

## 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\\_aahsl\\_report\\_from\\_leadership\\_scholars\\_update.pdf](http://www.aahsl.org/assets/2016/2016_aahsl_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