

**NLM/AAHSL Leadership Fellows Program**

**2018-2019  
Report**

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## HIGHLIGHTS

The AAHSL Future Leadership Committee (FLC) continues to actively promote the recruitment and development of first-class leaders in academic health sciences libraries, through activities in the areas of recruitment, education/training/mentoring, and research. Committee members worked on revising the fellows' application process and provided guidance as new structural changes were implemented for the Leadership Fellows Program over the year.

Patricia Thibodeau continued as program director for the 2018/2019 program, working with the FLC leaders and committee members and faculty Kathryn Deiss on the new changes to the curriculum.

During the year the chairs met monthly with the program director and, as needed, with committee members using GlobalMeet conferencing, in order to oversee and coordinate committee work. A subcommittee of the FLC reviewed the application and selection processes for 2019/2020 and selected fellows and mentors for the 18<sup>th</sup> class that began in November 2019. The choices for fellows and mentors were subsequently approved by the AAHSL Board and NLM.

The Leadership Fellows Program (LFP) has completed 17 years. Its long-term success is the result of the support from its sponsors—NLM and AAHSL—and the contributions of fellows, mentors, and committee and AAHSL members. Former fellows Amy Allison (Geisinger Commonwealth School of Medicine) and Nancy Allee (University of Michigan) were appointed to permanent director positions. In addition, Mellanye Lackey, a 2018/2019 fellow, became director at the University of Nevada Las Vegas during the program year. With these three new directors, 54% of Fellows have been named permanent directors since the program began.

The program submitted a new contract for continued NLM funding under a noncompetitive award that partially funds the Leadership Fellows Program. The statement of work for the new contract reflects the changing nature of the program and the new structure but also provides flexibility for the future. The award has the option of four succeeding years. AAHSL and Leadership Fellows Program remain very grateful for NLM's continued support and participation in the program.

### **Program Director**

Patricia Thibodeau completed her second year as Program Director with 2018/2019 class. In this role she worked under the overall guidance of the committee chairs and was responsible for management of the Leadership Fellows Program (LFP) as well as management of all other committee responsibilities, serving as liaison with the full committee, and coordinating curricular activities and venue plans with the AAHSL Office. The Office continued to manage meeting logistics and expenditures for fellows and other committee activities. The committee used Basecamp to coordinate the program's activities including ensuring regular communications and fostering the fellow/mentor community. Basecamp also supports the FLCs activities including the selection process for new fellows. NLM provided access to its WebEx platform for the virtual interactive learning sessions with technical support provided by Region 2 NNLM staff members.

## Assessment

An important metric for evaluation of the program is the transition of fellows to director positions. As of December 2019, 54% (47) of the Fellows have received permanent director appointments. In 2019 three (3) former fellows assumed permanent director positions. One of the appointees was a fellow in the 2018/2019 cohort. (**Appendix A**)

A roster of director vacancies is maintained to augment vacancy postings on the AAHSL Web site. As of December 2019, there are 15 institutions with known vacancies in directors' positions. These include those actively recruiting, those with interim directors. In addition, two new schools are seeking LCME accreditation and are in the early stages of implementing their programs. Another 10 institutions filled their director positions over the past year for a total of 24 vacancies during 2019. As cited in the last report, the 2018 Director Workforce Trends study revealed that there will be an ongoing number of retirements among HSL directors. AAHSL anticipates 30 to 70 more vacancies in directors' position over the next 5 to 15 years, with many deputy and associate directors retiring as well.

With the selection of the incoming 2019/2020 class, 92 fellows and 74 different mentors will have participated in the program. Seventeen mentors will have served in this role two or more times and twelve former fellows, now directors, will have also served as mentors. Well over 60% (n=100) of all AAHSL member institutions (n=182 members) have had at least one mentor or fellow on staff or have hired a fellow.

As noted in the October 2019 report, over the past ten years 23.5% of the fellow applicants have indicated a minority status since voluntary self-identification of ethnic or racial status was initiated. Unfortunately, no applicants self-identified a racial or ethnic background; 19 of the 20 candidates self-identified as Caucasian and one declined to provide any designation. The lack of diversity in the applicant pool is of great concern to AAHSL and the Leadership Fellows Program. The Future Leadership Committee has begun discussions to identify better approaches for creating a diverse applicant pool. The Committee has met with staff at NLM, talked to experts in leadership training and library diversity, and had a lengthy discussion with AAHSL's Committee on Diversity, Equity and Inclusion as well as taking the issue to the AAHSL Board. After reviewing the data on diversity within health sciences libraries, the Committee realizes this is a broader pipeline issue for the profession. However, several potential solutions have been identified and will be implemented for the 2020/2021 application process.

The Future Leadership Committee continues to monitor participant satisfaction with the program's activities throughout the year and implements changes as a result of annual evaluations. A separate evaluation of the Orientation continued to be conducted this year to provide more immediate feedback from the fellows and mentors and identify potential topics for later in the year. An in-depth evaluation was conducted for the Leadership Institute because it was expanded to three days. In addition to an evaluation questionnaire, debriefing sessions were held for mentors and FLC chairs with Kathryn Deiss to identify areas that worked well and how the Institute could be improved. Based on the evaluation and feedback the 3-day Institute was highly rated, and participants thought the expanded time provided more time for delving into content and sharing experiences. The evaluation results for the Institute (**Appendix J**) have been added to this report because the multi-day approach was a major change and is a significant component of the program.

The final program evaluation is conducted at the end of each class and provides feedback for making improvements and adjustments for the new class year. (**Appendix K**) In addition to detailed feedback about the Capstone event, fellows and mentors are asked to reflect on all the program components and the overall success of the program. According to the evaluation results, the program successfully met all its objectives and the various curriculum components provided rich content and experiences.

An important tool in the program is the Learning Plan that is completed by the fellow with guidance from the mentor. This year the Future Leadership Committee asked mentors and fellows from the prior five classes to assess the relevance and usefulness of the Learning Plan. The survey results reinforced the value of the plan for setting goals for the fellow and providing a framework for the site visits and discussions. There were recommendations that it provide more flexibility in terms of the number of the goals and that reminders should be sent to fellows and mentors to review the document throughout the year. Additional comments have been included in the revised instructions – reminding the cohort that goals can change over the course of the year and providing more background about the program’s objectives. The revised learning plan will be used for the 2019/2020 cohort.

The accomplishments for the 2018/2019 Leadership Fellows Program are described below.

### **2018/2019 Class: Year in Review**

The seventeenth class completed its year on September 13, 2019 (**Appendix B**). Fellows (Blair Anton, Amy Blevins, Mellanye Lackey, Katherine Prentice, and G. Randall Watts) and mentors (Melissa De Santis, Terrie Wheeler, Chris Shaffer, Ellen Nordre Sayed, and MJ Tooley) worked together in fellow/mentor pairs.

The Leadership Fellow Program scheduled curricular activities and events throughout the year from the initial Orientation and mid-year Institute to the final Capstone and Graduation ceremony (**Appendix C**). An orientation session was also provided for mentors (**Appendix D**) at the AAHSL and AAMC annual meetings. Fellows communicated with each other and with their mentors on a regular basis throughout the year. All fellows experienced a one-week site visits at their mentors’ home libraries, with visits focusing on their learning goals. Fellows were able to meet a range of library staff and university officials, participate in and observe library and university meetings and decision making, attend events, visit other area libraries, and gain a sense of their mentors’ leadership styles. They also shared their own perspectives with their mentors’ staff. As in the past, site visit reports revealed that they had rich experiences with opportunities to observe a different leadership style, culture and environment and meet with key institutional leaders. This comment summarizes the central theme in those reports:

“This visit...was an invaluable, meaningful learning experience...It was a privilege to meet external key leaders and champions of the library, all of whom uniformly see the library as a vibrant, engaged partner, and sharing the mission of the institution in all its academic pursuits to advance research, clinical practice and teaching.”

## **Orientation**

At its Orientation meeting on November 1, 2018, in Austin, TX, (**Appendix E**), the cohort met with committee faculty and consultant Kathryn Deiss (**Appendix I**). They discussed topics including intentional leadership, crafting a personal vision, and the mentoring relationship. Deiss, who has served as faculty to the program since its second year, administered two leadership questionnaires prior to the orientation meeting. She debriefed each fellow (and mentor when requested) on the tools' results prior to the orientation and provided a group debrief at the Orientation.

The Orientation session continued to focus on boundary spanning skills and approaches, and on the NEXUS Lab Layers of Leadership that is linked to the fellows' learning plans. Before the Orientation, fellows were asked to complete a self-assessment of leadership competencies using questions from Layers of Leadership D (multiple departments) and E (institution). Progress and growth in these competencies areas was assessed again through a self-assessment at the end of the year. All areas but one showed increased confidence in their leadership competencies from the beginning to the end of the year. The one area that remained the same was providing effective feedback to staff, but the scores still demonstrated a strong confidence in those skills. Tips for a successful mentoring relationship were also presented at the Orientation as well as in the mentors' orientation session.

## **Learning Plans**

The individual fellow learning plans (**Appendix F**) are an important tool in shaping the year. In collaboration with their mentors, fellows describe three goals and outline their importance, necessary resources, and definition of success. The plans also identified the competencies or skills being addressed using the Nexus Layers of Leadership. The learning plans help determine the focus of the site visits and how other program components can further achievement of their goals. Fellows share their plans with the cohort at the beginning of the year, and it is expected that plans will be modified during the year as needed. Fellows and mentors report using the plan during monthly discussions and when planning the site visit.

## **Virtual learning**

Building on the orientation and learning plans, the group met on a monthly basis in 2018/2019 through virtual interactive sessions using a webinar platform (included in the curriculum timeline in **Appendix C**). Mentors and their fellows developed virtual presentations and facilitated the discussion for the sessions. Topics covered were: Situational Leadership (Amy Blevins, Terrie Wheeler); Strategic Resource Allocation (Randall Watts, MJ Tooley); Effective Presentations (Katie Prentice, Ellen Sayed); Development Work (Mellanye Lackey, Chris Shaffer); and Organizational Structure (Blair Anton, Melissa De Santis). A special topic was recommended at the Leadership Institute and Terrie Wheeler facilitated a session on Kouzes' and Posner's leadership challenges. Faculty member Kathryn Deiss conducted a session on emotional intelligence as well. The fellows were very active in developing each session including assigning readings and activities to be completed before each webinar and identifying learning approaches that would ensure active participation by all the fellows. Mentors contributed their own experiences and perspectives to these discussions.

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

### **Leadership Institute**

The new three-day Leadership Institute was held on May 1 through May 4 and facilitated by Kathryn Deiss. It focused on developing leadership skills and practical career guidance for fellows as they prepare for director positions. The Institute started with a group dinner on May 1 to reconnect the group. The next three days presented various leadership topics and models including communication, power and influence, organizational culture, change, diversity, and presenting oneself as a leader. Mark Puente from ARL was invited to discuss the leader's role in building and maintaining diversity in health sciences libraries. The mock interview followed the format used in prior years and used a standardized set of interview questions and a feedback form. Mentors shared their experiences in interviewing and negotiating for a director's position, as well as beginning the role of a new director. A second group dinner was held to provide more social time for the group. **(Appendix G)**

### **Capstone**

The 2018/2019 class met for the final time at the Capstone in Washington, DC, September 12 through 13, 2019 **(Appendix H)**. This year the Capstone was shortened to two-full days. The Capstone sessions introduced fellows to the major national associations and organizations involved in the health sciences, and the policies, priorities and initiatives that have an impact on academic health centers and health sciences libraries. Representatives from NLM, NIH, AAMC, SPARC, ARL, and AAHSL met with the group. The presentations covered national trends and challenges in the library and health sciences environment as well providing information on the services and activities their associations support. A highlight was the opportunity for fellows to hear about the major structural changes within in NLM that will ensure operations are aligned with its new strategic plan. The fellows were also able to talk to Dr. Patricia Flatley Brennan, NLM Director and Jerry Sheehan, Deputy Director. The various presentations underscored the need for directors to be aware of and monitor developments on a national as well as local level.

A reception and graduation ceremony on the final evening of the Capstone recognized the achievement of the fellows and mentors and was attended by meeting participants, speakers and local library leaders from the area. There were about 30 attendees.

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

### **Goals FY19-20**

The Future Leadership Committee will continue to: maintain the strength and diversity of the candidate pools and the cohort; implement improvements based on evaluations; enhance the program content and design, focusing on improving the effectiveness of virtual sessions and face

to face time; facilitate cohort cohesion; and assess the components of leadership development within AAHSL. Based on feedback from the evaluations, the Leadership Institute content will be slightly revised to ensure strong and cohesive leadership content. The 2020 three-day Leadership Institute will be held in Chicago, April 1 through April 4; it will no longer be held in conjunction with the MLA annual meeting. The Capstone event will continue to be held for two days and one site visit be scheduled to the mentor's institution. The FLC will continue to evaluate the effectiveness of these changes implemented in 2018/2019. The FLC will work with the AAHSL Board for addressing the needs of new or interim directors. Committee members will work on revisions to the 2020/2021 fellows' application information and will evaluate the effectiveness of the current brochure on recruiting a health sciences library director.