

**FINAL REPORT
OF THE
AAHSL NEW DIRECTORS SYMPOSIUM
2009-2010**

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.

Planning background

The Future Leadership Committee began planning in 2007 for the second offering of the AAHSL New Directors Symposium, in light of the projected number of new directors since the initial symposium in April 2006. A proposal was made to the National Library of Medicine to sponsor the symposium, but the committee subsequently decided to pursue other funding arrangements. A working group of David Ginn and Cynthia Henderson made recommendations on structure, schedule, and participants and developed a budget. An inquiry of interest sent to the AAHSL list in October provided a current count of potential participants; based on this information, the committee proposed delaying the symposium until March 2009 to increase the pool of participants. The Board of Directors concurred and reserved the approved budget until 2009 with the allotment of a small amount if needed for planning (the planning funds were subsequently carried over to 2009).

In 2008 a new working group of Barbara Epstein, Cynthia Henderson, and Carolyn Lipscomb continued planning. Both Epstein and Henderson provided perspective as new director participants in the first symposium. AAHSL records indicated about 28 new permanent director appointments since 2006. In a December survey, many new directors indicated interest in a symposium, but most faced inability or uncertainty about traveling for a 2 ½ day event in Washington, DC, in March 2009 due to the economic conditions. In response, the committee made a proposal to the Board of an alternative format to maximize the ability of directors to participate. The Board approved the proposal and splitting the budget between 2009 and 2010. New directors who had responded to the

previous call for interest were re-surveyed and most expressed enthusiasm for the changes.

Symposium format

As the goal of the symposium was to build a community of directors, the new format (see Appendix A for the final agenda) retained face-to-face interaction, while also taking advantage of virtual presentation of content. It broke program components into a series of events over a six-month period and combined virtual meetings with briefer in-person meetings held in conjunction with AAHSL and MLA annual meetings. As new directors were expected to pay their own travel costs, building on the conferences was likely to make attendance more feasible.

New directors accepted for the symposium agreed to participate in all components: (1) a ½ day keynote session on November 7, 2009, prior to the AAHSL/AAMC annual meeting in Boston; (2) two webinars during the January-March 2010 period; and (3) a 1 ½ day meeting on May 21-22, 2010, prior to the MLA annual meeting in Washington, DC.

Application

A call for applications was finally issued on June 2, 2009, with a deadline of July 2 (extended to July 13, due to AAHSL list problems). In addition to messages on the list and MLANET, the program manager or executive director contacted individually new directors who did not apply or who were newly appointed. Priority was to be given to AAHSL directors in the first three years of their first permanent director appointment. Persons in interim or acting director positions were welcome to apply, with acceptance subject to the availability of space. New directors appointed after the deadline but before the beginning of the symposium would be considered if possible. The Board clarified the membership status of new institutions and authorized including library directors in institutions with anticipated associate AAHSL membership. The planning committee projected a cohort size of a minimum of 10 to a maximum of 20.

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 of the following topics were of most interest to them as symposium sessions by ranking them. The focus of the individual topics was expected to evolve, as presenters developed the sessions and sought additional input from participants.

1. Managing financial resources
(institutional priorities and library mission, legal and fiscal responsibilities, strategies for dealing with budget cuts, conflict of interest issues)
2. Developing a high-performance staff
(building a management team, managing conflict, rightsizing your staff, integrating staff with different professional backgrounds, cross-generational communication)
3. Library space in the 21st century
(trends in reconfiguration and repurposing, gaining institutional/staff support for change, planning and managing renovation projects)
4. Technology and the library
(role for library as technology leader in institution, how to get seat at table, impact of campus resources on library infrastructure, library as part of educational and scientific enterprise)
5. Future roles for libraries
(virtual libraries, integration in curriculum, participation on research and health care teams)
6. Life of director
(roles, internal and external responsibility, relations with administration, institutional politics, work/life integration, professional development at director level)
7. Other: please specify.

Participants

Eighteen new directors applied and were accepted and confirmed; two additional directors were admitted before the start of the symposium (see Appendix B for the roster). They 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. They had held their positions of director from two months to three years at the start of the symposium. Three had interim appointments; a fourth moved from interim to permanent after acceptance. Due to the format of the symposium, the employment status of two participants changed over the course of the event, and the committee welcomed them to complete the symposium. Former fellows in the NLM/AAHSL Leadership Fellows Program were accepted, and 7 of 20 new directors participated in both programs; the planning committee tried to minimize overlap of the experiences.

Faculty and presenters

Maureen Sullivan, organization development consultant, led the keynote session on roles, challenges, and opportunities of leadership to kick off the symposium. 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 possible.

The planning committee met with Sullivan by telephone to discuss the keynote. The entire faculty and Sullivan met for a planning lunch in Boston scheduled between the keynote and the AAHSL educational seminar.

The following faculty facilitated sessions on these topics:

- Carol Jenkins and Elaine Martin: Future roles for libraries (webinar)
- Brett Kirkpatrick and Lynn Kasner Morgan: Technology and the library (webinar)
- Barbara Epstein: Developing a high-performance staff (in-person)
- Sandra Franklin and Cynthia Henderson: The life of a director (in-person)

The final in-person meeting also included presentations on collaboration in and with AAHSL from key leaders at AAHSL and partner organizations:

- Betsy Humphreys: NLM
- Tony Mazzaschi and Morgan Passiment: AAMC
- Joyce Ray: IMLS
- Charles B. Lowry: ARL
- Connie Poole: AAHSL

Curriculum

To tailor the keynote to participant needs and interests, Sullivan reviewed the applications and asked new directors to respond to brief questions. The keynote in November 2009 featured a lively discussion of the expanse of director roles and leadership. Sullivan capitalized on the direction of the conversation and maximized participation. Most Board of Directors members were present for breakfast, expanding interaction for the new directors.

The faculty sessions were designed to help new directors think about and share experiences with concepts such as getting programs started or becoming involved as the director, why to do something, risks, and challenges. The sessions were two hours in length, with about half the time devoted to sharing of issues and solutions by the new directors. The ranking of topics on the applications helped to shape the content. The subjects of most interest were: developing a high-performance staff, technology and the library, future roles for libraries, and life of a director. Managing financial resources was incorporated into all the topics where appropriate.

In order to make the webinars as participative as the in-person meetings, the new directors were divided into five small groups—each with a lead person—and asked to work on advance assignments together. For the webinar on future library roles, the small groups wrote scenarios for roles and needed capacity; the groups chose to focus scenarios on curriculum redesign, alignment with academic computing, mobile computing, library as student center, and expanded research roles. The scenarios were presented during the webinar, and the group discussed common themes, success factors, and how the director supports and determines priorities among potential roles. For the webinar on technology, a similar pattern was followed. New directors posed questions or issues they hoped to address; the faculty identified five broad topics and asked the small groups to consider issues and strategies using the topical guides of leadership and collaboration opportunities and governance and resource implications. The topics dealt with campus IT, research and patient care, information-anytime-anywhere, curricula, and data.

Adobe Acrobat Connect Professional was used for the webinars; Marco Tamase of the UCLA NN/LM staff provided technical support. A wiki was established as a centralized location for curriculum material. A list accommodated announcements and discussion between sessions.

The topics selected as most suitable for in-person presentation at the final meeting also utilized advance input from the new directors. They provided descriptions of the most difficult staffing challenges, which the faculty presenter clustered into staff resistance to change, staff conflict, recruitment/retention/turnover, and building a management team. The faculty for the life of a director surveyed new directors and faculty on their work habits and patterns and solicited photographs of their work areas. The resulting sessions were engaging for participants and provided practical advice.

Outside presenters from other Washington-area organizations were also a part of the final meeting. Representatives from NLM, AAMC, IMLS, and ARL discussed collaboration and potential opportunities with AAHSL and met with new directors during informal breaks. Connie Poole spent the last morning of the symposium with the group and highlighted the value of AAHSL for directors.

This final meeting in May 2010 capitalized on the groundwork laid at the keynote and throughout the virtual portion of the symposium, and personal relationships were extended. Opportunities for social interaction were incorporated, including a group dinner the night before the meeting; Sullivan was able to attend the dinner and reconnect with the cohort.

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. Faculty donated their time. AAHSL supported all other costs of the symposium, including program management, consultant fee and expenses, and facility catering and audiovisuals. The total expenses were \$22,177, just under budget. (See Appendix C.)

Evaluation

The assessment of the symposium by the new directors was very positive. (See Appendix D.) The highest ranked outcome was the benefit of meeting and networking with other library directors. The individual sessions were all highly rated. Although the format was designed to overcome problems presented by the recession and budgets, it was praised by the majority of participants. Participants were energized about participating more in AAHSL in the future. They cited a number of practical actions as takeaways they planned to incorporate in their professional lives. The symposium achieved its intention of demonstrating the value of AAHSL and its commitment to helping new directors succeed.

Submitted by:

Judy Consales, Co-Chair
Elaine Martin, Co-Chair
Lynn Kasner Morgan, Co-Chair Designate
Barbara Epstein, Planning Committee
Cynthia Henderson, Planning Committee
Carolyn Lipscomb, Program Manager

Future Leadership Committee

September 6, 2010

Attachments:

Appendix A Agenda

Appendix B Participants

Appendix C Expenses [not included in this version]

Appendix D Evaluation Summary [not included in this version]

**APPENDIX A
ASSOCIATION OF ACADEMIC HEALTH SCIENCES LIBRARIES
NEW DIRECTORS SYMPOSIUM
2009-2010**

AGENDA

Saturday, November 7, 2009

Keynote Session

*Hynes Convention Center – Room 300
Boston, MA*

8:00 am – 12:00 noon

**Roles, challenges and
opportunities of leadership**

Maureen Sullivan
Organization
Development
Consultant

Tuesday, January 26, 2010

Webinar and discussion

2:00 – 4:00 pm ET
1:00 – 3:00 pm CT
12:00 – 2:00 pm MT
11:00 am – 1:00 pm PT

Future roles for libraries

Carol G. Jenkins
University of North
Carolina at Chapel Hill

Elaine R. Martin
University of
Massachusetts Medical
Center

Monday, March 22, 2010

Webinar and discussion

2:30 – 4:30 pm ET
1:30 – 3:30 pm CT
12:30 – 2:30 pm MT
11:30 – 1:30 pm PT

Technology and the library Brett Kirkpatrick
University of Texas
Medical Branch, Galveston

Lynn Kasner Morgan
Mount Sinai Medical Center

2:45 – 4:45 pm	Developing a high-performance staff	Barbara Epstein University of Pittsburgh
4:45 – 5:00 pm	Group debrief/highlights of day	Carolyn Lipscomb Lynn Kasner Morgan

Saturday, May 22, 2010

Hilton Washington – Jefferson West

8:00 – 9:00 am	Continental breakfast Value and key initiatives of AAHSL	Connie Poole Southern Illinois University President, AAHSL
9:00 – 11:15 am	The life of a director <i>(break 10:15-10:30)</i>	Sandra Franklin Emory University Cynthia Henderson Howard University
11:15 am – 12:00 noon	Open session Symposium wrap-up	Faculty and participants Lynn Kasner Morgan Carolyn Lipscomb

5/6/10 rev

APPENDIX B
AAHSL NEW DIRECTORS SYMPOSIUM
2009 – 2010

Participants

New Directors

Ellis B. Beteck
Former Interim Director, Louis Stokes Health Sciences Library
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