

# NLM/AAHSL Leadership Fellows Program

## 2013-2014 Report

(note: appendices are not included in this version)

### Highlights

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

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

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

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

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

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

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

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

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

### **2013-2014 Class: Year in Review**

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

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

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

- **Orientation and AAMC meeting:** The orientation (**Appendix D**) for the 2013-2014 class introduced cohort members to one another and reviewed expectations for the program. The group completed leadership assessments (Myers-Briggs Type Indicator Form M and FIRO-B) in advance, so that results could be shared with individuals and used as the basis for a discussion of intentional leadership. Deiss met with each fellow before the meeting by telephone to debrief them on their leadership reports and to enhance their use as developmental opportunities to pursue during the program experience. The fellows and mentors were encouraged to use the profiles in setting goals as they worked on learning plans for the year. The orientation also included a discussion on how to get the most from a mentoring relationship. Time was built into the day for mentors and fellows to have one-on-one conversation and to begin to plan their work together. The group participated in an exercise on futures thinking for academic health sciences libraries. The AAHSL Board of Directors joined the class for lunch, where guidance on benefiting from attendance at the AAMC conference was shared, and Dianne Babski greeted the cohort on behalf of NLM.
- **Learning plans:** The individual fellow learning plans (**Appendix E**) are an important tool in shaping the year. In collaboration with their mentors, fellows describe three goals and outline their importance, necessary resources, and definition of success. The plans help determine the focus of the site visits and how other program components can further achievement of the goals. A fourth goal related to the leadership report is also included. Fellows share their plans with the cohort at the beginning of the year, and it is expected that plans can be modified during the course of the fellowship.
- **Virtual learning:** The Web-based curriculum (included in the schedule in **Appendix C**) allows for expanded content and connections between in-person meetings. Topics presented were: power and influence, workforce issues, enhanced library roles, managerial finance, strategic planning, diversity and inclusion, and crisis management. Mentors, along with Deiss and Jones, assumed responsibility for developing and presenting the sessions and facilitating discussion. Fellows were asked to prepare through advance assignments with the goal of preparing them to think strategically at a director level. Adobe Acrobat Connect Professional is used for the teleconferences, made available by the NN/LM, with technical assistance provided by the New England Region.
- **Leadership Institute:** The half-day Institute program on May 17 (**Appendix F**) focused on practical career guidance for fellows as they prepare for director positions. A mock interview exercise was included. Fellows were paired with a mentor other than their own and were asked to prepare to interview for the director's position, with the mentor acting as the medical school dean or other appropriate administrator. Fellows also shared their

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

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

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

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

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

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

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

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

### All Classes

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

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

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

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

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

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

### **Goals**

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

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

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