

Chicago Collaborative Working Group  
Annual Report  
Submitted to the AAHSL Board, October 30, 2016

The Chicago Collaborative Working Group currently includes three AAHSL representatives, Janice Jaguszewski (co-convenor), Jim Bothmer and Brenda Seago (who was co-convenor in 2015 and agreed to continue to serve when Tom Singarella resigned at the end of 2015). Paul Schoening resigned in early 2016. Ruth Riley served as liaison from the Board, but did not attend meetings.

Other members of the Chicago Collaborative are:

- John Tagler, Association of American Publishers, Professional and Scholarly Publishing Division
- Michael Fitzgerald, Council of Science Editors
- Marty Frank and Jennifer Pesanelli, Federation of American Societies of Experimental Biology
- Richard Gedye, International Association of Science, Technical & Medical Publishers
- Julie Nash, International Society of Managing and Technical Editors
- Jean Shipman, Society for Scholarly Publishing

The Association of American Medical Colleges withdrew its membership in 2015.

Karen Dodson had been contracted to provide logistical support, but her services were discontinued at the end of 2015 to reduce costs.

## 1. Budget

After reviewing revenues and expenses in 2015 and consulting with Ruth Riley and Louise Miller, the co-convenors in January of 2016 (Janice Jaguszewski, AAHSL, and Jennifer Pesanelli, FASEB) recommended ways in which costs could be significantly reduced. They submitted a revised budget for 2016, with the following decisions:

- Discontinue the support services of an outside consultant: \$8550
- Host spring meeting at a publisher campus; publishers' conference support staff will assist with meeting arrangements
- Host fall meeting in conjunction with AAHSL and AAMC; pay headquarters to assist with meeting arrangements (book meeting room, arrange hotel rooms, arrange for food)
- Members will assume responsibility for developing agendas, inviting speakers, taking notes, reporting out
- Maintain membership fee at 2015 rate: \$1800 per year

2. The Chicago Collaborative web site was transferred from the University of Utah to a Google site to facilitate direct updating by co-convenors and members. The URL remains the same: [chicago-collaborative.org](http://chicago-collaborative.org).

3. [Notes from the Fall Meeting](#), November 8 and 9, 2015, are available on the Chicago Collaborative web site

Highlights:

- Author contributorship badges -- to document what an author contributes to a research article
- Discussion on data sharing
- Convey, an online platform developed by AAMC to help physician researchers document financial disclosures in one place (Heather Pierce, AAMC)
- CHORUS update (John Tagler)
- SHARE update (Judy Ruttenberg)
- CrossRef for Funding data -- to record funding sources for scholarly research (Patricia Feeney)
- Ringgold, authority control for institutions (Christine Orr)
- ORCID update (Alice Meadows)

4. [Notes from the Spring Meeting](#), May 1 and 2, 2016, are available on the Chicago Collaborative web site

Highlights:

- CHORUS update from Howard Ratner
- Discussion of Biomedical Publishing online tutorial
- "Improving Openness and Reproducibility of Research," a presentation and discussion with David Mellor from the Center for Open Science

5. The Chicago Collaborative discussed strengthening communication with AAHSL membership. Strategies include:

- Sharing agendas and notes
- Soliciting topics and action items from members
- Providing a CC update at the AAHSL annual meeting
- Hosting a "talk to a publisher" round table session at the AAHSL annual meeting to facilitate constructive conversations with publisher representatives from editorial, technical and executive departments

6. Most significantly, the three AAHSL representatives discussed with Ruth Riley (AAHSL president) and Neil Rambo (AAHSLS president elect) whether the Chicago Collaborative had fulfilled its original purpose of "supporting the AAHSL Board strategy of promoting ongoing dialog and examination of issues of joint concern and importance to AAHSL and STM publishers and editors, and developing and promoting a presence for AAHSL among STM publishers and editors."

Although the conversations are stimulating and the meetings have offered numerous educational opportunities for members, the travel and expense involved in two meetings per year (separate from MLA and AAHSL) are significant, participation is limited to a small number of publisher representatives, primarily from nonprofit and society sectors, and only a few library directors represent the entire membership.

The workload is also considerable for co-convenors who no longer have logistical support from an outside consultant and must arrange dates, locations, accommodations, meals, speakers, technology, etc.

In addition, the AAHSL representatives noted that the discussion topics, publisher relationships, and educational programming could be distributed to other existing AAHSL committees, notably the Research Committee, the Program Committee, and the Scholarly Communications Committee.

As a result, the AAHSL Board asked that the Chicago Collaborative revisit its charge and purpose and consider alternative ways of maintaining a dialog between the library and publishing communities. Current co-convenors, Janice Jaguszewski and Michael Fitzgerald, recommended conducting the fall meeting virtually, but committee members preferred canceling the fall meeting and instead discussing the future of the Collaborative in person in the spring.

The spring meeting is now scheduled for April 29-30, 2017, in Washington, DC, and will be hosted by John Tagler in meeting spaces offered by the Association of American Publishers.

AAHSL Competency-Based Medical Education Task Force Report  
October 31, 2016

AAHSL formed the [Competency-based Medical Education \(CBME\) Task Force](#) on March 3, 2016 in order to identify the nature and depth of AAHSL Libraries' participation in the changes taking place in medical curricula highlighted by the adoption of Core Entrustable Professional Activities (Core EPAs). Core EPAs relating to evidence-based practice, interprofessional practice, and patient safety, dovetail with roles and expertise of medical librarians working with medical school curricula. Yet more information was needed to ascertain the state of medical library involvement in these evolving areas and communicate with key stakeholders. Task Force members met for the first time in-person at the Medical Library Association Conference in Toronto, Canada on May 16, 2016. Since that time they have been meeting bi-monthly via *Zoom* video conferencing to address the initial charges to:

- Identify AAHSL libraries that are participating to a significant degree in incorporating Core EPAs in the medical education curriculum, through design, development, teaching, evaluation, and/or similar engagement.
- Develop a methodology to characterize the nature and depth of the participation.
- Map and cross-reference existing ACGME, AAMC, LCME, and other EBM competencies as identified by the Task Force. Identify gaps in EBM competencies.
- Compose a white paper or similar work for publication on the state of the art of libraries' roles and involvement in all phases of competency-based medical education. Include recommendations for additional work that is needed (e.g., developing standard definitions of EBM concepts, translating EBM concepts into teachable components, evaluation of the effectiveness of EBM curriculum.)

To date, the following elements of an environmental scan have been completed:

- A thorough literature review of scholarship discussing the intersection of medical library work with competency-based medical education or new EPAs.
- Focus-group interviews of selected librarians at AAMC Core EPA pilot schools. (Focus group data was used to create a research design for exploring the topic.)
- A survey of AAHSL member libraries on the involvement of libraries in competency-based medical education. 81 of the 130 full AAHSL member libraries responded. The survey closed Friday November 4, 2016.
  - A trend in the survey data showed a minority, but growing number of libraries involved in Core EPA collaboration. Libraries cited heaviest involvement in Core EPAs 7, 9 and 13. The most frequently noted barriers or challenges to librarian participation in Core EPAs at their respective institutions included a lack of time in the curriculum, a lack of models from other libraries in implementing Core EPAs, and a lack of resources (i.e. time and money). Further data analysis is in progress to identify additional trends, gaps and opportunities.

In addition to addressing the Task Force charges, the group also recognized a pressing need to communicate with fellow librarians on rising elements of competency-based medical education curricula as well as progress toward the outlined charge. To that end, the following presentations/posters have been shared or will soon be shared:

**AAHSL CBME Task Force Presentations/Posters:**

**July 20, 2016.** Webinar presentation for NNLM/Pacific Southwest Regional Medical Library “Entrustable Professional Activities” by Rikke Ogawa: Archived at <https://webmeeting.nih.gov/p2ncpio08wa/>

**Sept 26, 2016.** AAHSL Task Force Evaluating AAMC Core EPAs. Poster presented by Megan Von Isenburg and Joey Nicholson at the Tri-Chapter (Mid-Atlantic Chapter, the New York- New jersey Chapter and Philadelphia Regional Chapter of the Medical Library Association)- The 3 Ls- Librarians, Leadership and Learning. Philadelphia, PA. <http://macmla.libguides.com/tri-chapter2016-posters>

**October 5, 2016.** AAHSL task force evaluating AAMC Core EPAs. Poster to be presented by Emily Brennan at the Southern Chapter of the Medical Library Association SC/MLA Annual Conference. Greenville, SC.

**October 23, 2016.** AAHSL Task Force Evaluating AAMC Core EPAs by Kelly Thormodson and Heather Collins to be presented at the Joint Meeting of the Midwest Chapter and Midcontinental Chapter of the Medical Library Association “Merge & Converge Sixteen in ‘16”. Des Moines, IA. <http://midwestmla.org/conference2016/wordpress/program/papers/>

**October 25, 2016.** Spotlight Talk, “AAHSL Task Force, Evaluating AAMC Core EPAs” by Judy Spak, to be presented at the North Atlantic Health Sciences Libraries (NAHSL) Chapter Meeting. New Haven, CT. <http://www.nahsl2016.com/>

**November 13, 2016.** AAHSL Task Force Investigating Librarian Involvement in AAMC Core EPAs. Poster *proposed* to EPAs Across the Continuum- A Poster Session at AAMC 2016. Seattle, WA.

**March 22-25, 2017.** AAHSL task force evaluating AAMC Core EPAs [working title]. Poster *proposed* to the Association of College and Research Libraries Annual Conference. Baltimore, MD.

The Task Force is comprised of noted experts in information literacy and medical education from various regions. It is chaired by Heather Collins at the University of Kansas Medical Center with Neil Rambo, AAHSL President-Elect from New York University serving as Board Liaison. Members include:

- Nancy Adams, Penn State
- Emily Brennan, Medical University of South Carolina
- Megan Von Isenburg, Duke University
- Iris Kovar-Gough, Michigan State University
- Elizabeth Lorbeer, Western Michigan University
- Joey Nicholson, New York University
- Rikke Ogawa, University of California Los Angeles
- Judy Spak, Yale University
- Kelly Thormodson, University of North Dakota

Submitted by:  
Heather Collins, Chair

## AAHSL FUTURE LEADERSHIP COMMITTEE 2016 ANNUAL REPORT

### Summary

The AAHSL Future Leadership Committee (FLC) continues to actively promote recruitment and development of first-class leaders in academic health sciences libraries, through activities in the areas of recruitment, education/training/mentoring, and research. This year the committee completed the year-long New Directors Symposium, and revised and published the 2016 edition of its Recruitment Guide, while continuing its Fellows Program and Scholarships Program. At the Board's request the Committee also administered a one-time Data Management Scholarship Award Program.

The Future Leadership Committee will meet in person on November 11 in Seattle, in addition to working by telephone using GlobalMeet conferencing and e-mail. The chairs met on a monthly basis with the program director via telephone to lead the program planning process, manage the budget, and coordinate communications between the Board, committee members, and program participants. Following the 2015 meeting in Baltimore, members were assigned to program areas of the committee and worked in coordination with the program director and chairs.

The Leadership Fellows Program has completed 14 years, its successes a result of the support of the sponsors—NLM and AAHSL—and the contributions of fellows, mentors, and committee members. Former fellows John Gallagher (Yale University) and Melissa De Santis (University of Colorado) assumed permanent director positions in 2016. Four fellows are currently serving as interim directors (Rick Fought, University of Tennessee; Michele Tennant, University of Florida; Mary Piorun, University of Massachusetts; and Kelly Thormodson, University of North Dakota). Overall, 44% of Fellows have been named permanent directors or interim director since the program began.

The fifteenth class of Fellows began its program on Nov. 10. Three mentors are participating in the program for the first time, and two have served previously as mentors. The committee is proud that once again a former fellow (Laura Cousineau) has been selected to be a mentor.

The NLM has extended the Memorandum of Agreement with NLM for partial funding of the Leadership Fellows Program for another year, through the 2016–2017 class in the amount of \$65,000. We remain very grateful for NLM's continued support.

The committee planned and carried out the fourth New Directors Symposium (NDS) which began in November 2015 and concluded in May 2016. Attendees gave the program positive reviews.

Carol Jenkins is completing her third year as committee Leadership Program Director and is responsible for curriculum management of the Fellows Program as well as program planning and management of all other committee responsibilities, liaison with the committee and logistics coordination with the AAHSL Office. The Office is responsible for event planning, budget management and logistics. The committee uses Basecamp to coordinate program management

and communications, and foster community. Basecamp was used successfully by the Leadership Fellows cohort, Scholarships committee, Leadership Fellows Selection committee, Recruitment Guide committee, NDS Planning committee and NDS attendees cohort.

The FLC programs, notably the Fellows program, have become more expensive mainly due to cost increases in travel and events. The Committee's budget maintained overall costs for the 2016 Fellows Program, keeping to a maximum of five fellows for the year. NDS expenses exceeded what had been budgeted.

The accomplishments for 2016 are described below for the major areas of committee focus.

### **NLM/AAHSL Leadership Fellows Program**

Committee working group: Albright, Bardyn, Berryman, Franklin, Jenkins, Muellenbach

The 14th class completed its year on September 21, 2016. Fellows (Stephen Kiyoi, Rick Fought, Dale Prince, Stephanie Schulte and Stephanie Kerns) and mentors (Holly Shipp Buchanan, Andrea Twiss-Brooks, Tony Frisby, Patricia Thibodeau, and Julia Sollenberger) worked together in fellow/mentor pairs.

Fellows communicated with their mentors on a frequent basis throughout the year. All fellows spent two weeks on site visits at their mentors' home libraries in one-week segments, with visits anchored by the learning goals of the fellows. Site visit principles developed by the program director were shared with the cohort in November. 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 institutions, and gain a sense of their mentors' leadership styles. 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.

Building on the Orientation and learning plans, the group met on a monthly basis in 2015-16 for virtual sessions and in-person meetings. Mentors and their fellows developed virtual presentations and facilitated the discussion for the sessions held on the third Wednesday of each month. Topics covered were power and influence (Frisby and Prince), enhanced library roles (Thibodeau and Schulte), workforce issues (Sollenberger and Kerns), institutional/managerial finance (Buchanan and Kiyoi), strategic planning (Deiss), and crisis management (Twiss Brooks and Fought). DeEtta Jones, consultant, also led a virtual discussion on cross cultural competence. Fellows were asked to undertake substantive assignments in preparation with the goal to encourage them to think strategically at a director level. Mentors contributed their own experience and perspectives to the discussions.

The cohort also worked together face-to-face with faculty and committee leadership, providing the opportunity for fellows to get to know other directors better. They benefited greatly from faculty Kathryn Deiss, who has a long-term association with the program and met in-person with the cohort three times during the year. Kathryn retired from her job at ACRL in January, but continues consulting with AAHSL and other clients.

The full-day Leadership Institute held in Toronto, Ont., CA, on May 13, 2016, focused on developing versatile leadership and practical career guidance for fellows as they prepare for director positions. Kathryn Deiss facilitated the full-day Leadership Institute. A mock interview exercise was included. Former fellows Anne Seymour, Director, Welch Medical Library, Johns Hopkins University, and Deborah Sibley, Director of Libraries, LSU Health, New Orleans, described their recent experience in interviewing, the hiring experience, and perspective as new directors. The institute also included a guided discussion on organizational culture, the life of a director, and benefits and costs of leadership.

Again this year the committee organized and sponsored a reunion social gathering for all current and prior fellows and mentors, as well as AAHSL and NLM leadership; with help from the AAHSL Office. Approximately 85 persons attended the event held at the Delta Toronto Hotel.

The 2015-2016 class met for the final time at the Capstone in Washington, DC, September 19-21, 2016. 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 NLM, NIH, AAMC, LC, NAL, IMLS, SPARC, ARL, ALA, OSTP, AACN, AACP, ADEA, AMIA, and AAHSL met with the group. Issues of current priority for academic health sciences libraries include information policy and funding, scholarly communication, data management, the changing role of national libraries, interprofessional education and team-based care, and diversity. Presenters included those who regularly come to the Capstone as well as some first-time speakers such as Kathy McGuinn (AACN), Leo Rouse (ADEA), Heather Sacks, Stephen Heinig, Tannaz Rasouli and Kate McOwen (all from AAMC), William Lang (AACP), Michelle Dunn (NIH), Robin Dale (IMLS), Blane Dessy (LC), and Stan Kosecki (NAL). A highlight was the opportunity for conversation with Patricia Flatley Brennan, newly appointed NLM Director. Their participation strengthened their relationship with AAHSL, in addition to benefiting the fellows. 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 and local library leaders from the area. There were about 45 attendees. Sandra Franklin, FLC Chair; Kathryn Deiss, Program Consultant; Patricia Flatley Brennan, NLM Director; Betsy Humphreys, NLM Deputy Director; Holly Buchanan, Mentor; Stephen Kiyoi, Fellow; Ruth Riley, AAHSL President and Carol Jenkins, Program Director made remarks.

The call for applications for the 2016-2017 class was widely disseminated, with an application deadline of July 22. This deadline is ten days earlier than in the past, by request to the committee. The FLC is evaluating whether to continue this earlier date, which gives those selected more notice to plan fall meetings but also overlaps other committee deadlines. Beyond AAHSL, announcements were sent to major library associations and e-mail lists, groups and institutions reaching related or underrepresented audiences, and program alumni. From a group of 14 outstanding applicants, a competitive process resulted in the selection of the 15th class of fellows. The cohort size was maintained at five fellows for budgetary compliance. Fourteen directors were considered in a preliminary pool of mentors. Each fellow is matched with a mentor director based on his/her interest and availability, and who can best provide a rewarding fellowship experience addressing the fellow's particular goals. The committee identified up to

three good mentor matches for each fellow selected, and then asked each fellow to indicate his/her preference. Three mentors are participating in the program for the first time, and two have served previously as mentors. The new fellows and their mentors are Beth Ketterman (ECU) and MJ Tooley (UMD); Will Olmstadt (LSU) and Michael Kronenfeld (ATSU); Sandra DeGroot (UIC) and Laura Cousineau (Dartmouth); Melissa Rethlefsen (Utah) and Judy Cohn (Rutgers); and Jean Song (UM) and Cynthia Henderson (USC). The committee is proud that once again a former fellow (Laura Cousineau) has been selected to be a mentor.

The new class will attend the AAMC/AAHSL meetings in Seattle and hold its Orientation with faculty and committee representatives on November 10. In preparation, members will complete leadership assessment instruments, and Kathryn Deiss will hold one-on-one debriefing telephone conversations with fellows to enhance use of the leadership reports as developmental opportunities to pursue during the program experience. The Orientation will include introductions and group debriefing of the leadership instruments, along with facilitated discussions of program expectations, intentional leadership, mentoring relationships, and environmental scanning. This year a 'levels of leadership' design framework written by the Nexus II project (see below for more information), will be introduced to guide personal goal setting and inform program evaluation. A separate orientation meeting for mentors will be led by committee chairs (Eric Albright, Sandra Franklin, Tania Bardyn, Paul Schoening) and Carol Jenkins) on November 12.

With the selection of the incoming 2017 class, 77 fellows and 65 different mentors will have participated in the program. Well over half of AAHSL institutions have had at least one mentor or fellow on staff or have hired a fellow.

The committee relies on RML libraries and Centers to provide technical support for Adobe Connect used for virtual sessions. Thanks to Tony Nguyen of the Southeastern Atlantic Region of the NN/LM, who assisted with the Leadership Fellows Program and the New Directors Symposium virtual sessions this year. The program will move in 2017 to the WebEx platform, with continued support from the RML. One result of this move is that archiving of video instructional sessions will move from NIH to the AAHSL Office. This is currently being explored.

### **Scholarships**

Committee working group: Gallagher (chair), Albright, Bardyn, Franklin, Jenkins

#### **Data Management Scholarships**

This subcommittee developed criteria for a one-time award of data management scholarships, made possible by the gift back to AAHSL of the honorarium to the 2015 Matheson Lecturer, Dr. Philip Bourne, Associate Director for Data Science, National Institutes of Health. AAHSL provided a supplement making a total of \$10,000 available to award. The subcommittee administered the selection and award of nine scholarships. Awards were presented to: Pamela Bagley, Biomedical Library, Dartmouth; Michelle Bass, John Crerar Library, Univ. of Chicago; and Margaret Henderson, University Libraries, Virginia Commonwealth Univ.; all to attend Research Access and Data Preservation Summit (RDAP), Atlanta, GA; and to Marisa

Conte, Taubman Library, Univ. Michigan; Jean-Paul Courneya, Health/Human Services Library, Univ. Md; and Alisa Surkis, NYU Health Sciences Library; all to complete a series of online courses (Coursera) leading to a certificate in data science specialization. Awards also were made to Andrea Ketchum, Health Sciences Lib. System, U. Pittsburgh, to attend the Conference of Force 11: the Future of Research Communications and eScholarship, Portland, OR; Kate Nyhan, Cushing Whitney Med. Library, Yale Univ., to attend one of four classes at the Graduate Summer Institute of Epidemiology and Biostatistics at Johns Hopkins Univ.; and Kevin Read, NYU Health Sciences Library, to take certified clinical data management courses of the Society of Clinical Data Management. The level of interest and the quality and diversity of professional development ideas from all the applicants was impressive, as was the list of opportunities considered. This list was subsequently shared with AAHSL's Research Services Committee. Recipients were asked to submit brief reports to be posted on the AAHSL web site (add site url when available).

### Leadership Scholarships

In addition to managing the data scholarships, the subcommittee administered the award of five leadership scholarships totaling \$10,000. Scholarships were presented to Lindsey Sikora, University of Ottawa, to attend the 2016 Northern Exposure to Leadership Institute in Alberta, Canada; and to each of the following librarians to attend the 2016 Harvard Leadership Institute for Academic Librarians: Jonathan Hartmann, Georgetown University; Lisa Traditi, University of Colorado Anschutz Medical Campus; Heather Holmes, Medical University of South Carolina; and Susan Steelman, University of Arkansas for Medical Sciences. In addition, an out-of-cycle award was made to Beth Ketterman, East Carolina University, to attend the Womens Negotiation Academy using funds carried over from 2015. No funds from 2016 were reserved for out-of-cycle requests.

AAHSL Leadership Scholarships support career development opportunities for persons interested in leadership roles in academic health sciences libraries. Their institutions share in the costs of supporting participation in the programs. The scholarships are part of the continuum of AAHSL leadership programs. Reports from all scholarship awardees evaluating their training are posted at:

[http://www.aahsl.org/assets/2016/2016\\_aashl\\_report\\_from\\_leadership\\_scholars\\_update.pdf](http://www.aahsl.org/assets/2016/2016_aashl_report_from_leadership_scholars_update.pdf)

Since 2003, 70 leadership scholarships have been awarded.

### Continuing Education Course

Committee working group: Heilemann, Tooley

M.J. Tooley and Heidi Heilemann continue to serve as the instructor team for MLA CE 202 "Do You Want to Be a Library Director: Knowledge, Skills and Career Paths." The course will not be offered in 2017, while the instructors evaluate new approaches and consider additional instructors. They plan to offer the course at MLA in 2018 and perhaps have a version appropriate for regional meetings.

### New Directors Symposium

Committee working group: Robinson (chair), Dexter, Rand, Albright, Bardyn, Franklin, Jenkins

A subcommittee chaired by Cynthia Robinson planned the NDS beginning in 2014. New directors were surveyed in the fall of 2014 to gather input on length, programmatic needs, desired approach, and ability for host institution funding. The call for participation in the New Directors Symposium went out on June 20, 2015. Twenty-nine directors, the highest number in the program's history, were admitted into the program. The Board approved additional funding towards NDS to cover higher than anticipated costs. The Symposium began in Baltimore following the AAHSL meeting, with a session led by consultant Maureen Sullivan, followed by two on-site sessions in Baltimore, and concluded with another on-site session in Toronto just prior to the 2016 MLA meeting, facilitated by consultant Kathryn Deiss. In between there were webinars on topics including financial management, the roles of research libraries, and organizations such as AMIA, AAMC, and IMLS. There were eight external program faculty including, in addition to program consultants, Betsy Humphreys from NLM; Elliott Shore, ARL; and Catherine Lucey and Kevin Souza from UCSF. Fourteen AAHSL directors, in addition to committee members themselves, shared their expertise with attendees. The topics addressed aspects of leadership styles and skills, and strategic and environmental issues affecting academic health sciences libraries. Program content was developed based on issues raised by attendees in their applications. AAHSL President Ruth Riley presented certificates to attendees at the end of the program in Toronto.

Following completion of the program, an evaluation was sent via survey monkey to all attendees of the NDS. Twenty-two, or 75.9% of attendees, responded. They were asked to rate the usefulness of each program session, as well as the overall approach. Responses were very positive about the approach (mixture of on-site and online) as well as the content. There were excellent suggestions about topics that could be considered by future program planners. Respondents indicated that the online platform worked well for virtual sessions, as did the Basecamp project for group communication.

Total funding for the 4<sup>th</sup> NDS was approximately \$37,000, which covered all management and direct program costs. Attendees paid no registration fee, but covered their own costs to attend the on-site sessions. A full report of the NDS including appendices is available. Given the time and effort involved in planning the NDS and its increased cost over previous symposia, and the continued turnover in directorships, the Committee makes the following recommendation:

NDS is considered very valuable by its graduates and it needs to be timely to be most effective. As long as the number of new directors warrants, consider simpler approaches that might be feasible to offer at least every two years, while being cost and time efficient.

### **Marketing**

Committee working group: Berryman, Jenkins, Albright, Bardyn, Franklin

The goal to improve the effectiveness of marketing the Leadership Programs continued this year; but other responsibilities prevented it from getting much attention. Changes to the website implemented last year make the leadership programs more findable. Press releases about the Leadership Fellows Program are shared widely with library groups and institutions during recruitment and announcement of the cohort, and information about other committee activities is publicized.

### **Recruitment Guide**

Committee working group: Knott, Parker-Kelly, Albright, Bardyn, Franklin, Jenkins

The AAHSL recruitment guide, *Recruiting and Selecting Academic Health Sciences Library Directors: A Guide* ([http://www.aahsl.org/assets/2012/2012\\_aahsl\\_recruitguide.pdf](http://www.aahsl.org/assets/2012/2012_aahsl_recruitguide.pdf)), was extensively revised and updated this year. A revised draft was reviewed by committee chairs and one external reviewer (Univ. Libs. HR Director at VCU). The 2016 Guide will be published online this year. The committee will continue to revise and improve the guide and welcomes suggestions from members.

### **Nexus II – Leading Across Boundaries**

During 2016 program director Carol Jenkins continued to represent AAHSL in a leadership development project called Nexus II, funded by IMLS. The project began in 2013 with an IMLS planning grant. Curriculum content is being created for leadership training in areas shared by libraries and other cultural institutions; as well as evaluation instruments to measure learning. A Design Framework has been published that outlines skills needed at various levels of leadership within organizations, institutions, and professions. Evaluation instruments have also been developed. Curriculum modules and evaluation instruments will be pilot tested in the coming year. The Leadership Fellows Program hopes to test several Nexus elements with the 2016-17 class. With the need for new leaders increasing across all sectors, this project may provide AAHSL an opportunity for program enrichment and sharing. More information about Nexus II is available here: <https://educopia.org/research/grants/nexus-lab-leading-across-boundaries>

### **Transitions**

The committee extends its thanks to Tania Bardyn, outgoing past chair; and to Debra Rand, Nadine Dexter, Teresa Knott and Cynthia Robinson, for their excellent contributions. Nadine Dexter left the committee in January following election to the Board of Directors, but continued to work with the committee on the NDS. We welcome the following new members (terms 2017–2019): Amy Lyons, Jonquil Feldman, and Paul Schoening (chair designate).

### **AAHSL Future Leadership Committee**

Terms expiring in 2016:  
Debra Rand (extended one year to 2016)  
Teresa Knott

Tania Bardyn, Immediate Past Chair  
Cynthia Robinson (reappointed to 2016)

Terms expiring in 2017:  
Donna Berryman  
John Gallagher  
Sandra Franklin, Chair

Terms expiring in 2018:  
Darlene Parker Kelly  
Joanne Muellenbach  
Eric Albright, Incoming Chair

Terms expiring in 2019:  
Amy Lyons  
Jonquil Feldman  
Paul Schoening, Chair Designate

Nadine Dexter, Board of Directors Liaison  
Carol Jenkins, Program Director

Submitted on October 24, 2016 on behalf of the FLC by Carol Jenkins

# NEW & DEVELOPING ACADEMIC HEALTH SCIENCES LIBRARIES (NDHSL) COMMITTEE

## Report for AAHSL Board – November 2016

### MLA News “Born Digital” Article Series Continues

---

Under the leadership of committee member **Nadine Dexter**, Director of the Health Sciences Library at the University of Central Florida College of Medicine, *MLA News* now features a “Born Digital” article series. The series informs readers about “born digital” successes, struggles and initiatives.

The first article, by Nadine and **Elizabeth (Liz) Lorbeer**, was an introduction and overview of the Born Digital series. The second article, by **Joanne Muellenbach** and **Matthew Wilcox** was on the topic of library space planning. A third installment on staffing was co-authored by Nadine and **Bradley Long**.

Upcoming articles will focus on LCME Requirements and Medical Informatics.

### Mentor Program

---

Committee member **Joanne Muellenbach**, Director of the Health Sciences Library at the University of Nevada- Las Vegas, has developed a framework for a mentor program for new and developing health sciences libraries.

#### Overview

The Mentoring Program is being established in order to provide new library directors, or those in a medical library leadership role, for new and developing medical colleges, with advice and guidance, as well as the opportunity to work together and to network within the AAHSL community.

Mentors will be current members of AAHSL who have agreed to advise and guide the new library directors or medical library leaders, of new and developing medical colleges. AAHSL mentors will guide AAHSL mentees as they learn about their new roles, and in their future goals. The AAHSL New & Developing Academic Health Sciences Libraries Committee will pair mentors with mentees.

## Committee Activities & Updates

---

The Committee held an open meeting at the May 2016 MLA Conference in Toronto.

**New Schools:** New Applicant and Candidate MD Programs schools include:

- California University of Science and Medicine, College of Medicine, in Colton, CA.
- Seton Hall – Hackensack School of Medicine, in South Orange, NJ.
- TCU and UNTHSC School of Medicine in Fort Worth, TX.
- College of Henricopolis School of Medicine, in Martinsville, VA.
- Washington State University Elson S. Floyd College of Medicine, in Spokane, WA.

### Individual Updates

**Lisa Ennis**, Library Director, Alabama College of Osteopathic Medicine, in Dothan, Alabama. Barbara Shearer has retired, and Lisa has been named the new Library Director. Their Doctor of Osteopathic Medicine program has an enrollment of 120 students per class. They have embedded three courses in their Simulation Lab. Regarding their information literacy agenda, they are tying the entrustable professional activities (EPAs) into their information literacy instruction. They have 3 hours within the first year. In their 3rd year, the students are involved in research projects, and the librarians help with citation management.

**Barbara Miller**, Library Director, Cooper Medical, Rowan University, New Jersey. In March, they had their LCME Accreditation Site Visit, and the library received high ratings for their excellent staff, but low ratings for space. Students let the LCME visitors know that the library study space was not sufficient for their needs. Barbara mentioned that this has been an issue for a long time. They do not have study carrels, and their learning commons is cafeteria-style. Their budget is sufficient; integration of information literacy is good; and librarians are very involved in the curriculum. They also have a school of osteopathic medicine at Rowan.

**Debra Rand**, Associate Dean for Library Services, Hofstra Northwell School of Medicine, New York. They have graduated their second class. They have a very small space but there is study space throughout the School's building. They been partnering with the research unit to work on research and education metrics, and in implementing ORCID accounts. They have been involved in creating a new authorship policy to standardize the words used publicly to describe the medical school or university. They are working on how to serve the community hospital with no library staff.

**Joanne Muellenbach**, Founding Library Director, Health Sciences Library, UNLV, Nevada. Their LCME Accreditation Site Visit is scheduled for July 18-20, 2016. LCME will make a decision regarding their accreditation in October. At that point, assuming good news from LCME, they will begin recruiting a charter class of sixty students for a July 2017 matriculation. Joanne is working with the Dean of Libraries and an in-house designer on library space requirements, for the two, interim health sciences libraries, as well as for the permanent library space. Joanne is also in the process of recruiting two health sciences librarians. She is working with the Head of Web Services on the development of a health sciences library website. Joanne is also working closely with the Vice Dean for Academic Affairs and Education, and her team, in order to inform her collection development and information literacy plans.

**Matthew Wilcox**, Library Director, Quinnipiac University, Connecticut. He is currently waiting on the budget process, having asked for a 13% increase. He has heard the budget will be flat but made his case with the University Librarian and is second from the top of priorities. Their 4th year class of 60 students (LCME capped their classes at 90) just started their clerkships. In October they will have an LCME site visit. They have integrated the ACRL Framework into nursing courses and are working with the research methods course. The next plan is for the PA program. He has 5.5 FTE staff with Tech Services functions supported by the main library.

**Nancy Bulgarelli**, Library Director, Oakland University, Michigan. They just graduated their second class. They are beginning to implement ORCID accounts. During library orientation, librarians will have them create their ORCID IDs. They are looking at a platform for faculty profiles. Their instruction changes every year, but this year they will teach in EBM during the second week and during capstone.

**Kitti Canepi**, Director of Library Services, Roseman University of Health Sciences, Nevada. They had their LCME site visit in February and will find out after the June LCME meeting if they have preliminary accreditation.

**Lisa Marks**, Library Director, Mayo Clinic, Arizona. They will be starting 50 student July 17. Currently they are renovating a research space for the library.

**Nadine Dexter**, Library Director, College of Medicine, University of Central Florida. They just graduated their 4th class. On October 17 they will have an LCME site visit, for their 2nd year since full accreditation.

## **AAHSL Program and Education Committee 2016 Annual Report**

### **Committee Members**

Rick Brewer, University of Kentucky, 11/14-11/17  
Allysha Eyler, Fred Hutchinson Cancer Res Center, 11/15-11/18  
Heidi Heilemann, Stanford University School of Medicine, 11/16-11/17  
Shannon Jones, Medical University of South Carolina, 11/15-11/18  
Christina Pope, SUNY Upstate Medical University, 11/13-11/16  
Ruth Riley, University of South Carolina, (Board Liaison), 2016  
Leslie Schick, University of Cincinnati, 11/12-11/16  
M.J. Tooley, University of Maryland, 11/13-11/16  
Deborah Ward, University of Missouri, (incoming Chair), 11/15-11/18  
Jeff Williams, New York University, (Chair), 11/14-11/17

### **Planning**

The Committee began significant planning for the Education Program in February of 2016. A series of conference calls and an in-person meeting at the MLA Annual Meeting facilitated planning for the Education Program. Planning began with a review of the successful 2015 Education Program evaluations. The Committee hoped to build on the success of 2015 Program format.

### **Education Program**

The Committee quickly coalesced around the idea of developing a program around strategic communication with stakeholders. As this idea evolved, the Committee decided to identify and secure a speaker with expertise in this area, and the broader professional area of marketing and branding. A speaker in the Seattle area was identified, and a contractual arrangement was made with Stephanie Worrell to present and facilitate the program.

The final program is included as an appendix to this report.

### **Matheson Lecture**

Christina Pope and Shannon Jones volunteered to assist Jeff Williams in identifying and securing a 2016 Matheson Lecturer. Based on continuing challenges raised by AAMC's exclusion of affiliated group content from the main days of the AAMC Annual Conference, the AAHSL Executive Board directed the Program & Education Committee to include the Lecture as part of AAHSL Annual Meeting.

Although a number of potential speakers were discussed, the group wanted to capitalize on the opportunity presented by the appointment of Dr. Patricia Brennan as the new director of the National Library of Medicine (NLM). The group members

believed that this was a unique opportunity for Dr. Brennan to introduce herself to the academic health sciences library community, and learn about her plans and vision for this important institution. The group was thrilled when Dr. Brennan quickly and enthusiastically agreed to present the 2016 Matheson Lecture.

### **2017 Committee Planning**

Deborah Ward will serve as committee chair in 2017.

The following new members will join:

Fatima Barnes, Howard University , 11/16-11/19

Tiffany Moxham, University of California, Riverside, 11/16-11/19

Neil Romanosky, University of Toronto, 11/16-11/19

Respectively submitted,

Jeff Williams

Chair, Program and Education Committee

## Introduction

Each of our libraries exist within unique environments that drive our activities. Across our organizations, we allocate resources based on local missions, visions, and strategic priorities. This results in different value propositions that we must communicate to our administrators, stakeholders, and peers.

---

## Program

### ***What You Need To Know To Build Effective Marketing Strategy***

The presenter will introduce marketing principles that are crucial for any administrator wanting to ensure their library remains strong, successful, understood, and valued by all stakeholders. An administrator must be able to identify, measure, and strategically communicate how their library adds value for their stakeholders and institution.

During this program, participants will learn about the different foundational elements needed in order to develop an effective marketing and communication strategy. Libraries are in the midst of a revolutionary change. Your users are in control. They have gone from passive visitors to active consumers who demand services. They are ready to embrace the function of the library as long as it gives them genuine solutions. Building the foundation of your library begins with understanding:

- Who – Your users
- What – Reasons to believe in your library services
- How – Optimize your value proposition

In addition, the program will address how to look at your library as an overarching brand that has multiple offerings. Understanding the needs of your users in conjunction with the services offered will aid as a guide to understand appropriate opportunities for your library.

---

## Program Schedule

The program will include three sessions:

1. A practical introduction to marketing basics essential for any library administrator.
  2. Four 10-minute [case studies](#) from our peers detailing successful marketing program at their institutions.
  3. Group activities providing the opportunity to ground the program's content in their local environment through guided peer discussion.
- 

## Expected Takeaway

The expected takeaway for program participants is a renewed understanding of the resources, and anticipated outcome of conducting a well-designed and executed marketing plan at their institution.

---

## Speaker Bio

Stephanie Worrell is a brand strategist with over 25 years of experience building consumer brands. Her expertise comes from her career-spanning role as account manager for global design agency LPK where she led brand identity initiatives for a variety of companies including Proctor & Gamble, Heinz, Novartis and Ventura Foods. Today, she works as an independent brand strategy and design consultant in both the public and private sectors. Stephanie brings her own blend of insight, passion and humanity to the projects she leads. Her expertise includes marketing, branding, market research, product positioning and creative strategy. Known as a caring and collaborative partner, she applies her knowledge and experience to help her clients differentiate their brands and products from their competition.

---

Stephanie is also a community advocate and has always given her time to support causes that support breast cancer, children and women. She spends her leisure time doting on her year old granddaughter and exploring the outdoor life in the great Northwest. Stephanie holds a Bachelor of Science in Graphic Design and Marketing from the University of Cincinnati's world-renowned School of Design, Architecture, Art, and Planning (DAAP).

---

## Case Studies

- 1. *Collaborating Across the Institution to Promote the Library***  
Kristi Holmes  
Director, Galter Health Science Library, Northwestern University
  - 2. *Promoting "Space as a Service" at the University of Minnesota***  
Janice Jaguszewski  
Associate University Librarian, and Director  
Health Sciences Libraries, University of Minnesota
  - 3. *Marketing a New Digital Library at a Developing Medical School***  
Elizabeth Lorbeer  
Library Director, Western Michigan University School of Medicine
  - 4. *Effective Communications Committee (ECC) Targets Marketing, Branding, and Public Relations***  
M.J. Tooley  
Associate Vice President for Academic Affairs and Executive Director  
Health Sciences and Human Services Library, University of Maryland
-

**AAHSL Research Services Committee  
Annual Report 2016  
October 31, 2016**

Key accomplishments for the AAHSL Research Services Committee during the 2016 year include progress on areas related to the committee's charge and also the establishment of infrastructure and work processes to carry out the committee's charge. Phone meetings are held on the third Thursday of each month from 3:00-4:00 PM Eastern. A collaborative workspace was established in Box for the committee members.

**Key work areas during the 2016 year include:**

- An in-depth discussion of the concept of "The Research Lifecycle" and how our perception of this concept influences the work of libraries
  - Initial work for a research lifecycle survey for researchers and for library leadership
  - Collection of survey questions and published papers that can shape demographic/topic questions for a survey about the research lifecycle
  - Collection of visual representations of the research lifecycle
  - Contemplation of library-defined versus researcher-defined constructs
  - Development of a plan to develop and deliver the survey in early 2017, with an educational component for AAHSL members in 2017
- The group is also interested in supporting initiatives that support our members on topics related to research information systems, business intelligence, and related topics. We have looked into the possibility of developing a virtual or in-person event to support this topic in 2017.
- Membership: We have a vacancy on the AAHSL RSC committee. Please contact Neil Rambo or Kristi Holmes if you would like to serve as a member of this committee. Kristi Holmes will continue in the role of committee chair for 2017 to provide continuity for ongoing projects.

The Research Services Committee welcomes input from all AAHSL members. Please direct comments and questions to any of the members listed below:

<b>Membership</b>	<b>Institution</b>	<b>Term of Office</b>
Kristi Holmes, Chair	Northwestern University	8/15-11/18
Keith Cogdill	NIH	8/15-11/18
Lynda Hartel	Ohio State University	8/15-11/17
Anne Linton	George Washington University	8/15-11/18
Bart Ragon	University of Virginia	8/15-11/17
Cathy Sarli	Washington University	8/15-11/17
Anne Seymour	Johns Hopkins University	8/15-11/18
Terrie Wheeler	Cornell University	8/15-11/18
Neil Rambo, Board Liaison	NYU	11/15-11/16
Vacancy	Open	8/15-11/17

**Committee Charge**

1. Oversee and coordinate AAHSL's efforts to enhance research support services in member libraries through educational programs, workforce development, best practices and resource material
2. Undertake periodic surveys of AAHSL members to identify research support services provided by AAHSL libraries and prioritize those to be addressed by the committee
3. Provide training and development opportunities to keep AAHSL members abreast of research trends
4. When possible partner with the AAMC Group on Information Resources on research initiatives where there is mutual interest
5. Deliver a committee work plan to the AAHSL Board on a yearly basis.

*The AAHSL Research Services Committee was launched in August 2015.*

## AAHSL Scholarly Communication Committee

### Annual Report 2016

ICMJE Data Sharing Policy – The committee collected feedback on the ICMJE proposed data sharing policy and submitted it online. It was shared with all AAHSL members.

BioMed Publishing 101 Course – Created by the Chicago Collaborative several years ago, AAHSL was asked to consider offering the course to its members. A survey conducted last fall indicated there was interest in online Webinars, but the content might need to be revised. The committee agreed to explore this more, but to also make it available to MLA as well as AAHSL members, if possible. The committee chair reached out to MLA to see if they might be interested in this type of CE course. MLA is selecting a new LMS system and would be interested in hosting but not sponsoring the content on its platform, but the new system would not be available until late fall 2016. The committee also raised the issue as to who should teach and revise the content – the Collaborative, or AAHSL members, or a joint approach. The committee reached out to the Chicago Collaborative to clarify ownership, revision and distribution issues. The Collaborative responded that they wanted to retain control over the content, the platform choice, and other elements of the course. The Scholarly Communications recommended to the AAHSL Board that the Committee continue in an advisory capacity on the content of the course and leave ownership and control over the content and other issues with the Collaborative. This recommendation was submitted to the Collaborative along with the AAHSL survey results.

Open Access Working Group – A committee member participates in the OAWG conference calls and monitors legislative actions as well as developments within public access and open access. Due to the election year, many legislative actions are not going forward to Congress. OAWG did schedule meetings with the presidential candidates to talk about their information platforms. No specific actions have been taken by AAHSL since the fall as a result of the OAWG work.

Web-based Resources – The committee is continued to look at the types of resources wanted by AAHSL members on its Website and plans to continue to link to MLA and other association resources. A survey was conducted to find out what members want on the site. The concept of a “tool kit” will be dropped. One option is to have a current trend or hot topic area at the top of the page and encourage members to submit items. Since MLA is going through a redesign of its scholarly communication resources, the committee will reach out to the MLA chair designate to identify their plans. It was suggested that links to the new public access and data sharing policies be added to the site. Recommendations for content on the AAHSL pages will be reviewed at the November 2016 meeting.

MLA Scholarly Communications Committee – Ann Gleason Whitney was appointed the AAHSL liaison to the MLA Committee. She provided a detailed report of MLA’s activities at the May meeting and shared the URL to the NISO documents being reviewed by MLA. The committee identified a few areas where it wanted to gather more information to see if AAHSL needed to take action.

- Letter to publishers regarding the ORCID mandates issued by ICMJE members
- Signing on to AllTrials

Sage Publishing Embargo on Public Health Reports – The committee will be working with MLA on a possible response to Sage and the Association of Schools of Public Health switching to a 12-month embargo for the journal “Public Health Reports” for federal depository libraries.

Membership

Nandita Mani (UNC) and Jerry Perry (Univ. Arizona) will be joining the committee in 2016-2017 and Melissa Desantis has accepted the appointment of co-chair for 2016-2017 and chair for 2017-2018.

Submitted by Patricia L. Thibodeau, Chair

Dixie Jones, Co-chair

Melissa Desantis

Donna Gibson

Ann Whitney Gleason

Karen Haus

Michael Koehn

Emily McElroy

Debbie Sibley

Joe Swanson

**AAHSL Teaching and Learning Committee (TLC) Report**  
 October 2016

**2015-2016 Summary**

This year the Teaching & Learning Committee completed the final Fast Facts flyer on Entrustable Professional Activities (EPA). It has been a pleasure working with this group. Though our in person meetings have had lively discussions about the different ideas we might pursue, I think the day to day work demands have been considerable and the work of this committee not urgent enough to support the follow through. As such, the committee is going on hiatus until the membership feels it is needed again.

Our 2015 members included:

<b>2015-2016 Membership</b>	<b>University</b>	<b>Email</b>	<b>Term</b>
Anthony Frisby*	Thomas Jefferson	<a href="mailto:Anthony.Frisby@jefferson.edu">Anthony.Frisby@jefferson.edu</a>	
Barbara Cavanaugh	University of Pennsylvania	<a href="mailto:bbc@pobox.upenn.edu">bbc@pobox.upenn.edu</a>	11/13-11/16
Fran Allegri	University of North Carolina	<a href="mailto:allegri@unc.edu">allegri@unc.edu</a>	11/13-11/16
Marianne Burke	University of Vermont	<a href="mailto:mburke@uvm.edu">mburke@uvm.edu</a>	11/13-11/16
Barbara Kern	University of Chicago	<a href="mailto:bkern@uchicago.edu">bkern@uchicago.edu</a>	11/14-11/17
Kelly Gonzalez	UT Southwestern Medical Center	<a href="mailto:Kelly.Gonzalez@UTSouthwestern.edu">Kelly.Gonzalez@UTSouthwestern.edu</a>	11/14-11/17
Michael Kronenfeld	A.T. Still University of the Health Sciences	<a href="mailto:mkronenfeld@atsu.edu">mkronenfeld@atsu.edu</a>	11/14-11/17
Janet Bangma	St. Johns, NL	<a href="mailto:Janet.Bangma@mun.ca">Janet.Bangma@mun.ca</a>	11/15-11/18
Mary Shultz	University of Nevada	<a href="mailto:mshultz@medicine.nevada.edu">mshultz@medicine.nevada.edu</a>	11/15-11/18
*Chair			
Board Liaison: Pamela Bradigan	The Ohio State University	<a href="mailto:bradigan.1@osu.edu">bradigan.1@osu.edu</a>	

Submitted to AAHSL Board by Anthony J. Frisby - Chair on October 25, 2016.