirmed their willingness to participate in all components and to devote the time to prepare for and take part in: (1) a ½ day keynote session on November 3, 2012, prior to the AAHSL/AAMC annual meeting in San Francisco; (2) three webinars in the February-April 2012 period; and (3) a 1 ½ day meeting on May 3-4, 2013, prior to the MLA annual meeting in Boston (see Appendix B).

In the second symposium in 2009-2010, the location of the MLA annual meeting in Washington, DC, allowed speakers from partner organizations to meet with the group in person. Due to the meeting site in 2013, these speakers were incorporated into the webinars, and the in-person meeting at MLA focused on topics facilitated by AAHSL faculty.

The scheduling of events at the AAMC and MLA meetings needed to be compatible with Leadership Fellows Program events at similar times, as well as other conference obligations and

interests on the part of participants. For the 2012 AAMC meeting, the committee arrived at a compromise with other AAHSL groups and found a three-hour period early Saturday morning that met new AAMC scheduling requirements and did not conflict with other AAHSL programming.

To tailor the keynote to participant needs and interests, Sullivan reviewed applications and asked new directors to respond to brief questions. She set the stage for the symposium by leading a discussion on leadership. Participants shared their perspective on the roles played by directors and the characteristics and competencies required to be successful, and Sullivan placed the discussion in the context of leadership theory. The AAHSL president (Gary Freiburger) greeted the group on behalf of the association.

The sessions with experienced AAHSL directors were designed to help new directors think about and share experiences with setting goals and priorities, establishing programs, getting involved as the director, why to do something, and risks and challenges. The sessions were about two hours in length with ample time devoted to discussing individual issues and solutions. The input on potential topics from the applications helped to shape the content. One session was scheduled as a webinar to maximize discussion between in-person meetings, and the others were held at the MLA meeting. Topics covered were emerging library roles (including one on the potential for institutional research roles), environment, financial management, staffing, and the director life.

Representatives from ARL, NLM, IMLS, and AAMC met with the group in one hour-long webinars to share information about their organizations and discuss common interests. The AAHSL president (Tooley) joined the group at the MLA meeting to highlight the value of the association to the new directors. Personal relationships initiated in San Francisco were enhanced by meeting together again over the course of the Boston meeting.

New directors were asked to work on advance assignments or to share information. For one of the webinars, new directors were divided into small groups, with a lead person, to write and present scenarios addressing new arenas for action important to academic medical centers and what emerging roles for libraries they call for. To enhance in-person sessions, new directors were asked to describe staffing challenges and to provide information on personal work patterns and photographs of work areas, among other assignments.

The committee considered potential overlap in content between the Leadership Fellows Program and the New Directors Symposium. Some former fellows participated in the symposium, while some chose not to or were unable to for other reasons. Topics covered in the symposium are also addressed in the curriculum of the Leadership Fellows Program through the journal clubs, site visits, and mentor relationship since they are core areas of library leadership, but they are handled in different ways in each program. The partner organizations also meet with the fellows at the Capstone and may cover some of the same information. However, perhaps most importantly, the programs have different designs, and participants in the symposium are now directors and thinking about and sharing those experiences from a new perspective.

Adobe Acrobat Connect Professional was used for the webinars. NN/LM staff from the Middle Atlantic and Southeastern/Atlantic Regions assisted with technical support for the presenters and

the webinars. A list for new directors and faculty accommodated announcements and the sharing of information throughout the symposium. In an effort to continue communication after the conclusion of the symposium, one of the participants established a LinkedIn group for alumni.

Budget

There was no registration fee, but new directors and their institutions were responsible for travel costs for the meetings held in conjunction with conferences and for participation time. Experienced AAHSL directors donated their time as faculty. AAHSL supported all other costs of the symposium, including program management, headquarters overhead, consultant fee and expenses, and meeting expenses. Expenses were under budget for both 2012 and 2013 (see Appendix C). Total expenses were \$9,164, not including management costs. Management costs were not itemized in the budget, although the balance remaining in the 2013 budget covered the additional hours required by the program manager to oversee the symposium.

Evaluation

The assessment of the symposium by the new directors was positive (see Appendix D). The highest ranked outcome was the benefit of meeting and networking with other library directors, followed by a stronger connection to the AAHSL community of directors. The individual sessions were rated between 4.3 and 5.5 out of 6.0. The format of the symposium received a high score, with the exchange of information about dealing with challenges rated the highest. Common themes in the comments section included an appreciation for the universal nature of challenges and the value of networking, with more confidence and less isolation resulting from participation. Suggestions for future organization of the curriculum were received.

Future considerations

The AAHSL New Directors Symposium is valued by participants and is worthwhile to continue to be offered. Experience has demonstrated that different formats can be successful, but the advantages and disadvantages must be weighed. As AAHSL increases its educational offerings, the relationship among them and the relevance to new directors should be considered. The size and composition of the new directors cohort is critical to the experience, and it is important to recruit a strong group. The timing of the symposia will continue to be essential, so that the cohort will share the perspective of being a new director and receive maximum benefit from the curriculum.

Submitted by:

Carolyn Lipscomb
for the Future Leadership Committee

November 26, 2013

*not in this version

Attachments:

Appendix A: Participants

Appendix B: Agenda

*Appendix C: Budget

*Appendix D: Evaluation

APPENDIX A
2012/2013 AAHSL NEW DIRECTORS SYMPOSIUM PARTICIPANTS

New Directors

Tania Bardyn

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Maureen Sullivan

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Carolyn Lipscomb

Program Manager, AAHSL Future Leadership Committee
rev 6/28/13

APPENDIX B
AAHSL NEW DIRECTORS SYMPOSIUM 2012-2013
AGENDA
rev 4/24/13

Saturday, November 3, 2012

7:00 – 11:00 am

Marriott Marquis—Sierra J, San Francisco

Keynote session: Roles, challenges and opportunities
of leadership

Maureen Sullivan

Tuesday, February 12, 2013

2:00 – 4:00 pm ET

Webinar and discussion

Emerging roles for libraries

Carol Jenkins
Elaine Martin

Tuesday, March 5, 2013

2:00 – 3:00 pm ET

Web presentation and discussion

Libraries and research institutions

Elliott Shore, PhD
Executive Director
Association of Research Libraries

3:00 – 4:00 pm ET

Web presentation and discussion

Collaboration between NLM and
academic health sciences libraries

Betsy Humphreys
Deputy Director
National Library of Medicine

Tuesday, April 9, 2013

2:00 – 3:00 pm ET

Web presentation and discussion

Funding opportunities from IMLS

Robert (Bob) Horton
Associate Deputy Director
Office of Library Services
Institute of Museum and
Library Services

3:00 – 4:00 pm ET

Web presentation and discussion

Collaboration between AAMC and
AAHSL

Anthony (Tony) Mazzaschi
Senior Director, Scientific Affairs
Association of American Medical
Colleges

Friday, May 3, 2013

Sheraton Boston Hotel—Clarendon

8:00 – 9:00 am

Breakfast and reconnecting

9:00 – 10:00 am

Value and key initiatives of AAHSL

M.J. Tooley

10:00 – 10:15 am

Break

10:15 am – 12:00 noon

Understanding your environment

Cynthia Robinson

12:00 – 1:00 pm

Lunch

Ontologies and the research enterprise

Chris Shaffer

1:00 – 2:00 pm

Strategies for managing financial challenges

Gary Byrd

2:00 – 2:15 pm

Break

2:15 – 3:15 pm

Strategies for managing financial challenges

Gary Byrd

3:15 – 3:45 pm

Group debrief/highlights of day

Saturday, May 4, 2013

Sheraton Boston Hotel—Gardner A

7:30 – 9:45 am

Breakfast

Developing a high-performance staff

Barbara Epstein

9:45 – 10:00 am

Break

10:00 – 11:45 am

The life of a director

Sandra Franklin
Cynthia Henderson

11:45 am – 12:15 pm

Symposium wrap-up