

NLM/AAHSL Leadership Fellows Program

2010-2011 Report

Highlights

Note: Appendices are not included with this version of the document.

The NLM/AAHSL Leadership Fellows Program will celebrate its tenth anniversary in 2011-2012. Thanks to the strong support of the sponsors, the National Library of Medicine and the Association of Academic Health Sciences Libraries, and 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. It is building on its recognition in the library field—and more broadly—as a successful model of leadership development.

An important metric for evaluation of the program is the transition of fellows to director positions. To date, 19 of 45 fellow graduates have received director appointments. During 2011, Keith Cogdill (National Institutes of Health), Tania Bardyn (University of Washington), and Laura Cousineau (Dartmouth College) were added to this list. Two of these fellows were appointed before the conclusion of their fellowship year, as recruiters draw on the program as a source of candidates. Overall, 27 former fellows (60%) have been promoted to director or other positions of higher responsibility (**Appendix A**).

The number of fellow applicants has remained steady for the last three years at around 17. The annual average over the course of the program has been just under 23. In the last six years (since voluntary self-identification of ethnic or racial status was initiated), 27% of selected fellows have indicated minority status. Next year's cohort also includes the first fellow from a Canadian institution. Three of the fellows in the new class work for directors who are former fellows, an indication of the maturing of the program.

As noted in the report in September, questions on the length and appropriate type of management experience of applicants arose during the selection process, and the committee is reevaluating how to interpret and present the requirement in the future. The process should accommodate evolving library organizational structures, nontraditional domain knowledge, and changing pathways to director positions, while measuring readiness to take the next step to be a director candidate.

The selection committee considered increasing the cohort size for 2011-2012 from five to six fellows, depending on the candidate pool, and got advance approval from the AAHSL Board of Directors and consulted with NLM and program faculty. In the end, the committee determined that five candidates were clearly the most qualified and that there was a dividing line between them and the rest of the pool. The board has approved funding for a potential sixth fellow again for the 2012-2013 cohort.

A roster of director vacancies is maintained, to augment the 2007 survey on projected vacancies showing that one-third of current directors intended to retire by 2011 and another third between 2012 and 2016. In 2011, up to 12 existing institutions at a time were recruiting or had vacant positions or interim appointments; another 3 associate AAHSL members had vacancies. Eight new medical schools in the LCME approval process did not yet have director appointments. These statistics show an ongoing need for the program, while the trend of new schools influences future planning.

The committee and program faculty reassessed the curriculum and made modifications to strengthen the support for fellows in leadership at the director level. The virtual sessions encouraged fellows to think strategically about topics and to analyze themselves and their organizations. Fellows also had the opportunity to observe leadership strategies during the site visits. Program coordinators emphasized connections between curriculum components, including integrating the results of the self-assessment instruments throughout the year. The Leadership Institute at the MLA Annual Meeting focused for the first time on analysis of organizational culture and climate. As libraries continue to operate in a challenging economic climate with resulting organizational changes, the program is able to adapt and give fellows perspective on responses to the environment.

With the incoming 2011-2012 class, 50 fellows and 42 different mentors will have taken part in the program. About half of AAHSL institutions (52% of full members) have had either a mentor or fellow on staff or have hired a fellow, with many participating in more than one category. For the first time since 2006-2007, none of the mentors in the incoming cohort have participated before. The selection committee focuses on pairing first-time mentors when suitable matches can be made, to expand participation further.

Elaine Martin completed her three-year term as co-chair and co-chair designate of the Future Leadership Committee in November, in addition to serving earlier as liaison to the Board of Directors and conducting the program evaluation study. Lynn Kasner Morgan and Barbara Epstein will co-chair the committee in 2011-2012, with Julia Sollenberger joining as co-chair designate. All have deep experience with the program and have served as mentors.

2010-2011 Class: Year in Review

The ninth class of fellows and mentors (**Appendix B**) participated in the program during the period from September 2010 through September 2011. Five fellows were selected from an excellent, competitive pool of 17 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 a pool of 11 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. Four mentors were new, and one had been a mentor in an earlier class.

The cohort of fellows and mentors met together with faculty and AAHSL Future Leadership Committee co-chairs and program 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. AAHSL renewed its contract with DeEtta Jones and Kathryn Deiss 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. This year, they were permitted to use any remaining funds in their travel allotment to help them attend a second AAMC conference at the end of their fellowship. 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. The **schedule of program components** is listed in **Appendix C**.

- **Orientation and AAMC meeting:** The orientation (**Appendix D**) for the 2010-2011 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 reports could be shared with individuals and used as the basis for a discussion of intentional leadership. Deiss conducted individual debriefs with the fellows by telephone in advance of the meeting. The fellows and mentors were encouraged to use the profiles in setting goals as they worked on learning plans for the year. The session 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. Mentors shared information on AAHSL's relationship with AAMC and guidance on making the most of attendance at the conference, and the AAHSL Board of Directors greeted the cohort.
- **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. 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. (For the incoming 2011-2012 class, a fourth goal related to the leadership report has been added.)
- **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: budgeting strategies, workforce issues (a new subject in the curriculum), diversity and inclusion, revenue generation (broadened from the previous topic of fundraising), e-science, and power and influence. Mentors, along with Jones, assumed responsibility for presenting and facilitating the sessions. As noted above, the focus on strategic-level thinking was strengthened and reinforced through the assignments. Fellows were asked to respond to a sequence of budgeting scenarios, analyze generational workplace characteristics, investigate institutional diversity and inclusion plans, inventory institutional revenue generation sources and meet with a development officer, interview a basic science or clinical researcher about data issues, and do readings on power and influence. 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 institute program (**Appendix F**) emphasized organizational culture and climate. Prior to the institute, participants completed an exercise to describe the culture of their library and parent organization and how cultural awareness affected an organizational change effort. The program discussed the impact of culture and climate on moving organizations forward and how to achieve culture transformation, as well as the impact on personal career fit. Former fellows Colleen Cuddy, Weill Cornell, and Melissa Just, University of California, San Diego, participated as a guest panel, describing their recent experience in interviewing for directorships and their perspective as new directors and in managing their transition. A guided discussion on organizational strategic priorities, balancing the strategic and operational, and how influence is shaped by leadership preferences concluded the institute.
- **Capstone:** The 2010-2011 class met for the final time at the Capstone (**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 Georgetown University, ARL, NLM, AAMC, LC, NAL, NIH, SPARC, AACN, AAHC, AMIA, and AAHSL generously gave their time to meet with the group. Some of the issues crossing organizational lines were information policy and funding, scholarly communications, health care reimbursement, and collaboration among national libraries. New sessions this year included a meeting with high-level representatives of the three national libraries: Deanna Marcum of LC, Simon Liu of NAL, and Sheldon Kotzin of NLM. Presenters included those who regularly come to the Capstone as well as first-time speakers; their participation seems to strengthen their relationship with AAHSL, in addition to the benefit for the fellows. Connie Poole joined the cohort throughout the third day, representing the AAHSL president, to facilitate an inter-association panel and lead a discussion on the role of AAHSL.

The Capstone occurred earlier than some years to accommodate the calendars of cohort members, though historically three Capstones have taken place in September, three in October, and three in late October/November. The format design encouraged active involvement of the fellows through discussion time with the core group of fellows, mentors, and faculty to supplement the outside presentations. NLM's Library Operations asked fellows to read NLM's print retention and e-journals policies, which aided fellows in engaging in discussion about how their libraries deal with collection issues and expectations for NLM's role. 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.

Capstone speakers and area library leaders were among the invitees to the **reception and graduation ceremony** on the second night, which honors the cohort. Fellows and mentors supplied names of institutional representatives and colleagues so that AAHSL could send invitations and note their completion of the program. Kasner Morgan, Jones, Donald Lindberg, Betsy Humphreys, and Poole recognized their achievement on behalf of the sponsoring organizations, and Tania Bardyn and Julia Sollenberger represented the fellows and mentors in describing their experience. About 30 guests attended the event.

- **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. The visit agendas are anchored by the learning goals of the fellow. Each site visit is unique, depending on the possibilities at the institution and on the fellow's interests and goals. Fellows are able to meet a range of library staff and university or institution officials, participate in and observe library and university meetings and decision making, attend special events, and gain a sense of their mentors' leadership style in his or her organization. Depending on the location, fellows may be able to visit other libraries and directors in the area. The fellows share their expertise and give presentations during the site visits, and the library can benefit from the perspective of the fellows. The site visits are important to fellows in developing the relationship with the mentor, building a network of contacts, gaining ideas to incorporate in their current positions, and expanding their vision. Fellows write reports of their site visits to share with the other fellows and mentors and to extend the value of the visits to the cohort. In addition, fellows and mentors communicate with each other on a regular basis and spend time together at MLA or other events.
- **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 co-chairs also participated in many of the program components, supplying additional perspective as directors or former mentors.

The **summary evaluations from fellows and mentors** are attached as **Appendices H and I**. Overall, they speak 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 evaluation study conducted in 2006-2007.

All Classes

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, with about 50 in attendance. For the third year, the event was scheduled for the Saturday night of MLA, increasing the number of attendees. The reunion is part of the goal to develop a long-term community across cohort lines among the participants in the program.

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 or Jones is available on an as-needed basis, which the committee identifies and approves.

Previous and new mentors met together during the AAMC Annual Meeting for the annual “mentor-the-mentors” session to share their experiences and expectations. Topics included learning goals, site visits, communication with the fellow, incorporating change, relationship with the cohort, impact on mentors, impact on staff, and the role of mentors in supporting program graduates. Several former mentors were assigned areas this year to organize the discussion. Nineteen mentors attended in Denver.

Goals

For the upcoming year, we aim to maintain the strength and diversity of candidate pools and the cohort; examine the experience requirement and refine and communicate selection criteria and application questions; continue to enhance program content and design, focusing on continuity of components, incorporation of self-assessment results, and active fellow participation; facilitate cohort cohesion; support mentors and fellow-mentor pairs; review program evaluation and identify any additional needs; examine means for assisting former fellows in their career progression; and address the ladder of leadership development programs culminating in the Leadership Fellows Program.

AAHSL expresses its gratitude and appreciation for the ongoing collaboration with NLM in making this program possible. NLM’s backing through guidance and participation in program events, as well as through funding, is a key success factor. We thank NLM and the NN/LM for advance payment of program support for the next three years, which provides stability for going forward.

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