

NLM/AAHSL Leadership Fellows Program

**2019-2020
Report**

Submitted by:

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HIGHLIGHTS

The past year has been both a very successful and challenging year for Leadership Fellows Program (LFP). While AAHSL and its Future Leadership Committee (FLC) continued their commitment to the recruitment and development of first-class leaders of academic health sciences libraries, COVID-19 spread across the United States and the world. The health risks of the pandemic quickly had an impact on the 2019/2020 class with the cancellation of major in-person events and the move of critical leadership content to an online platform. Despite the cancellation of the in-person versions of the Leadership Institute and Capstone, the LFP completed another successful year through careful restructuring of the content into a virtual format.

However, the uncertainties of the continued spread of COVID-19, the development of a vaccine, and the financial impact on institutions and their libraries made planning for a new 2020/2021 class difficult. The FLC in conjunction with the AAHSL Board and National Library of Medicine (NLM) decided not to recruit a new class for the coming year. There is still a strong commitment to continuing the program and the FLC and faculty are already discussing the recruitment process and curriculum for 2021/2022, restarting the program after a one-year hiatus.

This report will focus on the 2019/2020 class which was just completed, as well as activities over the next year in preparation for the 2021/2022 (19th) class.

Patricia Thibodeau continued as program director for the 2019/2020 program, working with the FLC leaders, committee members and faculty Kathryn Deiss on curriculum design. She worked closely with AAHSL staff how to handle the impact of COVID on in-person events and the costs of cancelling hotels and other plans. She and Kathryn Deiss worked very closely on converting first the Institute and then a combined Institute and Capstone event, along with the graduation, to a virtual format. She also investigated how features in Zoom could be used to enhance the learning experience.

Over the past year the chairs met with the program director monthly and scheduled other meetings with committee members as needed to oversee and coordinate committee work. In the spring of 2019, Committee members worked on further revisions to the fellows' application process that focused on the LFP's commitment to inclusivity and diversity. A subcommittee of the FLC reviewed the application and selection processes for 2019/2020 and selected fellows and mentors for the 18th class that began in November 2019. The choices for fellows and mentors were then submitted to the AAHSL Board and NLM. The FLC chairs worked closely with the program's faculty and program director in assessing the impact of the pandemic, transitioning from in-person to online curricular events for 2019/2020, and restructuring the content to reflect a rapidly changing environment.

The Leadership Fellows Program (LFP) has completed 18 years. Its long-term success is the result of the support from its sponsors—NLM and AAHSL—and the contributions of fellows, mentors, and committee and AAHSL members. Former 2018/2019 fellow Katherine (Katie) Prentice was appointed to a permanent director position at Texas Medical Center. As of December 1, 2020, 52% of the 92 Fellows have been named permanent directors since the program began. In addition, two fellows Hongjie Wang (2014/2015) and Emily Hurst, from the 2019/2020 class, have been named interim directors.

The program submitted a new contract for continued NLM funding under a noncompetitive award that partially funds the Leadership Fellows Program. The statement of work for the new contract reflects the changing nature of the program and the new structure but also provides flexibility for the future. The award has the option of succeeding years. NLM's continued support and participation in the program enable the program to remain strong and relevant as well as meet the ongoing need for strong leadership in health sciences libraries.

Program Director and General Operations

Patricia Thibodeau completed her third year as Program Director with 2019/2020 class. Working closely with the FLC chairs, she was responsible for management of the Leadership Fellows Program (LFP) and other committee responsibilities. She also coordinated curricular activities and venue plans with the AAHSL Office. The Office continued to manage meeting logistics and expenditures for fellows and other committee activities. The LFP used Basecamp to communicate with the current learning community, share documents and calendar events, and build a sense of community among fellows and mentors. Basecamp also supports the FLC's activities including the selection process for new fellows. NLM provided access to its WebEx platform for the virtual interactive learning sessions with technical support provided by Region 2 NNLM staff members.

Assessment

The transition of fellows into permanent director's position is a critical metric for evaluation of the program. As of December 1, 2020, 52% (48) of the Fellows have received permanent director appointments. This year's new appointee was a fellow in the 2018/2019 cohort. In 2019 three (3) former fellows assumed permanent director positions, see **Appendix A**.

The program tracks vacancies in leadership positions and new appointments to director positions over the year. This roster of director vacancies is maintained to augment vacancy postings on the AAHSL Web site. Over the past year (December 2019 through November 2020) there were 30 vacancies in HSL director positions. As of December 1, 2020, sixteen of those positions were filled and there were fourteen institutions with known vacancies. In addition, there is another new medical school seeking LCME accreditation. The number of vacancies over the past year corresponds with the data collected in the 2018 Director Workforce Trends study. That study predicted there would be an ongoing number of retirements among HSL directors, with an anticipated 30 to 70 more vacancies in directors' position over the next 5 to 15 years.

With the selection of the 2019/2020 class, 92 fellows and 74 different mentors will have participated in the program. Seventeen mentors have served in this role two or more times and twelve former fellows, now directors, have served as mentors. Over 50% (n=100) of all AAHSL member institutions (n=181 members) and 67% of full/regular AAHSL members have had at least one mentor or fellow on staff or have hired a fellow.

As noted in the October 2019 report, over the past ten years 23.5% of the fellow applicants have indicated a minority status since voluntary self-identification of ethnic or racial status was initiated. Unfortunately, no applicants self-identified a racial or ethnic background in the 2019/2020 applicant pool; 19 of the 20 candidates self-identified as Caucasian and one declined

to provide any designation. The lack of diversity in the applicant pool is of great concern to AAHSL and the Leadership Fellows Program. The Future Leadership Committee has continued to identify strategies for creating a more diverse applicant pool. Further revisions are being made to application for 2021/2022 to reflect the program's goals of inclusivity and creating a sense of belonging to larger learning community and leadership network. These changes are based on feedback obtained through prior conversations with NLM, experts in leadership training and library diversity, AAHSL's Committee on Diversity, Equity and Inclusion and the AAHSL Board. The FLC is developing specific strategies for inviting librarians of color and from under-represented minorities to apply for the 2021/2022 class.

After reviewing the data on diversity within health sciences libraries, it was evident that this is a broader pipeline issue for the health sciences library profession. The FLC developed a proposal for providing four leadership scholarships to librarians of color and under-represented minorities who would like to pursue leadership training early in their careers. The hope is that this will create a pool of potential applicants for the Leadership Fellows program. This scholarship has been approved by the AAHSL Board and will be implemented in 2021.

The Future Leadership Committee continues to monitor participant satisfaction with the program's activities throughout the year and implement changes as needed. A separate evaluation of the Orientation provides more immediate feedback from the fellows and mentors and identifies potential topics for later in the year. Usually there is a separate evaluation for the Institute and another one at the end of the year to assess the overall program as well as the Capstone content. Since the Leadership Institute and Capstone were combined this year those evaluations were also combined and delivered in two parts.

According to the evaluation results, the program successfully met all its objectives, all the leadership sessions and presentations were well rated, and even with the virtual format, it continued to provide relevant content and shared real-life experiences. While everyone would have preferred more in-person events, the program was able to continue to support the learning community and create a network of peers for its fellows and mentors.

The accomplishments for the 2019/2020 Leadership Fellows Program are described below.

2019/2020 Class: Year in Review

The eighteenth class completed its year on September 25, 2020, see **Appendix B**. Fellows (Marisa Conte, Emily Glenn, Emily Hurst, Gail Kouame and Erika Sevetson) and mentors (Kelly Gonzalez, Anne Seymour, Rose Bland, Rick Fought and Debra Rand) worked together in fellow/mentor pairs.

As in prior years, events were scheduled throughout the year to ensure the cohesiveness of the cohort and the flow of leadership topics and experiences. Due to the pandemic, the calendar changed several times during the year, see **Appendix C** for the final version. An orientation session was provided for mentors, see **Appendix D**, with one session held virtually due to scheduling conflicts and a second in-person session at the AAHSL annual meeting. Fellows communicated with each other and with their mentors on a regular basis throughout the year. All fellows experienced a one-week site visit at their mentor's home library, with the visit focusing on learning goals.

As in prior years the mentor scheduled opportunities for the fellows to meet with key administrators, attend important leadership meetings, participate in special events, and discuss issues with library staff. The fellows reported that they observed leadership skills in action and gained a stronger sense of the differences in organizational culture and structure in another institution. This comment represented similar comments in other fellows' reports.:

“My site visit...was brimming with meetings, visits to campus outposts, and comfortable, stimulating social gatherings. [My mentor] expertly balanced five days of events that afforded me a chance to engage with campus partners and leaders, library leaders, and regional colleagues.”

Orientation

At its Orientation meeting on November 7, 2019, in Phoenix, AZ, see **Appendix E**, the class met with program faculty: consultant Kathryn Deiss and Janice Jaguszewski, FLC chair, see **Appendix F**. Fellow and mentors discussed the results of the leadership assessment instruments and the Nexus LAB Layers of Leadership that were administered prior to the Orientation. Deiss, who has served as faculty for seventeen years, debriefed each fellow (and mentor when requested) on the MBTI and FIRO-B instrument results prior to the orientation and then provided a group debrief at the Orientation.

Deiss reviewed the “fundamental skills for effective leaders”, which serves as the framework for the content of the program. After an overview of organizational awareness and political savvy, the concepts of boundary spanning were introduced, another topic that would be a theme for the program year. The day ended with time for the fellows and mentors to work on learning plans and Deiss leading a session on the mentoring relationship.

Prior to the Orientation, fellows were asked to complete a self-assessment of leadership competencies using questions from Nexus LAB Layers of Leadership D (leading multiple departments) and E (leading the institution). Fellows completed the post-assessment at the end of the program and those results revealed that their confidence in all leadership competencies had increased over the year. The most significant increases occurred within the higher-level strategic leadership competencies.

Learning Plans

The individual fellow learning plans are designed to assist the fellow and mentor in structuring learning opportunities throughout the year, see **Appendix G**. The plans were reviewed by the program faculty to identify any common themes or topics that need to be addressed in the curriculum. In collaboration with their mentors, the fellows described two to three goals for the program year including why the goal was important, the necessary resources to accomplish the goal, a definition of success when it was achieved and the Nexus Layers of Leadership competencies or skills that the goal addressed. In another section of the plan, the fellow identified the specific leadership skills or areas of knowledge that they wanted to work on over the year. The learning plans informed the site visits to the mentors' institutions, guiding the experiences during that week as well as the determining the institutional leaders they met. Fellows shared their plans with the cohort at the beginning of the year, and fellows and mentors

were instructed to modify the goals over the year as needed. Fellows and mentors reported using the plan during monthly discussions and when planning the site visit.

Virtual learning

Monthly virtual (online) sessions were held in 2019/2020 to continue the community building started in the Orientation and to focus on specific leadership topics of interest to the fellows. The fellows and mentors worked together to identify background reading, create assignments prior to the webinar, and facilitate the session. The fellow/mentor facilitators could also invite guest speakers to cover the topic as well. This year's sessions, (curriculum timeline **Appendix C**) included: Versatile Leadership (Kathryn Deiss); Strategic Team Building (Gail Kouame, Rick Fought); Strategic Resource Allocation (Marisa Conte, Kelly Gonzalez); Leading with Innovation and Creativity (Emily Glenn, Anne Seymour); Development Work (Emily Hurst, Rose Bland); and Navigating the Organizational Structure (Erika Sevetson, Debra Rand).

The April session had been scheduled as a follow-up to the Institute. Since the Institute was cancelled and both fellows and mentors were dealing with the impact of COVID, a special session on "Leadership during a Crisis" was held. When the Medical Library Association cancelled its annual meeting, that provided another opportunity to schedule a second session in May on that topic. Kathryn Deiss led the first session and worked with mentor Anne Seymour in the second session. This demonstrated the program's commitment to be relevant and flexible when addressing fellows' learning needs.

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

Leadership Institute

The initial plan was to hold a multi-day Leadership Institute from April 1 through April 4 in Chicago, IL, a central location. As concerns about health risks and travel restrictions due to COVID grew, the revised plan was to consider moving the event to Zoom. As work began on converting the content to an online environment, it was clear while some of the topics could be delivered virtually, the personal interactions and shared experiential learning would be lost. Because scheduling lengthy online sessions would not provide an effective learning environment, it was clear that some of the content needed to be shortened or eliminated. At the time it was hoped that the risks of COVID might be eliminated by the fall Capstone event. The LFP had already contracted with a hotel for the fall Capstone and by expanding the number of days in DC it would be feasible to create an in-person experience that would combine both the Institute and Capstone content. The FLC made the decision to move the Leadership Institute to the fall to hopefully preserve the in-person aspects of the program.

However, it became clear in May that the long-term impact on libraries and their staffs, as well as universities and their budgets would be continuing throughout the summer and into the fall. Most of the fellows and mentors would still be facing travel restrictions or health risks. Many

other meetings usually held in the fall were being cancelled or moved to an online format. Again, the program and AAHSL Board assessed the risks and travel restrictions faced by the fellows, mentors and faculty and decided an in-person event was not feasible.

The FLC chairs considered options for minimizing the financial impact on AAHSL due to hotel cancellations and proposed scheduling the April 2022 Institute in DC, at the same hotel that would have been used for this year's Institute and Capstone. The negotiations with the hotel were successful and the program moved forward with an online Zoom version of the leadership events, including an online graduation. The 2021/2022 Institute will be held on April 5 through 8 in Washington, DC.

Combined Leadership Institute and Capstone

The combined Leadership Institute and Capstone events were transformed into an online version that would use the Zoom platform provided by AAHSL. Traditional Capstone presentations from NLM, ARL and AAMC were integrated with the leadership content covered in the Institute, see **Appendix H**. For example, a session on strategic thinking was scheduled to follow presentations by NLM staff that included discussions about their internal and external plans and priorities in response to their new strategic plan. AAMC and ARL speakers covered strategic priorities but also talked about working with their stakeholders and external groups and those presentations were followed by sessions that focused on communication at the executive level and power and influence. Even though four days had been previously scheduled for the Capstone, there still was not enough time to cover all the content and presentations. Difficult decisions were made about shortening some content, eliminating a few topics and some of the presentations usually made during the Capstone. Two additional time slots were scheduled on other days to ensure the essential content was still covered. Another date and evening time slot was found for the virtual graduation.

Eight of the Zoom sessions were held on four (4) consecutive days from September 8 through 11, with two remaining sessions on Sept. 21 (information policy and AAHSL) and Sept. 25 (organizational culture and leading with an equity lens). Handouts were mailed in advance and both fellows and mentors found it helpful to have the paper copies available for taking notes. A "happy hour" was scheduled on Sept. 15 to provide some informal and social interaction time. Graduation was held via Zoom Webinar on Sept. 24 in the evening and about 49 people attended the session. Certificates of completion and the traditional gift of a class photo were mailed in advance.

As expected many of the leadership topics and discussions referred to the challenges of the current environment. Discussions often focused on positive leadership behaviors observed during COVID as well as how communication, managing change, and using power and influence were important during these times. Mentor prepared case-studies provided real-world leadership situations and experiences, and these were a highlight of the program for the fellows. One session focused on "respiring" the organization: rebuilding commitment during turbulent times. The diversity session was furthered broadened to focus on the role of the leader in social equity issues that would be a focus of concern for most institutions going into the future.

In preparation for the September curriculum, the program director worked very closely with Kathryn Deiss, program faculty, on the changes needed to deliver the topics and Capstone presentations in a cohesive and effective manner on the Zoom platform. Practice sessions with Zoom allowed them to experiment with breakout rooms and other features.

The Zoom breakout rooms were a great success and were used for discussions of the case studies and for other leadership topics. The program director worked on the assignments for the breakout rooms to ensure all the fellows got to work with each other, as well as interact with every mentor. The plus-delta comments were very positive about how well the breakout rooms supported discussions and interactions among the fellows and mentors.

The mock interviews were also done through Zoom using breakout rooms for the individual interviews and feedback sessions. Mentors used the standardized interview questions and feedback form developed by the program. As in the past, fellows reported that they learned about the types of higher-level questions that are asked during a director's interview and they received tips for strengthening their interview skills. It was also good practice for the increasing use of virtual interviews for vacant positions.

At the end of each session participants were asked to provide feedback on what worked well and what needed improvement (plus/delta exercise). Those comments were recorded and will be reviewed for future planning and modifications.

Traditionally the final evaluation of the entire program is combined with an assessment of the Capstone. Because of the combined Institution/Capstone format the follow-up evaluations at the end of the year had to cover both of those components as well as the program evaluation. This year the evaluation was broken up into two parts: Part I covered the content from the sessions held Sept. 8 through Sept. 11 as well as questions about the effectiveness of using the online (Zoom) platform, see **Appendix I**; and Part II covered the sessions on Sept. 21 and Sept. 25 as well the overall content and structure of the year-long program, see **Appendix J**. The data and comments from both evaluations will be used in planning the 2021/2022 program.

Goals FY 2020/2021

While the next fellows class 2020/2021 was placed on hiatus for the year, the Future Leadership Committee (FLC) will continue to work on these areas: maintaining the strength and diversity of the candidate pools; implementing new recruitment strategies; identifying further improvements based on the evaluations; enhancing the program content and design, including improving the effectiveness of virtual sessions and face to face time; and assessing the full range of components for leadership development within AAHSL. The FLC will continue to monitor the impact of the pandemic on the program and be prepared to continue the online delivery of the curriculum if needed. Based on feedback from the evaluations, the Leadership Institute and Capstone content will be slightly revised to ensure strong, relevant, and cohesive leadership content for 2021/2022 class. To address the diversity of the candidate pool, the FLC will be implementing a "Leadership Diversity Scholarship" program that targets early career librarians of color or from other under-represented minorities. In addition, the FLC will work on addressing the needs of new or interim directors through a "buddy system" that pairs established directors and those recently appointed, and a series of online sessions for sharing concerns and experiences as well

as learning from others. Committee members will work on revisions to the 2021/2022 fellows' application information and will be revising the brochure on recruiting a health sciences library director.

Another major activity will be the recruitment of faculty. Kathryn Deiss has announced that she wants to step back into a more advisory role with the 2021/2022 class. While Kathryn will remain involved through the Orientation of the next class, she will only serve as a consultant if needed for the other 2021/2022 curricular events. The Future Leadership Committee will be working with the AAHSL Board on the recruitment of a new faculty member.

Appendix A

Appointments of Fellows in NLM/AAHSL Leadership Fellows Program to Director Positions as of 2019-2020

2002-2003 class

Judy Consales

Associate University Librarian for Sciences, Director, Louise M. Darling Biomedical Library

NN/LM Pacific Southwest Region

University of California, Los Angeles

(earlier appointments Director; Associate University Librarian for Life and Health Sciences)

Mentor: Carol G. Jenkins

Charles J. Greenberg

Director, Health Sciences Library, School of Osteopathic Medicine

Rowan University, Stratford, NJ

(earlier appointments: Founding Library Director, Wenzhou-Kean University Library)

Mentor: J. Michael Homan

Gerald (Jerry) J. Perry

Director, Arizona Health Sciences Library

University of Arizona

(earlier appointments: Deputy Director; Director, U Colorado)

Mentor: Nancy K. Roderer

Linda J. Walton

Associate University Librarian and Director, Hardin Library for the Health Sciences

University of Iowa

Mentor: Wayne J. Peay

2003-2004 class

Nancy J. Allee

Director, Taubman Health Sciences Library and HS:STEM

University of Michigan

(earlier appointments: Deputy Director, Health Sciences Libraries, University of Michigan)

Mentor: T. Scott Plutchak

Gabriel (Gabe) R. Rios

Director, Ruth Lilly Medical Library
Indiana University School of Medicine

(earlier appointments: Associate Director of Public Services, Briscoe Library, University of Texas Health Science Center at San Antonio; Deputy Director, Lister Hill Library of the Health Sciences, Univ. of Alabama Birmingham)

Mentor: Karen A. Butter

2004-2005 class

Judy Burnham

Director, Biomedical Library
University of South Alabama

(earlier appointments: Associate Director; Interim Director)

Mentor: Brett Kirkpatrick

Beth Layton

Director, Oliver Ocasek Regional Information Center &
the Northeast Cooperative Regional Library Depository
Northeast Ohio Medical University

(earlier appointments: Interim Director, Health Science Center Libraries, University of Florida; ; Assoc. Director NNLM, Greater Midwest Region, Univ. Illinois-Chicago)

Mentor: William Garrity

Jett McCann

Director, Dahlgren Memorial Library, Associate Dean for Knowledge Management
Georgetown University Medical Center

Mentor: Patricia Thibodeau

2005-2006 class

Teresa L. Knott

Director, Tompkins-McCaw Library for the Health Sciences,
Associate University Librarian, VCU Libraries
Virginia Commonwealth University

Mentor: Karen L. Brewer

2006-2007 class

Nadine Dexter

Director, Harriet F. Ginsburg Health Sciences Library
University of Central Florida College of Medicine

Mentor: Holly Shipp Buchanan

Anne Seymour

Director, Welch Medical Library
Johns Hopkins University

Mentor: Elizabeth Eaton

Christopher (Chris) J. Shaffer

University Librarian, Health Sciences Library
University of California San Francisco

(earlier appointments: University Librarian, Oregon Health & Science University)

Mentor: Paul Schoening

2007-2008 class

Colleen Cuddy

Director Research and Instruction, Lane Medical Library, Stanford University
(earlier appointments: Associate Curator/Deputy Director; Interim Director, New York University School of Medicine; Director, Samuel J. Wood Library & C. V. Starr Biomedical Information Center Weill Cornell Medical College)

Mentor: Judith Robinson Mercer

Heidi Heilemann

Associate Dean for Knowledge Management, Director
Lane Medical Library & Knowledge Management Center
Information Resources & Technology (IRT)
Stanford University Medical Center

Mentor: Nancy Roderer

Mary Piorun

Director, Lamar Soutter Library (2017), University of Massachusetts Medical School
(earlier appointments: Director of NNLM New England Region and Associate Director, Community, Technology, and Global Relations, Lamar Soutter Library)

Mentor: Patricia L. Thibodeau

Neville Prendergast

Director, Rudolph Matas Library of the Health Sciences
Tulane University

Mentor: Carol G. Jenkins

2008-2009 class

Laura K. Cousineau

Director of Library Services, American University of Antigua College of Medicine
(earlier appointments: Director, Biomedical Libraries, Dartmouth College Libraries)

Mentor: Gail Yokote

Melissa L. Just

Dean, University Library, University of Saskatchewan
(earlier appointments: Director, Biomedical Library, University of California, San Diego; Associate University Librarian for Research and Instructional Services, Rutgers University Libraries)

Mentor: Cristina A. Pope

Sandra I. Martin

Director, Shiffman Medical Library
Wayne State University

Mentor: Gary Freiburger

2009-2010 class

Irma Quiñones

Health Sciences Library, University of Memphis
(earlier appointments: Director, Conrado F. Asenjo Library, Medical Sciences Campus University of Puerto Rico)

Mentor: Judith S. Cohn

Debra C. Rand

Corporate Director of Libraries
Hofstra Northwell School of Medicine
Northwell Health, Hofstra University

Mentor: Laurie L. Thompson

2010-2011 class

Tania P. Bardyn

Associate Dean of University Libraries
Director, Health Sciences Library
Director, NN/LM Pacific Northwest Region
University of Washington

Mentor: Julia F. Sollenberger

Keith Cogdill

Director, Division of Library Services
National Institutes of Health

Mentor: Cynthia L. Henderson

Kelly Gonzales

Director, Medical Center Library
University of Texas Southwestern Medical School

Mentor: Barbara Epstein

Deborah Sibley

Exec. Director, HAM-TMC Libraries, Houston
(earlier appointments: Director of Libraries, LSU Health, New Orleans)

Mentor: Brett Kirkpatrick

2011-2012 class

Martha F. Earl

Director, Preston Medical Library
University of Tennessee Graduate School of Medicine, Knoxville

Mentor: Connie Poole

Shannon D. Jones

Library Director
Medical University of South Carolina

Mentor: R. Kenny Marone

Jennifer McKinnell

Director, Health Sciences Library
McMaster University

Mentor: Cynthia Robinson

Jeffrey D. Williams
Director, Health Sciences Libraries
New York University
Mentor: A. James Bothmer

2012-2013 class

Donna R. Berryman
Head Health Sciences Library Services, University of Buffalo
(earlier appointments: Director, Medical Center Libraries and Technologies (2017)
University of Rochester Medical Center
Mentor: Paul A. Schoening

Rose Bland
Director, Shimberg Library
University of South Florida
Mentor: Kathryn Carpenter

Melissa DeSantis
Director, Health Sciences Library
University of Colorado Anschutz Medical Campus
(earlier appointments: Interim Director, Univ. of Colorado Health Sciences Library)
Mentor: Neil Rambo

John Gallagher
Director, Cushing Medical Library
Yale University School of Medicine
(earlier appointments: Interim Director, Cushing Medical Library)
Mentor: Gretchen Arnold

2014-2015 class

Rikke Ogawa
Director, Louise M. Darling Biomedical Library
University of California Los Angeles
Mentor: Jane Blumenthal

Kelly Thormodson

Associate Dean of Library and Information Services, Library Director, Harrell Health Sciences Library

Penn State College of Medicine

(earlier appointments: Director, Harley E. French Library of the Health Sciences 2017-2019 The University of North Dakota School of Medicine & Health Sciences)

Mentor: Kerry A. O'Rourke

Megan von Isenburg

Director, Medical Center Library and Archives

Duke University

Mentor: Marianne D. Burke

Matthew Wilcox

Director, Edward and Barbara Netter Library, Quinnipiac University

Mentor: Leslie C. Schick

2015-2016 class

Rick L. Fought

Assoc. Professor & Director, Health Sciences Library, University of Tennessee Health Sciences Center

Mentor: Andrea Twiss-Brooks

Stephanie Kerns, MLS

Director, Biomedical Libraries, Dartmouth University, NH

Mentor: Julia F. Sollenberger,

J. Dale Prince, MA, MLS, AHIP

Director of Libraries at Louisiana State University Health Sciences Center in New Orleans, LA (2018)

Mentor: Anthony Frisby, PhD

2016-2017 class

Elizabeth Ketterman

Director, Laupus Health Sciences Library, East Carolina University (2017)

Mentor: MJ Tooley,

William (Will) Olmstadt

Executive Director, Health Sciences Library, LSU Health Shreveport

Mentor: Michael (Mike) Kronenfeld

Melissa Rethlefsen

Executive Director, Health Sciences Library and Informatics Center

University of New Mexico Health Sciences Center

(earlier promotion: Fackler Director of the Health Science Center Libraries and Associate Dean of the UF George A. Smathers Libraries, University of Florida)

Mentor: Judith (Judy) Cohn

2017-2018 class

Amy Allison

Associate Dean for Library Services and Library Director

Geisinger Commonwealth School of Medicine, Scranton PA

Mentor: Cynthia Robinson

Philip Walker

Director, Annette & Irwin Eskind Biomedical Library

Vanderbilt University, Nashville, TN

Mentor: Teresa L. Knott

2018-2019 class

Mellanye Lackey, MSI, AHIP

HSL Director

University of Nevada, Las Vegas

Mentor: Chris Shaffer

Katherine (Katie) Prentice

Executive Director, The TMC Library

Texas Medical Center, Houston, TX

Mentor: Ellen Nordre Sayed

Appendix B

NLM/AAHSL Leadership Fellows Program

Fellows / Mentors Roster 2019/2020

Marisa L. Conte, MLIS, AHIP, Associate Director, Research and Informatics,
Taubman Health Sciences Library, University of Michigan, Ann Arbor, MI.

Mentor: Kelly R. Gonzalez, MSIS, MBA, Assistant Vice President for Library
Services, Health Sciences Digital Library and Learning Center, UT Southwestern
Medical Center, Dallas, TX.

Emily Jill Glenn, MSLS, Associate Director, Education & Research Services, McGoogan
Library of Medicine, University of Nebraska Medical Center, Omaha, NE.

Mentor: Anne K. Seymour, MSIS, Director, Welch Medical Library, Johns Hopkins
University & Medicine, Baltimore, MD.

Emily J. Hurst, MSLS, AHIP, Interim Director, VCU Libraries, Tompkins-McCaw Library
for the Health Sciences, Virginia Commonwealth University, Richmond, VA.

Mentor: Rose L. Bland, MA, MPA, AHIP, Director, Shimberg Health Sciences
Library, University of South Florida, Tampa, FL.

Gail M. Kouame, MLIS, Assistant Director for Research & Education Services, Robert
B. Greenblatt, MD Library, Augusta University, Augusta, GA.

Mentor: Rick L. Fought, EdD, MLIS, AHIP, Assistant Vice Chancellor of Health
Sciences Library, University of Tennessee Health Science Center, Memphis, TN

Erika L. Sevetson, MS, Director of Academic Engagement for Health, Biomedical and
Physical Sciences, Brown University Library, Providence, RI.

Mentor: Debra Rand, MS, AHIP, Associate Dean for Library Services, Donald and
Barbara Zucker School of Medicine at Hofstra/Northwell and Corporate Director of
Libraries for Northwell Health, Hempstead, NY.

Appendix C

NLM/AAHSL Leadership Fellows Program 2019-2020 Calendar REVISED to Reflect Move to Virtual Format due to COVID-19 Pandemic

November 6, 2019	Mentor orientation, Phoenix AZ, 4 – 5:30 p.m. Kimpton Hotel Phoenix, Rangoli Boardroom Mentor/fellow dinner 6:30/7
November 7, 2019	LFP Orientation, Phoenix, AZ -- Kathryn Deiss Kimpton Hotel Phoenix, Calavera Junior Boardroom
November 8, 2019	AAHSL Annual meeting and Educational Program Dreamcatcher Ballroom Evening reception Phoenix, AZ, Biomedical Campus
November 9-12, 2019	AAMC Annual Meeting, Phoenix, AZ
December 6, 2019	Complete and post learning plans
December 2019	Fellows/Mentors finalize site visit schedules
January – March 31, 2020	Site visits
January – August 2020	<i>Virtual interactive sessions – 3-4:30 ET</i> <i>January 13</i> – Versatile Leadership -- Kathryn Deiss <i>February 10</i> – Strategic Team Building – Gail Kouame, Rick Fought <i>March 9</i> – Strategic Resource Allocation – Marisa Conte, Kelly Gonzalez <i>April 20</i> – Leadership during a Crisis I – Kathryn Deiss <i>May 18</i> – Leadership during a Crisis II – Kathryn Deiss, Anne Seymour <i>June 8</i> – Leading with Innovation and Creativity – Emily Glenn, Anne Seymour <i>July 13</i> – Development Work – Emily Hurst, Rose Bland <i>August 10</i> – Navigating the Organizational Structure – Erika Severson, Debbie Rand
March 31, 2020	Deadline for completion of site visits
Sept. 8-11, 2020	Leadership Institute/Capstone (Zoom)
Sept. 21, 25	Sept. 15 Group happy hour 7 p.m. (Zoom) Sept. 24 Graduation, 6:30-8:00 p.m. (Zoom)

Appendix D

NLM/AAHSL LFP 2019 MENTORS ORIENTATION MEETING

Wednesday Nov. 6, 4-5:30 p.m., Rangoli Board Room, 3rd floor
Kimpton Hotel Palomar, Phoenix, AZ

Participants: 2019/2020 Mentors: Rose Bland, Rick Fought, Kelly Gonzalez, Debra Rand, Anne Seymour

Committee Leadership: Heidi Heilemann – current chair, Janice Jaguszewski – incoming chair, Paul Schoening – past chair, Board liaison Terrie Wheeler, incoming chair-designate, Pat Thibodeau, program director

LFP faculty: Kathryn Deiss

Purpose: Introduce mentors to the 2019/2020 program and their role and participation in the curriculum. Informally share information and advice to help mentors succeed in their roles.

Welcome to 2019/2020 Program	Janice
Building a successful mentoring relationship	Kathryn
Resource: Seven Keys to Successful Mentoring	
Building relationships in the Program – your fellow, the cohort	Janice
Your role in the LFP curriculum	Pat
Institute, Capstone, Virtual online sessions	
Planning the Site Visit	
Setting the learning goals	Pat
Impact of being a mentor on you & your staff, your fellow's library	Heidi
Supporting fellows (all graduates) into the future	Heidi
Support for mentors during the year	Pat
Your questions/issues	ALL

Appendix E

NLM/AAHSL Leadership Fellows Program 2019

Kimpton Hotel Palomar Phoenix, Phoenix, AZ, Calavera Jr. Ballroom 3rd floor

November 7, 2019 8:00 am- 5:00 pm

Orientation Agenda

Consultant: Kathryn J. Deiss Program Director: Pat Thibodeau
Future Leadership Committee Leadership: Chair: Janice Jaguszewski

- 8:00 a.m. Continental breakfast available – please arrive before 8:30 to get breakfast
- 8:30 a.m. **Program overview and introductions**
Ground Rules for Discussions
Facilitated Discussion
- How do we want to shape this program experience to meet our unique individual and group needs? How will we contribute to the learning?
- 9:30 a.m. **Putting leadership in a personal context** -- Debrief of FIRO-B and MBTI
- 10:30 a.m. Break
- 10:45 a.m. **Fundamental skills for effective leaders**
NEXUS Layers of Leadership Competencies
- Noon *Lunch with the AAHSL Board* -- Mural II 3rd floor
- 1:00 p.m. Organizational Awareness and Political Savvy as Competencies
- 1:30 p.m. **Introduction to Boundary Spanning Leadership and Boundary Explorer Tool**
Group exercise: Applying Boundary Spanning Leadership Concepts -- 15 to 20 minutes -- Analyze examples in your own libraries and organizations
- 3:00 p.m. *Break*
- 3:15 p.m. **Drafting your Learning Plan**
- Creating your plan
 - One-on-one time with mentors
- 4:15 p.m. **Mentoring Relationship/Helping Relationship**
- 4:45 p.m. **Next Steps / Group Photo**
- 5:00 p.m. Adjournment

Appendix F
NLM/AAHSL Leadership Fellows Program
Faculty and Staff 2019/2020

Consultants:

Kathryn Deiss, Consultant

Email: deissk@gmail.com

Mark Puente, DEI Consultant

Email: mpuente@mapuenteassoc.com

AAHSL:

Janice Jaguszewski, 2019/2020 Chair, Future Leadership Committee
Director and Associate University Librarian for the Health Sciences, Bio-medical Library,
University of Minnesota

Email: j-jagu@umn.edu

Patricia (Pat) Thibodeau, Leadership Program Director, AAHSL

Email: plthibodeau@gmail.com

Future Leadership Committee (leaders/advisors)

Heidi Heilemann, Past Chair, Future Leadership Committee

Associate Dean for Knowledge Management, Director of Lane Medical Library &
Knowledge Management Center, Stanford University Medical Center

Email: heidih@stanford.edu

Terrie Wheeler, AMLS, Chair-designate, Future Leadership Committee

Director, Samuel J. Wood Library and C.V. Starr Biomedical Information Center,
Weill Cornell Medicine, New York, NY.

Email: tew2004@med.cornell.edu

APPENDIX G

FELLOW/MENTOR LEARNING PLANS

The Learning Plan establishes goals that guide the fellows pursue over the program year, especially when working with their mentor but also on their own. The goals should reflect the objectives and identified outcomes of the Leadership Fellows program as well as areas of personal growth and interest of the fellow.

Program Goals and Objectives

The NLM/AAHSL Leadership Fellows Program provides selected fellows with a transformative year-long series of learning events, experiences, and relationships to equip them to assume directorships of academic health sciences libraries.

Fellows in NLM/AAHS Leadership Fellows Program will:

- Explore leadership through a variety of lenses and program components
- Learn how to lead across organizational, institutional, and geographic boundaries
- Acquire a greater understanding of the contemporary role of health sciences library directors and observe an organization different than their own
- Develop skills in thinking strategically
- Gain greater personal awareness and leadership confidence
- Develop and be able to articulate a point of view about the future of health sciences libraries and the leadership these institutions require

The Program is designed to:

- Introduce fellows to leadership theory and practical tools for implementing change at organizational and professional levels;
- Introduce fellows to critical issues facing academic health sciences libraries;
- Develop meaningful professional relationships between fellows and mentors that give fellows access to career guidance and support;
- Expose fellows to another academic health sciences library and its institutional leadership under the guidance of their mentors;
- Examine career development and provide models of directors to fellows;
- Create a cohort of leaders who will draw upon each other for support throughout their careers;
- Promote diversity in the leadership of the profession;
- Offer recognition to emerging leaders and enhance the competitive standing of fellows as they pursue director positions.

Learning Goal 1a

I would like to learn more about:

Institutional culture and organizational politics within our larger library system
Institutional Culture and Organizational Politics

Layer of Leadership E – Leading the Organization – Lead and strengthen organizational culture. Strategically network and partner with peers and other organizations; advocate for one’s cultural institution; think about, act upon, influence strategic change

This learning goal is important to me because:

I have had limited exposure to our larger library system, and with a pending realignment, I recognize that my lack of knowledge, positive relationships, etc could make it difficult for me to effectively advocate for our library (THL) and my team, remove barriers, and ensure we have the resources and autonomy needed to be successful in our work. I also feel that THL and my team have a lot of potential for leadership and to have our great work recognized as a model but that I’m not properly positioned to do that at this time.

My definition of success is:

I will be able to identify elements of organizational culture or politics that are potential problems or threats, and figure out how to address them proactively and constructively

I will be able to identify elements of organizational culture or politics that present opportunities and figure out how to approach them strategically and inclusively

In order to accomplish this goal, I will need:

- More exposure to library leadership in both social and strategic contexts [KG]
- Better strategic communication skills (see goal 1b) [MC]
- Discussions with/feedback from my mentor (and others) about my observations, threats and opportunities I’m identifying. [KG]
- Advice on how to identify other issues, opportunities, points of interest, etc (personal experience? Case studies?) [MC, KG]
- Honest and critical feedback about my observations and approaches to addressing problems, pursuing opportunities, etc. [KG]

Learning Goal 1b

I would like to learn more about:

Strategic and effective communication – this is closely linked with Goal 1a
Institutional Culture and Organizational Politics

Layer of Leadership E – Leading the Organization – Lead and strengthen organizational culture. Strategically network and partner with peers and other organizations; advocate for one’s cultural institution; think about, act upon, influence strategic change

This learning goal is important to me because:

I consider myself to generally be a very good communicator but my strengths lie in good listening, directness and clarity. I don’t think I’m good at strategic communications – eg recognizing when it’s better to speak up in the moment or to wait for another time or opportunity that would be more effective in delivering a message.

My definition of success is:

Being able to identify the best time/place/audience

Being able to identify when it’s better to set something up for the future, or build stepping stones towards a bigger or more important conversation

In order to accomplish this goal, I will need:

Examples of good strategic communication – personal experience, case studies? [KG, MC]

Feedback on my approach or experiences [KG]

Learning Goal 2

I would like to learn more about:

The business/operational side of leading a complex organization

Institutional Culture and Organizational Politics

Layer of Leadership E – Leading the Organization – Strategically network and partner with peers and other organizations; think about, act upon, influence strategic change

This learning goal is important to me because:

I have no experience with this at all. I’m specifically interested in learning about the business side of things: budget/resource planning, human resources/personnel considerations that may not be apparent at my current level within my organization, meaningful and inclusive strategic planning, meaningful initiatives to increase diversity, equity, inclusion, accessibility

My definition of success is:

Being able to demonstrate an understanding of budget and planning processes

Being able to have conversations with my dean abt these issues based on my knowledge

Implementing what I’m learning about meaningful strategic planning into my work

In order to accomplish this goal, I will need:

Learning resources: recommendations for reading materials, webinars, case studies? [MC, KG]

Focusing on budget process, HR planning/personnel decisions, strategic planning during at least part of my site visit [KG]

Learning Goal 3

I could like to learn more about:

Planning for the next steps in my career. Specifically: how do you assess an institution's culture and possibilities within the frame of a recruitment to understand if you're a good fit with a leadership opportunity?

Institutional Culture and Organizational Politics

Layer of Leadership E – Leading the Organization – Innovative leadership; think about, act upon, influence strategic change

This learning goal is important to me because:

I haven't interviewed for a job in well over a decade, and never at this level. I don't know what to look for in a job posting, phone interview, campus visit, research, etc that might be a "red flag" abt potential problems, what questions to ask to determine what I'd need to know to succeed as a leader in an organization, etc.

My definition of success is:

I will be able to make "evidence-based" decision about job postings and will have a better framework for and more confidence going into interviews

In order to accomplish this goal, I will need:

Learning more about what to look for when interviewing for leadership positions [KG]

Learning more about what can appropriately be negotiated when considering whether to accept a position [KG]

Stories/anecdotes/case studies – especially about what's gone wrong for others or experiences they've appreciated in retrospect [MC, KG]

Mock applications for job postings? [MC]

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

How do your behavioral and thinking preferences help you lead?

Looking at your Leadership Report, identify two to three things you would like to learn more about, create actions around, or actively reflect on (as in journaling, for instance):

I didn't feel like the suggested action plan in the leadership report was at all relevant, so I've come up with a few other ideas instead:

1. Develop more strategic skills around managing change vis-à-vis organizational culture: I've got good change management skills and am able to lead through change while maintaining a culture of optimism, continuing to both innovate and maintain core services, etc. But my report is right on about a key challenge: "you may not do the political maneuvering necessary to influence outcomes" – I'd like to reflect on how to get

better at this. (This also aligns with my goals to understand organizational culture/politics and communicate strategically).

2. I highly value competence and may tend to be reluctant to trust people if their competence isn't evident to me. I'd like to reflect on how I can be better at trusting and also be more creative or open to identifying potential rather than having competence as my default.

3. I tend not to have too much patience for what to me seems to be mundane details* but to others is foundational to their understanding and perhaps motivation for doing something or engaging in something. This actually speaks to a larger issue – I find it really challenging to engage with things I don't care about, which may make it difficult for me to see interdependencies (in addition to the project above). I'm not sure what the reflection opportunity here will look like but I think spending some time figuring out strategies for dealing with this as a preference would be helpful. *Perhaps related – assessment is a black box for me as I feel pretty confident I know when work is done in an area and when it's been successful (and doing assessment is not particularly interesting to me). While that's fine for some of my project work (I think), I recognize it as a weakness when structuring something for a team.

Name: Emily Glenn

Date: December 2, 2019

Learning Goal 1

I would like to learn more about:

Developing library resources to support the global health research initiatives of my institution.

Layers of Leadership

LAYER E: Leading the Organization

KEY ROLE: Envision and shape broader culture, organization and strategy

This learning goal is important to me because:

I have a stake in the global health learning community due to some work experience as a medical librarian in Rwanda and Ethiopia. I am invested in seeing US librarians contribute to bridging the information divide between well-resourced countries and developing countries.

Academic medical librarians at UNMC can leverage technologies and partnerships to extend instruction abilities and access to information resources. A instruction and outreach parnters, we are positioned to identify opportunities to serve various groups. UNMC can deepen its position as a partner organization and can support preparedness of researchers and trainees to collaborate across borders.

My definition of success is:

I will be able to identify elements of culture and politics that affect the library, and suggest possible action steps in the university context (based on our case studies and the venues I am I will be able to identify similar issues at my home institution that we can talk about in confidence, and be able to discuss differences and similarities.

- Articulate services to support global health
- Contribute to meaningful shift in cultural humility within the library (ie not making a couple of international students come tell us about their home libraries)
- Identify new opportunities to support global health (biocontainment research, Davis Center)

In order to accomplish this goal, I will need:

Mentor: To provide fellow with background information on the environment at my institution and at large research-focused academic medical centers.

Both: To identify issues (whether actual or identified in readings) that we can talk through together as case-studies.

Fellow: To be involved in meetings with partner organizations or participate in consultation with stakeholders at department or center level.

Learning Goal 2

I would like to learn more about:

Developing a teaching and instruction partnership for Special Collections and Archives and Education and Research Services. This pertains to preparing staff in both departments to:

- Navigate working together in curriculum-based education (or not) and staff and orientation,
- Meet curriculum requirements using archives and special collections materials,
- Develop teaching and instruction skills to support learning objectives and modalities
- Coordinate assessment and overall impact of instruction
- Move toward a common culture within the library

Layers of Leadership

LAYER C: Leading the Department

KEY ROLE: Manage complex strategies and projects through cross-functional teams

This learning goal is important to me because:

The Special Collections and Archives unit of the library aims to incorporate materials into the classroom space. There is some culture of instruction that is evolving (such as how we consider instructional design). The sticking points seem to be:

- How can the Education and Research Services team support instructional design for instruction with Special Collections and Archives materials?
- Considering the donor-heavy museum-like space, could the push into the classroom be perceived as being a bit too conveniently timed?
- Whether Special Collections and Archives fit within college curricula (or perhaps instead in pipeline, event programming, and non-college curricula)?

My definition of success is:

Understand the opportunities and limitations for incorporating Special Collections and Archives learning experiences into curriculum-based courses.

In order to accomplish this goal, I will need:

Mentor: To provide fellow with background information on archives and special collections-related education priorities. To provide support and context for moving toward a common culture by bringing two cultures together.

Both: To discuss issues pertaining to culture of having and supporting a museum (and subsequently donors) vs. supporting academic efforts for learners. How to maximize the attention from both (or double dip) so that the institutional profile is lifted and use of materials is increased.

Fellow: To review information literacy-related education strategies and special collections outreach and education strategies. To participate in meetings with director and department leaders to understand nuances of incorporating special collections into information literacy-outreach work, or in crafting new education opportunities.

Learning Goal 3

I would like to learn more about:

Incorporating principles of inclusion and integration into the library spaces and services.

- 1) Develop, promote, and instill space and service policies that reflect values in language and accessibility
- 2) Provide leadership in the acquisition of critical librarianship principles for faculty librarians.

Layers of Leadership

LAYER D Leading Multiple Departments

KEY ROLE: Connect with broader internal and external systems

This learning goal is important to me because:

I recognize that the library is represented in various diversity and inclusion efforts on campus. We have undergone microaggression, ally, and change management training. We are poised to continue to evolve in the way we present ourselves as an inclusive space and service provider. This is also important to me because it is part of my portfolio of strategic goals within the library.

My definition of success is:

- 1) Completion and adoption of space and service policies that reflect values in language and accessibility
- 2) Witness library faculty include critical information literacy principles into instruction
- 3) Incorporate critical pedagogy statement into library education/teaching statement (to be created)

In order to accomplish this goal, I will need:

Mentor: To provide fellow with grounding on the political savviness required to disrupt the internal and external-facing status quo.

Both: To discuss issues pertaining to culture of having and supporting a museum (and subsequently donors) vs. supporting academic efforts for learners. How to maximize the attention from both (or double dip) so that the institutional profile is lifted and use of materials is increased.

Fellow: To participate in meetings with department leaders to understand application of critical information literacy. To interview library informationists and department leaders about their approaches to diversity and inclusion.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

1. Incorporate reflection focused on leadership. The goals of this reflection will be to meditate on the following questions:

When do I pause and think of how to extend my energy?

What is my method for finding balance?

How will I plan to retain passion throughout the next year (a time of increased demand at work)?

Name: Emily Glenn

How can I stimulate an appropriate amount of iteration in the work I do?

I want to accomplish this by drafting small case studies of things I encounter and then discussing them with my mentor.

LAYER A: Leading Self

KEY ROLE: Pursue knowledge, assignments and responsibilities that expand leadership capabilities

2. Consciously know/learn how to activate the leadership part of me that represents the vision as well as the concrete actions. This is a priority because it will help me to be more aware of inspiring other members of my team and guiding them away from distraction and toward action.

Insights from my discussion with Kathleen:

-I have to show people that I trust them.

-My goals may be too broad for people who have a need for details.

-I can get eaten up by trying to multitask because I do have interest in many areas.

My active mind may present what looks like a ricochet of ideas to those who need things to be more singular. Lots of people can't sa

Name: Emily Hurst Date: 12/03/2019

Learning Goal 1

I would like to learn more about:

Managing change as a library leader during times of transition.

Layer of Leadership E – Leading the Organization – Lead and strengthen organizational culture. Think about, act upon, and influence strategic change.

This learning goal is important to me because:

Change impacts every aspect of the library including space, staffing, services, and relationships with external groups. Current trends suggest change based on potentially shrinking budgets with potential involvement in library space planning or development.

My definition of success is:

I will increase my ability to vision, prepare for, and impact library change. I will be able to identify when change is necessary or desired and develop an awareness of how change impacts structure.

In order to accomplish this goal, I will need:

Fellow/Me: Become involved with discussions/meetings or debriefed on library changes. Also review of literature on current trends impacting academic health sciences libraries. Consider discussion with library and university leaders about current trends related to change or changes on the horizon.

Mentor/Rose: Provide background and examples of large-scale library changes at their intuition. Refer fellow to useful readings related to change.

Both: Identify examples of change that have impacted or are impacting health sciences libraries and how libraries have responded to change. Review and discuss case-studies.

Learning Goal 2

I would like to learn more about:

Development and budgeting for a health sciences library.

Layer of Leadership E – Leading the Organization – Lead and strengthen organizational culture. Advocate for one's cultural institution

This learning goal is important to me because:

Shifts in funding are constant. Budget impacts the library's ability to achieve goals.

Understanding how development cultivates a community of giving that can have positive impacts on the library.

My definition of success is:

I will develop a better understanding of library budgeting models and more clearly understanding fundraising and development within academic libraries. I will feel more confident making budgetary decisions and leading discussions on budget issues as well as develop skills for cultivating potential donors.

Name: Emily Hurst

In order to accomplish this goal, I will need:

Fellow/Me: Review budget models and common budgeting scenarios. Meet with leaders in development and fundraising in an academic library.

Mentor/Rose: Share library's full budget and provide mentorship on the budget setting process. Provide access to development experts.

Both: Identify common library budget models and development methods.

Learning Goal 3

I would like to learn more about:

Ethics in leadership and the library director's role in creating an ethical workplace.

Layer of Leadership E – Leading the Organization – Lead and strengthen organizational culture. Lead organizational culture

This learning goal is important to me because:

Today's leaders are confronted with diverse issues and may be placed in situations that cause ethical dilemmas. I would like to learn more about how ethical leadership impacts the library. I would like to develop confidence in how deal with difficult or uncomfortable decisions to ensure the best outcomes for library staff, donors, and patrons while maintaining integrity.

My definition of success is:

Understand key aspects of ethical leadership and actions to take when situations become uncomfortable. Understand how bias may impact decision making process and how to be aware of personal bias to make informed and ethical decisions.

In order to accomplish this goal, I will need:

Fellow/Me: Explore personal biases and situations where ethics have come into play. Understand persona reactions to ethical dilemma and how to model ethical behavior as a manager.

Mentor/Rose: Will provide examples from personal experiences.

Both: Review literature on this topic in the library literature. Look for case studies and consider discussion with Omnibus and identify other campus sources to provide guidance, support, or counseling on this topic.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

- 1.** Power/Influence relationships. How can I be more influence? How can I identify areas of person power?
- 2.** Communicating up: Reflect on actions where communicating up did not go as planned. How can these conversations be more useful and how can I better make my case?
- 3.** Negotiating work relationships. How can I be a more effective colleague with peers, direct reports and in my work with my supervisor?

Name: Gail Kouame

Date: December 3, 2019

Learning Goal 1

I would like to learn more about:

Navigating Institutional Culture and Organizational Politics

Layer of Leadership E – Leading the Organization

- Key leadership task - Making the case for support and development of resources
 - Demonstrating the impact of resources on my organization's ability to deliver on its mission
 - Articulating tailored cases for different types of stakeholders
- Skills to perform task
 - Advocate for one's cultural institution
 - Present the value of cultural institutions to key stakeholders
 - Articulate the socio-economic impacts of the organization and the cultural sector
 - Team-building
 - Build effective teams across organizational boundaries
 - Lead and strengthen organizational culture

This learning goal is important to me because:

Academic health sciences libraries operate in a complex, multi-faceted environment where knowledge and understanding of the culture and politics is key to successfully negotiate for resources. It is important to know the priorities of the institution and the organization as this drives decision-making. I would like to gain greater understanding of where health sciences libraries fit into their greater institutions and organizations and how they are viewed/valued. I would also like to learn more about successful negotiation tactics, especially when resources are limited.

My definition of success is:

I will be able to articulate the library's place in the organizational structure both at my own institution and in others (or know how to discover this information). I will be able to describe different types of stakeholders and state ways to negotiate successfully for resources based on case studies and/or venues I will visit. I will be able to discuss these processes in confidence and talk about differences and similarities.

In order to accomplish this goal, I will need:

Mentor: To provide my fellow with practical strategies to advocate for the library. Also, have my fellow meet with key stakeholders at my institution to put these strategies into context.

Both: To identify issues (whether actual or identified in readings) that we can talk through together as case studies

Fellow: To be involved in meetings with key leadership in the library, the health system, and the university, with debriefing sessions afterwards.

Learning Goal 2

I would like to learn more about:

Developing a strategic organizational mindset – thinking, acting, and influencing strategically

Layer of Leadership E – Leading the Organization

- Key leadership task – Stewarding my organization’s mission and vision
- Skills to perform task
 - Think about, act upon, and influence strategic change
 - Lead and strengthen organizational culture

This learning goal is important to me because:

Without a strong vision and strategic plan to provide a structure for its realization, an institution has no strong sense of identity or direction. The vision and strategic plan guide priorities and decision-making across the institution. They drive what to strive to accomplish and what to say no to. I would like to learn more about how organizations/institutions establish their strategic goals and frameworks, and more importantly, how those frameworks are used for planning and organizing institutional projects and processes.

My definition of success is:

I will have increased confidence about creating and implementing strategic planning and how to apply the strategic plan to the day-to-day operations of the health sciences library. Also, I will know how to adjust/adapt the strategic plan and direction of the health sciences library to meet the changing needs of the university and the library as new priorities and trends arise.

In order to accomplish this goal, I will need:

Mentor: To have my fellow meet with my team and lead a discussion on how we approach organizational culture and strategic planning.

Both: Find examples of academic health sciences libraries’ strategic plans to use as case examples and discuss the similarities and differences and how some of the content might be applied at the fellow’s home institution (if they aren’t already)

Fellow: To see examples of academic health sciences libraries’ strategic plans and explore how they are developed. Also to learn how the libraries’ strategic plans integrate with the strategic plans of the university as a whole. Also, to discover how the strategic plan is applied to the library’s operations

Learning Goal 3

I would like to learn more about:

Best practices for professional development as a library leader

Layer E – Leading the Organization

- Key leadership task: Exchanging important ideas for the good of the field
- Skills to perform task

Name: Gail Kouame

- Developing expertise
 - Act as a thought leader
- Lead and strengthen organizational culture

This learning goal is important to me because:

Leading others effectively requires ongoing growth and development in order to best serve your team and your organization. Taking time for reflection and reading relevant literature, participating in professional conferences and continuing education opportunities, and consulting with peer mentors are all instrumental to professional growth. Being a leader require specialized knowledge and skills along with emotional intelligence. I would like to explore developing an intentional professional development plan to best position me for a leadership role in academic health sciences libraries.

My definition of success is:

I will have a roadmap in place for professional development for the next 2-3 years that includes self-reflection, reading, selecting conferences or CE opportunities, and formalizing peer mentor relationships to help keep me on track and accountable.

In order to accomplish this goal, I will need:

Mentor: To prepare some reading materials and guidance on how to approach continued professional growth.

Both: To identify priority areas for focus for professional development. Find relevant literature/reading material, set up a schedule for regular conference calls with one another, explore possible conferences or CE opportunities, and determine a plan for accountability.

Fellow: To set aside protected time in my schedule for reflection and reading. To start a journal focused on my development as a leader and to foster self-reflection.

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

- 1.** Know and embrace my “leadership brand” (Performer – see page 10 of Leadership Report) and balance it with other leadership styles. Step back from time to time and reflect on whether a different approach or style is appropriate for making decisions or setting direction (for example, the Rationals approaches). Ask myself how I might have done things differently.
- 2.** Prepare for new Dean (see page 14 of Leadership Report) – discover how I will most effectively become ready for a leadership change and assess the new person’s bases of power and influence (see page 15 of Leadership Report). Navigate how to be an advocate for my team with a new leader.

Name: Erika Severson Date: December 10, 2019

Learning Goal 1

I would like to learn more about:

Organizational politics and structure around the relationships between academic institutions and their affiliated or owned health care systems

Layer of Leadership E – Leading the Organization

Key leadership tasks

Contribute to meta-organizations

Making the case for support and development of resources

Skills to perform tasks

Strategically network and partner with decision-makers in my organization

Advocate for the library within the organization

Think about, act upon, and influence strategic change

This learning goal is important to me because:

There are many models for a library's relationship with the academic medical center. My own institution (academic-only) is looking at stronger partnerships with our affiliated hospitals and evolution to an academic medical center, and may investigate some model of merged library services.

My definition of success is:

- To have a better understanding of how these discussions have occurred at other institutions (specifically around) financial systems and agreements, and how to define and quantify library terms of service.
- To be able to ask the right questions and advocate for appropriate staffing, service, and funding levels if/when the University Library is called to the negotiating table.

In order to accomplish this goal, I will need:

Mentor: Arrange meetings at my institution covering both academic and health system leadership to hear directly the organizational perspectives, which while primarily integrated can also be challenging.

Utilize the full resources of AAHSL to meet with library directors or otherwise obtain pros and cons of the various models for library relationships bridging the academic and clinical environments we serve.

Both: Examples of successful (and possibly problematic) relationships between academic institutions and their medical centers.

Fellow: to develop techniques for benchmarking—not just comparing numbers from peer institutions, per se, but developing a set of questions that get at the stories behind the numbers.

I.e., not just “how many staff do you have” but “what works about this structure and what do you wish you could do differently?”

Learning Goal 2

I would like to learn more about:

Strategic plan alignment with the broader organization

Layer D—Leading multiple departments

Leadership tasks:

Recognizing and communicating emerging trends and the needs and interests of external communities

Skills: Carry out internal and external environmental scanning

Developing strategies to meet changing stakeholder needs

Skills: Apply techniques and tools for tracking and understanding changing needs of stakeholder communities

Layer E—Leading the Organization

Leadership tasks:

Stewarding my organization’s mission and vision

Skills: Think about, act upon, and influence strategic change

This learning goal is important to me because:

My university has a very strong strategic plan and operational goals, and the schools we serve (the Division of Biology and Medicine and the School of Public Health) have individualized, more focused plans. The Library is matching its own strategic goals to the University’s. My staff is small, and there so many areas where we could focus our energies that we run the risk of over-extension and burnout.

My definition of success is:

To better prioritize staff projects and institutional priorities, recognizing that staff time is finite. To plan staff and library activities proactively, rather than reacting to external needs and forces as they arise.

In order to accomplish this goal, I will need:

Mentor: Reach out to contacts both internally and in the AAHSL/AAMC community to explore strategic planning documents and processes, delineating frameworks for libraries that are realistically obtainable and sustainable.

Both: Review literature on strategic and operational planning in libraries and/or complex organizations.

Fellow: To see examples of academic library operational plans that are aligned to their own (and larger institutions’) strategic plans, and to see examples of how these were successfully implemented.

Learning Goal 3

I would like to learn more about: Mentoring and developing staff.

Layer B: Leading others

Key leadership tasks:

Developing and empowering staff

Building strong, diverse teams

- Cultivating different perspectives

Skills needed:

Encourage new knowledge and ideas

Diverse talent recognition and development

Motivation of others

Effective communications

- Active observing and listening
- Coaching
- Foster dialogue

This learning goal is important to me because:

My staff represent a continuum of very early career through mid-career librarians. We have also had a lot of change within our library over the past 2 years, which is stressful to everyone although it's mostly positive change. When there's a lot of change, the tendency can be to hunker down and just try to weather the storm, which often produces low engagement and morale. I want to ensure my staff have the tools they need to develop professionally and stay in the profession, while also making being engaged in the strategic work of the library.

My definition of success is:

To work with each of my direct reports to develop a mentoring or professional development plan with and for them.

In order to accomplish this goal, I will need:

Mentor: Arrange meeting with our VP of Faculty Development to discuss a framework for mentoring various levels of staff. Reach out to AAHSL leaders who are experts in developing and mentoring high performance staffing.

Both: Discuss realistic plans based on information gathered that reflect desired career development as well as staff size and budgets.

Fellow: Examples of mentoring and professional development plans, if possible for librarians at various career levels and/or with differing goals (leadership, research support, etc.).

Learning Goal 4: Leadership Report Based on MBTI and FIRO-B

1. Focusing on inclusion behavior (page 18, bullets #1 and #3), I would like to be more deliberate about how I can keep up with the work of my staff and identify opportunities for their growth, while also trusting them to know their work. I believe that my goal #3 (mentoring/developing staff) will help with in this regard.
2. As someone with a strong aversion to micromanaging (pg 14), I may go too far in the opposite direction in my own leadership in allowing people to set their own work framework, which might be a problem for team members who benefit from a stronger structure and system of accountability. I would like to learn more about how to balance those seemingly conflicting issues to meet the needs of staff with differing styles.

Appendix H
NLM/AAHSL Leadership Fellows Program
Sept. 8 - 11, 21, 24, 25, 2020 Leadership Institute / Capstone
ZOOM Version

Sept. 8 Tuesday -- Institute/Capstone -- Zoom Introduction/Overview, NLM Presentations and Strategic Leadership	
	<i>PLEASE NOTE TIME ZONE DIFFERENCES -- CDT EDT</i>
9-10 am CDT 10-11 am EDT	Session 1: Introduction, Norms, and Overview of Institute Agenda -- Kathryn Deiss Context for Institute/Capstone Four Critical Leadership Competencies: communication, influencing for commitment, learning agility, and self-awareness Kathryn Deiss <i>What do you want to bring to this Institute/learning experience?</i> <i>Reconnecting</i> <i>REFOCUS for the Institute: On your own think about: When you think about your own leadership and your future, what do you want to work on in specific terms?</i>
10-11 CDT 11-12 EDT	Session 2: NLM Library Operations Dianne Babski, Acting Associate Director, Division of Library Operations Amanda J. Wilson, Chief, Office of Engagement and Training
11-12 pm CDT 12-1 pm EDT	Session 3: NLM Leadership Patricia Flatley Brennan, Director, NLM Jerry Sheehan, Deputy Director, NLM
12-2 pm CDT 1-3 pm EDT	LUNCH break
2-3 pm CDT 3-4 pm EDT	Session 4: Strategic Initiatives Leigh Samsel, NLM Planning and Evaluation Officer, Office of Strategic Initiatives Lisa Federer, Data Science and Open Science Librarian, Office of Strategic Initiatives

<p>3-4 pm CDT 4-5 pm EDT</p>	<p>Session 5: Strategic Thinking -- Kathryn Deiss <i>Strategic thinking core competencies and skills</i> <i>Trend identification and pattern recognition</i> <i>How do you help others think strategically?</i></p> <p><i>What have you found helpful in looking for trends and emerging issues?</i></p> <p><i>Non-library, institutional analysis -- Identify resources, trends,</i></p> <p>WHAT HAS BEEN YOUR EXPERIENCE WITH STRATEGIC PLANNING, DIFFERENCE WITH STRATEGIC THINKING, HOW TO BRING THEM TOGETHER</p> <p><i>Wrap up -- Plus/Delta</i></p>
<p>Sept. 9, Wednesday, Day TWO Institute/Capstone -- Zoom</p> <p>AAMC, ARL, Communication, Power & Influence</p>	
<p>8:30-9 am CDT 9:30-10 am EDT</p> <p>9-10 am CDT 10-11 am EDT</p> <p>10-10:15 am CDT 11-11:15 am EDT</p> <p>10:15-11:15 am CDT 11:15 am -12:15 pm EDT</p> <p>11:15 am -12:30 pm CDT 12:15-1:30 pm EDT</p> <p>12:30-2 pm CDT</p>	<p><i>Community Review</i></p> <p>Session 6: Roles and Services of Association of American Medical Colleges (Panel) Heather Sacks, Director GIR Constituent Engagement Tannaz Rasouli, Senior Director of Public Policy and Strategic Outreach Eric Weissman, Sr. Director, Faculty & Academic Society Engagement</p> <p><i>BREAK</i></p> <p>Session 7: ARL Strategic Priorities and Initiatives <i>Mary Lee Kennedy, Executive Director, Association of Research Libraries</i></p> <p>LUNCH break</p> <p>Session 8: Communicating Effectively at the Top -- Kathryn Deiss <i>Case Study 1: Communication -- Facilitator: Rose Bland</i></p>

<p>12-1 pm CDT 1-2 pm EDT</p> <p>1-1:45 pm CDT 2- 2:45 pm EDT</p> <p>1:45-2:15 pm CDT 2:45-3:15 pm EDT</p> <p>2:15-2:30 pm CDT 3:15-3:30 pm EDT</p> <p>2:30-3:30 pm CDT 3:30-4:30 pm EDT</p> <p>3:30-3:45 pm CDT 4:30-4:45 pm EDT</p>	<p><i>Case Study 4: Forging Common Ground -- Facilitator: Anne Seymour</i> BREAKOUT ROOMS</p> <p><i>Case reflection/discussion</i></p> <p>LUNCH break</p> <p>Session 11: Championing and Leading Change -- Kathryn Deiss <i>Using models to look at change dynamics</i> <i>How do you assess the need for change?</i></p> <p><i>Case Study 5: Leading Change -- Facilitator: Kelly Gonzalez</i> BREAKOUT ROOMS</p> <p><i>Case reflection/discussion</i></p> <p><i>BREAK</i></p> <p><i>Discussion of case</i> <i>How do you sustain the energy and focus required for effective change?</i></p> <p><i>Wrap up – Plus / Delta</i></p>
<p>Sept. 11 , Friday, Day FOUR Institute/Capstone -- Zoom</p> <p>Mock Interview, Negotiations for Directorships, Respiring the Organization</p>	
<p>8:30-9 am CDT 9:30-10 am EDT</p>	<p><i>Community Review</i></p>

<p>9-10:30 am CDT 10-11:30 am EDT</p>	<p>Session 12: Mock Interview <i>Preparing for mock interview 9-9:15 CDT, 10-10:15 EDT</i> <i>Conducting mock interview (45 minutes) 9:15-10:00 CDT, 10:15-11 EDT</i> BREAKOUT ROOMS <i>Feedback (30 minutes) 10-10:30 CDT, 11-11:30 EDT</i></p>
<p>10:30-10:45 am CDT 11:30-11:45 am EDT</p>	<p><i>BREAK</i></p>
<p>10:45-12 pm CDT 11:45 am -1 pm EDT</p>	<p>Session 13: Managing Negotiations for Director Positions -- Kathryn Deiss with Mentors <i>Group debrief from mock interview</i> <i>Sharing experiences in negotiating a director's position</i></p>
<p>12 -1:30 pm CDT 12:30-2 pm EDT</p>	<p>LUNCH break</p>
<p>1:30-3:45 pm CDT 2:30-4:45 pm EDT</p>	<p>Session 14: Respiring the Organization -- Kathryn Deiss <i>How do you take care of staff during change?</i> Fellow/Mentor pair discussions BREAKOUT ROOMS</p>
<p>BREAK TBD</p>	<p><i>Group debrief</i></p>
<p>3:45-4 pm CDT 4:45-5 pm EDT</p>	<p><i>Sharing your touchstones</i> BREAKOUT ROOMS <i>Group debrief</i></p>
<p>3:45-4 pm CDT 4:45-5 pm EDT</p>	<p><i>Plus delta / wrap up</i></p>
<p style="text-align: center;">Sept 21, Monday, Institute / Capstone -- ZOOM Speaker Presentations -- ARL, SPARC, AAHSL</p>	
<p>8:30-8:45 am CDT 9:30-9:45 am EDT</p>	<p><i>Brief community review</i></p>

8:45-9:30 am CDT 9:45-10:30 am EDT	Session 15: Information Policy / Legislation <i>Judy Ruttenburg Senior Director of Scholarship and Policy, ARL</i> <i>ARL Director of Information Policy -- TBA</i>
9:30-9:45 am CDT 10:30-10:45 am EDT	<i>BREAK</i>
9:45-10:30 am CDT 10:45-11:30 am EDT	Session 16: SPARC <i>Heather Joseph, SPARC Executive Director</i>
10:30-10:45 am CDT 11:30-11:45 am EDT	<i>BREAK</i>
10:45-11:30 am CDT 11:45 am-12:30 pm EDT	Session 17: Association of Academic Health Sciences Libraries (AAHSL) <i>Sandra G. Franklin, AAHSL President</i>

Sept. 24, Thursday, Graduation Celebration -- Zoom
6-7:30 CDT, 7-8:30 EDT

Sept. 25, Friday, Institute / Capstone -- Zoom
Organizational Culture, Inclusive Leadership

1-2 p.m. CDT 2-3 p.m. EDT	Session 18: Leading and Shaping Organizational Culture -- Mark Puente and Kathryn Deiss <i>What is organizational culture and how does it differ from organizational climate?</i> <i>How do you think about your organization's culture and change?</i>
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<p>2-3:45 p.m. CDT</p> <p>3-4:45 p.m. EDT</p> <p>TO BE DETERMINED THAT DAY</p> <p>3:45-4 p.m. CDT</p> <p>4:45-5 p.m. EDT</p>	<p>Handouts: Organizational Culture and Organizational Climate</p> <p>Session 19: Inclusive Leadership -- <i>Mark Puente</i> <i>Brief overview of issues facing library directors/libraries.</i> <i>Leader's role in today's environment</i> <i>Role of the leader in developing and maintaining an inclusive environment</i></p> <p>Handouts: Star Framework The Path from Exclusive Club</p> <p><i>BREAK</i></p> <p><i>Continuing discussion about creating an inclusive work environment and inclusive leadership</i></p> <p><i>Group debrief and reflection – Plus/Delta</i></p>
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Appendix I
NLM / AAHSL Leadership Fellows Program
Final Institute Capstone Evaluation 2019/2020 PART I

Most questions used a six-point rating scale with 1 being the lowest rating (Not at all helpful/useful/important) and 6 being the highest rating (Extremely helpful/useful/important). The data reported below reflect the average for the 10 responses and indicate if another scale was used for a specific question.

While the online format for the Institute/Capstone was quite successful this year, there are comments throughout the evaluations that in-person events would have been better for learning, getting to know each other, the mock interview experience, and building the community in informal as well as formal activities.

1. Role in Leadership Program: Fellows N=5; Mentors N=5; Total 10 (out of 10)

2. During the Institute we provided time to reconnect and reflect about the year and program. How helpful/valuable were these discussions to you? (4.90 of 6.00)

Selected comments:

- Given this year's environment I think this was a necessity to be able to reconnect and reflect about the year.
- Good to refresh memory about concepts presented throughout Institute. Also good to have time for reflection, since reflection, for me, is an activity that often falls by the wayside.
- Both daily debriefs and program reflection were so valuable. Helped me remember key concepts, points, and follow up actions.
- I haven't had much time for reflection this year, so it was very useful to have this.

3. Session 1: Introduction and Overview of Institute. Please rate the components of our first session Tuesday morning.

Reconnecting -- 5.20 of 6.00

Review of Critical Leadership competencies – 5.11 of 6.00

Observing/employing the competencies used by others – 4.80 of 6.00

Selected comments:

- This helped to set the tone for the week and reorient us to the program.
- Good to have "refresher" discussion about critical leadership competencies. Wish I had been more tuned in to being observant of "competencies used by others."
- Good opportunity to think about personal leadership goals.

4. Session 2: How helpful and informative was the discussion about NLM's Library Operations and its changes? (Babski, Wilson)? (4.90 of 6.00)

Selected comments:

- Appreciated learning about the management coaching they are using.

- Good to see the big picture of Library Operations at NLM and see what priority areas are. appreciated hearing that one of their principles is to expect that not everything is going to work.
- Great session, I wish there was more time to discuss topics with the presenters.
- This was the first time I had ever heard of internal NLM operations focusing on D&I. The culture discussion seemed less guarded than other times I had heard from NLM leaders. I always enjoy hearing from Dianne. It was wonderful to get to know Amanda Wilson a bit more. Her enthusiasm for outreach was really refreshing.
- perhaps more interesting to hear how/why decisions were made to restructure programs to either eliminate entirely, refocus, or integrate with other operations

5. Session 3: How helpful and informative was discussion with NLM leadership (Brennan, Sheehan)? (5.90 of 6.00)

Selected comments:

- It is so helpful for us to learn about Dr. Brennan's leadership style especially since she is leading such a big organization.
- Great presentation and discussion! So much change in a short period of time at NLM - great to get an "inside look" at how it's being managed. Appreciate Dr. Brennan's openness about her thinking and her perspectives.
- Dr. Brennan is always so full of energy and ideas - I can't help but be inspired by her vision. I really liked learning about the dynamic between Patti and Jerry -- is influencing my own thinking about my organizational structure and leadership.
- This session brought more of the responsibilities and accountabilities of NLM forward. It was informative to hear about NLM's staffing and decision making around strategic directions.

6. Session 4: How helpful and informative was the discussion about NLM's strategic initiatives (Samsel, Federer) (5.00 of 6.00)

Selected comments:

- This discussion helps us to understand NLM more so that we can better align our libraries with NLM.
- Great to see such a well thought out process and plan and to see it in the context of the greater NIH plan as well. Appreciated emphasis on need to have continuous and consistent communications about why things are being done in the context of the strategic plan.
- Provided a good understanding of how strategic decisions are made at the national level.
- I was especially interested in Lisa Federer's talk and assessing and growing the NLM workforce around data science.

7. Session 5: Strategic Thinking. Please rate how helpful these were to you.

Strategic thinking, commitment, alignment – 5.40 of 6.00

Trend identification and pattern recognition – 5.20 of 6.00

Strategies for helping others think strategically – 5.30 of 6.00

Resources for identifying trends and emerging issues – 5.20 of 6.00

General discussion – 5.00 of 6.00

Selected comments:

- Handouts were very useful. I've already shared the info from this session with my library leadership team and have found the strategies for helping others think strategically especially helpful! I also learned about your resources for identifying trends and really appreciated that part of the session. Love that I'm still learning new things at this point in my career. Thank you!
- Helped me to recognize that I need to be mindful of focusing on strategic thinking and get myself out of "operational mode." The strategic thinking discussion was very helpful in preparing for the mock interview, especially in helping me think of the questions I wanted to ask the interviewer.

8. Session 6: How helpful was the content and presentation about AAMC (Sacks, Rassouli, Weissman)? (4.67 of 6.00)

Selected comments:

- Really helpful to understand AAMC's role and how they support our colleges of medicine. I think this is a vital presentation to continue to offer. Anything I can learn that impacts my college helps me to work better with them and this has paid off already as we prepare early for our accreditation visit in 2023.
- Would have liked shorter content and more discussion time.
- This group had so much to share about advocacy and coalition building. It was great to hear from them in this smaller group setting. I learned a lot about CFAS and government relations-- stuff I think I *should* have known in my current position, but had not sought out. I feel more informed about the AAMC's role with AMCs.
- good for mentees to learn about this if they don't already know, especially GIR and CFAS

9. Session 7: How helpful was the discussion about ARL's priorities and strategic initiatives (Kennedy)? (5.22 of 6.00)

Selected comments:

- ARL has such an impact on our academic libraries that this is helpful to understand what they are focusing on.
- Good to hear about current initiatives of ARL and how they have flexed in response to COVID-19 and racial inequities issues. ARL is a good organization to watch for trends, etc.
- Really enjoyed this session, more time to discuss the importance and role of ARL for a health sciences library would be good.

- Mary Lee Kennedy provided so much context for ARL and partner organizations. I appreciated the discussion with her and wish we had more time to ask some questions. I loved hearing from her.

10. Session 8: Communicating Effectively at the Top. Please indicate how helpful this session was to you as a leader.

Executive leadership communication – 5.00 of 6.00

Ladder of inference – 4.80 of 6.00

Case study 1: Communication (Rose Bland) – 5.50 of 6.00

General discussion – 5.30 of 6.00

Selected comments:

- Even though I've learned about the Ladder of Inference before, this session helped me to better understand it. I'm answering the case study helpfulness in terms of it helping me as the creator. This experience gave me the opportunity to learn how to write a case study and allowed me to reflect on the actual situation I experienced and gave me an opportunity to share it so others can learn from it. Really appreciated this opportunity.
- Appreciate the handouts and worksheets so I can go back and re-visit these important topics and concepts. ... Loved the case study- generated great discussion.
- Thought provoking case, great discussion in small group and full group.
- All the case studies were helpful. I like the idea of somehow incorporating mentee case studies within the total program.

11. Session 9: Influencing Others to Gain Commitment and Cooperation. Please indicate how helpful this session was to you as a leader.

Influencing Strategies – 5.10 of 6.00

Bases of power – 5.00 of 6.00

Case study 2: Power / influence (Rick Fought) – 5.60 of 6.00

Sources and uses of power – 5.20 of 6.00

General discussion – 5.60 of 6.00

Selected comments:

- Learning from other's experiences gives us a realistic view of what is possible and I appreciated Rick's experience in his case. It made me feel more empowered to continue my own efforts at my institution!
- Interesting case study! It helped demonstrate how to leverage power and influence at several levels. Handouts and worksheets are helpful - had heard some of the content before, but never hurts to get a refresher.
- This case study was so intriguing because it contained risk, reward, and redemption. I hope you consider using this case in the future.

12. Session 10: Revisiting Boundary Spanning Leadership. Please rate how helpful these were to you.

Review of boundary spanning leadership – 4.8 of 6.00

Case study 3: Managing boundaries (Debbie Rand) – 5.1 of 6.00

Case study 4: Forging common ground (Anne Seymour) – 5.22 of 6.00

Boundary spanning cards for explaining concepts – 2.88 of 6.00

General discussion – 5.0 of 6.00

Selected comments:

- Boundary spanning was an area I was struggling with in terms of understanding it. I think having it at the end of the year helped to reinforce the initial introduction we had at the beginning of the year
- Both case studies were good - helped illustrate the desired elements of Boundary Spanning and were easy to relate to. Boundary spanning cards were not really needed (although they are good to refer back to on occasion).
- the separate definitions may not be as useful as understanding and incorporating the whole process of boundaries and collaboration

13. Session 11: Championing and Leading Change. Please indicate how helpful this session was to you as a leader.

Using models to look at change dynamics – 5.50 of 6.00

Assessing need for change – 5.20 of 6.00

Case study 5: Leading Change (Kelly Gonzalez) – 4.70 of 6.00

Sustaining energy and focus for effective change – 5.00 of 6.00

Taking care of staff during change – 5.40 of 6.00

General discussion – 5.30 of 6.00

Selected comments:

- This is another area of the session that I feel is vital for our participants. Greatly appreciate discussion of taking care of our staff during changes. This is really important to me and this allowed me to refocus my efforts in this area. Thank you!
- Models generated good discussion. Case study provided a good illustration of need to manage change on short notice. Handouts and worksheets are helpful.
- I liked the case study and tools provided on this topic. May be useful for participants to talk more about their comfort with change.

14. Session 12: The Mock Interview exercise had several components. Please rate how helpful these were to you.

Preparation process -- instructions and conference call – 5.44 of 6.000

Questions asked during the mock interview – 5.44 of 6.000

Feedback session with mentor – 6.00 of 6.000

Group debrief/discussion led by Kathryn – 5.60 of 6.00

Interviewing and managing negotiations for directorships – 5.70 of 6.00

Overall mock interview experience – 5.78 of 6.00

Selected comments:

- This is one of the hallmarks of the program. I know that my own experience with the mock interview as a previous fellow was very impactful. I appreciate the changes made including the standard questions for the mentors to use to give a more consistent

experience. I appreciate having a diverse group of well thought out questions to use which took the stress off of me in having to create them.

- This entire process was extremely helpful - thank you! Appreciate having access to the list of interview questions afterward too.
- Tips and tricks for preparing were helpful. I think my interviewer did not follow the same "harder" questions. It was good because it was the format the interviewer experienced but I am not sure I am readily prepared for some of the more difficult questions. I thought the follow up with the mentor and feedback was great. Provided me some confidence and good ideas on what to work on going forward. The session about negotiations was great and more time could be included here. I think that the prep materials for the mock interview should be reviewed for how they look at diversity. Additionally thinking about how new directors will be asked about diversity and how they will support it should be included and discussed. More emphasis on budget may also be good.
- I would have liked a little more feedback on the resume/cover letter. I'm never sure whether how I do the resume especially is appropriate for these positions.

15. In terms of the mock interview exercise, please evaluate the length of time spent on these components?

Mock interview -- Just right 100% (this year it was 45 minutes long)

Feedback from mock interviewer -- Just right 100% (30 minutes, but could be combined with break)

Group debrief discussion – Just right 66.67%; Too short 33.33% (1 hr 15 min combined with negotiating directors position)

Selected comments:

- Would like to get feedback from interviewer written up (I plan to request this from her). Perhaps suggest that this be done for everyone as part of the process: Each fellow get feedback reports from their interviewer.
- I see the mock interview as very similar to a first-round interview. Good to understand that this may just be the first step in a long interview process.
- This was (as predicted) a really great experience. I know it's usually done earlier in the fellowship, but I thought it worked really nicely as part of the "Capstone."
- We liked the flexibility of using the total time as needed. In retrospect we probably could have spent a little more time on the interview itself.

16. Should the timing of the mock interview be based on specific content covered in prior sessions? That is, should specific content precede or follow the mock interview? (open-ended question)

- I think strategic thinking, communication, change management should be covered before the interviews.
- The strategic thinking content should definitely precede the mock interview. It really helped me be in the right mindset for the interview when the time came.
- It worked nicely to have it after the NLM/AAHSL/ARL sessions, because that gave us a chance to think about the broader picture of AHSLs and their environment.

- I think the prompts that were provided to mentors (later revealed) were appropriate. It seemed to be focused broadly on leadership, communication, self-appraisal, budget-- all things we had spent time on in the past. I don't think we need a specific prep session.
- The timing worked great in terms of session placement.
- I think having it after the sessions on strategic thinking, leading change and communication is a good idea.

17. How well did the mock interviews work with the breakout room in Zoom?

Should be always done in person – 0%

Worked OK but not ideal – 10% (N=1)

Worked well – 30%

Worked well and good exercise for future online interviews – 60%

Selected comments:

- I think future mock interview sessions should incorporate the style that is in current use in the real world.
- I have no issue with Zoom for the interview and feel that it may be likely that candidates at first-round may undergo a Zoom as opposed to phone interview in the future.
- Online actually worked much better than I thought. In person would be lovely to return to, but I honestly didn't notice much of a difference.
- This was fine. We can all expect at least a screening interview to be online. The actual interview with just one person was a challenge since we knew you had to get our best answers in all at once.

18. Session 13: Managing negotiations for director positions. Please indicate how helpful this session was to you as a leader. (5.70 of 6.00)

Selected comments:

- Great to hear from those "in the know" about what can be negotiated for.
- This was eye opening. I really enjoyed it and would benefit from more resources related to this topic.
- Always learn something to apply to myself or when recruiting staff.
- The only thing I've negotiated for is salary. I've heard some of it before but have not been in a position to potentially negotiate for items at a director level. I feel much more confident asking for things beyond salary that will help me get off to a solid start in my new position and with my new team. I'll remember that if "you've gotten everything you wanted, you did not ask for enough."

19. Session 14: Respiring the Organization. Please indicate how helpful this session was to you as a leader.

Respiring presentation and discussion – 4.50 of 6.00

Creating and sharing touchstones – 4.22 of 6.00

Resources/handouts on respiring – 4.70 of 6.00

Selected comments:

- Taking time to reflect on ourselves with the touchstone exercise really gave me the permission I needed to reflect personally.
- Appreciated hearing about fear vs. anxiety. Seems we didn't really have enough time to cover some of this content. Touchstones were helpful reminder about "why I'm doing this" and what's important to me.
- I really liked this as a closing session. I enjoyed the touchstone project, it was nice to use things that had personal meaning to us.
- I had a hard time connecting this session to the rest of the work we did on this day in the workshop. Being held at the end of a long week (tiredness!), and also having this session online were at odds with the content. Still, I did have a great talk with my mentor. I wish that the 1:1 breakout time had been a bit little longer.

20. What is your overall rating of the Leadership Institute / Capstone in terms of being helpful in your leadership development? (5.40 of 6.00)

Selected comments:

- There is no other current program that offers prospective medical library directors with this kind of experience and exposure. This is such a vital program for AAHSL and I know that because I had the opportunity to experience this as a previous fellow that it made me a more successful director. Even some of our library staff recognized that my participation in the program helped to make our library better. As a mentor this helped to refresh and expand my knowledge.
- Pat and Kathryn did an amazing job with the program this year under the most challenging of circumstances. Their attitude during the entire program was extraordinary.
- The Leadership Institute/Capstone provided opportunities to see many of the leadership concepts we've covered over the year in context from leaders of libraries and library organizations. The case studies provided by the mentors were all spot on. The supplemental materials and handouts are high quality and I expect to refer back to them frequently.
- Overall a very good experience, I felt like it may have been more intensive if we're able to do in person. I think there are additional leadership tools/tests which could be considered for more rounded discussions. 360 is difficult but very effective for example.
- It has been a fantastic experience. I've learned so much from all the presenters, the leaders, AAHSL reps, and mostly, the fellows.
- Throughout the year, I shared resources and tools with my team and library admin staff. It's been helpful to have a steady stream of leadership exposure each month. My biggest takeaways are: I'm more ready than I think, I can lean on colleagues more than I thought, there really is not some big mystery to academic health sciences library leadership, academia politics are as colorful as I suspected, and it takes diligence to maintain focus and steadiness amidst competing interests, humans on staff, and budget things. I have a new set of resources that I've tried and that I've seen/heard in action.

The cone of silence and confidentiality reminders were helpful, too, as a reminder to listen with care and to know that I can freely share. The speakers/presenters provided a collegial neighborhood of sorts. It was helpful to get to know each organization and explore their differences and complementary efforts.

- I actually like combining the content of the two so there is a mix of more active and more active listening programming. If there were some pieces missing perhaps it could be scheduled for 4 days and then 3 days later on. 5 straight days might be too much.

21. What should be added to the Leadership Institute / Capstone? (open-ended question)

- Strategic planning, recruitment, negotiating salaries with employees, counseling and coaching employees
- Working with donors and the university development office, etc. Also more about working with search firms
- I would like to see more diversity themes woven throughout the course. Diversity really impacts everything and we need to demonstrate that, not just keep waiting until the diversity speaker can join us. More opportunities for self-reflection may need to add a session on using self reflection in leadership. Maybe good to have something addressing stress and anxiety in leadership and coping mechanisms.
- More case studies. Weaving diversity and inclusion themes from the beginning.
- I really appreciated when we started talking about the Bolman/Deal four frames. This is also something we were just discussing at MPOW. I think more integration of those concepts would be really good--I know lots of folks get them at Harvard, but I find it a really helpful framework.
- as mentioned, case studies by mentees, case studies or speakers from health care institutions, not just libraries

22. What should be eliminated from the Institute / Capstone? (open-ended question)

- I would not eliminate anything. If there was not enough time to fit everything in then perhaps there are some additional items that participants could do as homework.
- The virtual sessions are very hit or miss. Maybe find some alternative for these.
- Since Boundary spanning was covered at the Orientation, may not need to be part of the Institute/Capstone. Could still do a case study about it, though.
- I can only think of things to add!
- Boundary spanning, maybe as we didn't have the cards.
- if it has to be done this way in the future I would spread the content out over a few weeks and have at most a 2-day consecutive full-day workshop. That would of course present its own challenges in terms of scheduling, but I found the 4-day experience draining.

23. What worked best, what did not work as well.... What would you do differently? (open-ended question)

- Pat and Katherine did an amazing job of converting this to a virtual experience. Guided discussions and case studies were great, and handouts and supplemental materials were all helpful. Mock interview was invaluable and I feel much more confident about applying for upper leadership positions. However, it was very difficult to have that much time online. By the end of the 4-day session, I was exhausted and burned out on screen time. We also missed out on opportunities to have "fellowship" over meals, walks, etc.
- Overall I thought it was good but I would add diversity examples and topics throughout. I wish we had more structure around building our cohort, that really seemed "on us" to do but having tools to help with that may have been good.
- Always schedule as much time as possible for the Q&A.
- I would plan to incorporate some more interactive and engagement elements beyond discussion. The breakout rooms, the showing touchstones were good for this. We could have used symbols to show enthusiasm, interest in things on a whiteboard or paired up to explore some themes or topics.

24. Given that this year's Institute / Capstone content was delivered via Zoom, please rate how well the online format worked for you?

All content delivered live 0%

Leadership topics live, association presenters online 0%

Leadership topics online, associate presenters live 0%

Content should be mixed – both live and online – depending on topic 90%

All content delivered online 0%

Pre-record presentations, discussions online 10% (N=1)

Selected comments:

- I think the new experiences we have all had supports the opportunity to take some of the sessions online besides the monthly webinars.
- Hard to judge this fairly, since we didn't get the experience of visiting NLM or the ARL office, etc. I think a visit to NLM would be a meaningful part of the experience.
- I think we really missed out on the in-person visits. I think that some sessions can be online but the more online the less connectivity I feel to the cohort. Need to be sure all presenters are comfortable with the technology.
- I thought the online format worked well and more online content could be combined into both the institute and capstone in the future.
- It worked pretty well to have it all online, but I really missed the opportunity for hallway conversations, and also the chance to really be present w/o technology distractions. If I had to choose, I'd say have leadership topics live but association presenters in person, but hopefully you won't have to choose.
- This is my almost-tied other preference: Leadership topics should be presented live, but the association presenters could be online.

25. Connecting as a learning community and building a peer group/network is an important goal of the Leadership Fellows Program. How successful was this year's program given that the Orientation was "in-person", but the rest of the content was online? (4.78 of 6.00)

Selected comments:

- I think that because this was such an unusual situation and we were all dealing with a same source of stress (COVID-19) that we had a bond because of that. While none of us wanted to be totally online for this it felt like this program helped to support us while this was going on since it was a small group and we were going through this together.
- This was the hardest part of doing most of the program online. You miss out on the dinners, breaks, and other little side conversations that help build that sense of community.
- One of my big take-aways from this experience, other than the content of course, is that I now have a group of mentors and peer mentors I know I can turn to whenever I need to. The Fellows also met monthly as a group separate from the scheduled all-group sessions, which helped us build relationships and bonds.
- I wish I could have gotten to know the cohort better. I don't feel that I do. I feel that while we were connected during this time we will probably drift apart and not be as strong a cohort as previous years.
- It was pretty successful, but I think it would be useful to have a more formal structure for fellows to meet w/o mentors. If we hadn't taken it on ourselves to start meeting, we wouldn't have built that network--which in turn really helped w/ creating more closeness among the whole group.
- It was not a bust! In-person time always wins for me. For welcoming other org speakers, online was great. (I think about reducing travel.) A weeklong capstone would have provided more organic opportunities, but we all did the best we could with super weird circumstances.
- We sincerely cared about each other due to Covid. .
- While it's nice to be in person, I think that we were able to work together as a group online. Seeing our home environments (pets!) encouraged more informal conversations.
- Building the network was definitely more challenging due to the abrupt change of plans. I went through a period of "mourning" because that was the part of the experience I was looking forward to the most... I feel grateful that my peers were all on the same page in terms of valuing the community and that we all worked to make it a priority.

26. If the program had to continue as primarily online, what activities or program structure would help foster a connection among all fellows and mentors? (open-ended question)

- More small groups and an effort to have everyone have one on ones with each other as part of a getting to know each other before the formal program starts

- People need to feel safe to participate fully in discussions. An in-person meeting at the beginning is essential in order to establish this. Then relationships can be built upon from there.
- Encourage the group to meet outside of the scheduled time or build in time specifically to the fellows. Maybe provide some homework or activities that keep the conversations going after the sessions.
- More and sometimes longer breakout sessions. Helps to build connections when group is smaller and conversation can happen.
- FailCon of sorts. What happened as a leader that didn't work out so well for you? How did you course-correct?
- Pet parade, happy hour, family parade, hat day.,
- If orientation is online next time, then definitely include time to get to know each other. I don't remember exactly what we did last year.
- I have no good answer for this- am currently struggling with this in other situations. I know there's a lot of good information available abt fostering relationships and community w/ distributed teams and would encourage planners to pursue this.

**27. How well did the breakout rooms in Zoom work for discussing cases and specific topics?
(5.90 of 6.00)**

Selected comments:

- The only problem was they were too short.
- Breakout rooms were great and also helped break up the day a bit, which was good.
- The breakout rooms provided more opportunities to hear from others. I think these were well done in most cases. More time would be good. Some mentors spoke most of the short time making it difficult to really engage, more like just listening. I liked being in rooms with different people and hearing different perspectives.
- breakout rooms are an excellent feature of Zoom.. there are also whiteboards and other features we could use in the future.

28. How useful was Jamboard in capturing the breakout room discussions?

Did not use 50%

Not needed / took notes other ways 30%

Somewhat useful 20%

Selected comments:

- I actually wasn't sure how to use it but we didn't seem to need it.
- I found it useful but noticed that others were not using it.
- I wish it would have worked better for the note-taking. I think it was limiting to have one group per page.

29. This year we were not able to travel to DC to visit the National Library of Medicine. How important is visiting the NLM facility/campus to you as a leader? (4.40 of 6.00; 3 mentors and 1 fellow rated it as 6.00; the one fellow who rated it as 2.0 had already been to NLM)

Selected comments:

- This might be one of the few opportunities for participants in this program to visit the National Library of Medicine and it helps us to have a better understanding of NLM and feel connected to it and could help us better advocate for it with our own institutions and legislators.
- Because NLM's resources and strategic priorities drive much of what we do in health sciences libraries, and also overlap with/intersect with MLA, I feel it's important to have the opportunity to go there and see their work in context on the NIH campus.
- I have visited the NLM facility/campus before. If we were invited to a future site tour to say hello and see the space, I would go. Having the session speaker programming and access to NLM web resources was a decent proxy.
- I think it's generally very important as a leader to be able to go to meet people there (and perhaps as a point of interest).

30. How important was it to have paper copies of the handouts? (5.10 of 6.00)

Selected comments:

- I took lots of notes on mine and plan to refer back to them frequently! [fellow]
- I would love to have PDFs of everything. [fellow]
- I had two screens and a laptop and phone and iPad I could have used. I needed the paper to keep track of timepoints and reduce eye strain. Please keep the paper. Pat did an excellent job of preparing the packet and using different colors by day. Really, that worked out super well. [fellow]
- It was MUCH easier to have print copies to review rather than switching screens back and forth. Don't change that! [mentor]
- this was great, thank you! [fellow]

31. Please share any other comments or suggestions you have about the Leadership Fellows Program, Zoom or the use of an online format. (open-ended question)

- While Zoom was useful for the virtual meeting I feel something like Microsoft Teams would work better.... Overall, I'm so glad to see the program to continue to thrive and be as impactful as it was when I went through it in 2013. It has only continued to improve and be vital for our member institutions and is definitely a point of pride for our profession as it has made a positive impact on our institutions that we serve and places us on a more level playing field with our institutional leadership teams. I think this has developed into a world class program. I am so grateful to have had this opportunity to see the fellowship from the other side and to continue building my knowledge and understanding of leadership. Thank you to all who make this program possible.

- Much preferred Zoom to WebEx.
- I think it will be important for the program to look into virtual options in the future but perhaps not for all sessions. I think it was well used in some cases but does not allow for us to really get to know each other.
- The capstone was a lot all at once. I dreamed of an in-person session with roundtables where we could chase a probing question related to the person's work. Zoom and PowerPoint together, with long days, brings out the worst in all three. It's nobody's fault...Thank you so much for continuing to be generous with the breaks and for listening to our feedback about needing more space with the speakers. The mentors were a talkative bunch from the get-go (thinking of the webinars). Asking fellows to chime in first was REALLY appreciated. Thank you Pat and Kathryn for being so mindful of the learning objectives of the program and the opportunity to shift to an online format. That could not have been easy! You really did a fantastic job of making it work for us.
- Zoom worked great. It was an intense week but we had our pets and family with us. For those of us who traveled a lot pre COVID this worked well.
- THANK YOU for all your dedicated work, Pivots, and expertise in making this year so successful! P.S. This is a very Long survey.
- thank you for being so mindful of the need for breaks. And thank you for all of the work and painful decisions that went into changing the format and making it work no matter what! There is always room for improvement but you made the best of a challenging situation and your examples of leadership in doing so will stick with me.

Appendix J

NLM / AAHSL Leadership Fellows Program

Final Evaluation Institute Capstone 2019/2020 Part II

1. **Please indicate if you are a Fellow or a Mentor** -- Fellows 45% (N=4); Mentors 55% (N=5)
One fellow did NOT participate in Part II of the final evaluation.

2. **Session 15: How helpful was the content and presentation about ARL information policy and scholarly communication activities (Rutenberg)? (4.71 of 6.00)**

Selected comments:

- This is important even for non ARL members to understand the work that ARL is doing on behalf of academic libraries.
- Very good to know about ARL initiatives and what drives policies. Also good to use ARL as a resource for tracking trends in academic libraries.

3. **Session 16: How helpful and informative was the content and presentation about scholarly communications and SPARC (Joseph)? (5.63 of 6.00)**

Selected comments:

- I was able to reflect on Heather's four main initiatives and incorporate these into a brown bag session (taught by a colleague) the next day.
- This is such an important area for library directors to understand especially now as libraries face even more challenging budgets this year and potentially the next few years.
- This was my favorite presenter!
- So important to know what's going on in terms of open access, journal subscription negotiations and big deal cancellations, etc. Very timely session, given all that's going on in this arena currently.

4. **Session 17: How helpful and informative was the discussion with the AAHSL President (Franklin)? (4.88 of 6.00)**

Selected comments:

- Sandra is such a collegial person and represents AAHSL so well and it is always good to hear from our leadership. I think this session helps connect the fellows to the organization which helps them with building their relationship to it especially with future involvement.
- talk more about how AAHSL can support a broader number of librarians looking to become directors
- Good overview.
- Good to hear about AAHSL initiatives and activities.

5. Session 18: Leading and Shaping Organizational Culture. Please indicate how helpful this session was to you as a leader. (5.44 of 6.00)

Selected comments:

- This can be a challenging area for directors and the inclusion of it can help new directors create the kinds of organizations their organizations need.
- perhaps more health care organization examples of climate vs. culture
- There was a good overview in this session about climate and culture.

6. Session 19: Leading with an Equity Lens. Please indicate how helpful this session was to you as a leader.

Role of leader in developing / maintaining an inclusive environment-- (5.22 of 6.00)

Leader's role in today's environment-- (5.22 of 6.00)

General discussion-- (5.44 of 6.00)

Pre-institute readings-- (5.44 of 6.00)

Selected comments:

- While this is certainly a timely session given our current environment I think this an important piece for future cohorts to continue having as part of their learning modules. I appreciated Mark's thoughtful approach in the discussion.
- less time on the "pond" concept and more time with real examples
- I really liked the reading about the Path. I feel that this session overall was not sufficient. There should be more focus on leading diverse teams throughout. This session had too much content for the time allotted.
- Move this session earlier or as another participant suggested, weave these themes throughout the program.
- Great article given as pre-reading! I even passed it along to our university's diversity officer. Good discussion - too bad it had to wait until the very last day. Would have been good to have it much earlier so we could be more mindful of having a "diversity filter" in our minds throughout all the discussions, etc.

7. How well did the Institute / Capstone allow for discussion and processing of new information? (4.50 of 6.00)

Selected comments:

- Thank you for incorporating more time to reflect on presentations and for checking in about time available for small groups or large group discussion.
- I found it challenging, to be honest. I could definitely have used more time for reflection and I think a setting where I could have been immersed in the material (rather than competing demands of work, being at home and dealing with problems there etc (would probably have made me feel more able to engage with the material.
- I appreciate the continuous check into our well being during the sessions and request for feedback...it would have been better to view the reflection questions after each session and then answer the next day or so as I absorbed the discussions and my thoughts.

8. Thinking back over all the Institute / Capstone sessions how well did the Capstone balance contributions and participation by both fellows and mentors? (4.56 of 6.00)

Selected comments:

- It was mostly balanced. Mentors had a lot of enthusiasm and questions at the beginning of the capstone during presentations. I appreciated Kathryn and Pat explicitly making time for fellows to respond to presentations or just in during checkins.
- Noted in the comment for the previous question. Conversations seem dominated by mentors. Not enough time was given to allow fellows to find their voice or come through with a question.
- Both fellows and mentors were fully engaged and participated in conversations. Appreciate the mentors developing the case studies for us to use.

9. How well did the mentors and faculty (Deiss, Committee Chair, Program Director) further the goals of the sessions by providing content, context, and facilitation? (5.44 of 6.00)

Selected comments:

- We had such a well-balanced team leading us and you work so well with each other. Kathryn facilitates with ease, Pat keeps us together and organized and I so appreciate the input from the committee chairs. Their contributions helped to round us out more and share other views. I know this a big time commitment from them as well as our whole facilitation team and I think it adds an extra layer of richness to discussions!
- I think the case studies were. Like the suggestion on having case studies by the fellows, particularly since several fellows chose to have outside speakers at their monthly online session, rather presenting on their own. Kathryn's expertise and handouts are excellent. Committee Chairs and Pat were also good at providing reinforcement and examples
- Appreciated that faculty incorporated feedback from fellows and adjusted accordingly.

10. Please rank the sessions focusing on other organizations/associations in terms of their value to your leadership development? 1 is the highest value or most critical and 5 is of the lowest value. [NOTE: when averaging score #1 equals 5 points, #5 equals 1 point]

RANKING highest to lowest

NLM Leaders, operations, strategic initiatives -- **(4.71 of 5.00)**

Information policy , legislation, scholarly communication (ARL, SPARC) -- **(3.56 of 5.00)**

AAMC services/activities -- **(2.63 of 5.00)**

AAHSL services/activities -- **(2.22 of 5.00)**

ARL services/activities -- **(2.11 of 5.00)**

11. To what extent did the Institute / Capstone present the roles of organizations important to academic health centers and introduce key players? (5.11 of 6.00)

Selected comments:

- All the groups included are so vital to us and I so appreciate especially having the opportunity to hear directly from AAMC folks.
- Providing more connection with ARL would be good.

- I don't think it was clearly articulated/presented that the invited presenters from the various organizations were speaking as as representatives of "organizations important of academic health centers".

12. Are there other national groups or associations should be part of the Capstone content? If yes, please suggest them.

- I think it would be interesting to mix other professional associations in; **AAAS?** other health sciences disciplines, eg **nursing? AMIA? NASEM**
- **ACRL** Specifically the value of the academic library.
<http://www.ala.org/acrl/issues/value>
- Perhaps it would be helpful to have someone from the **business side of health care systems and also research...**The Society for Healthcare Strategy & Market Development (**SHSMD**),
- **CNI, AMIA,**
- fundraising/development groups

13. Did you find the Orientation held in November helpful for creating a sense of community? (5.89 of 6.00)

Selected comments:

- Yes, definitely. It was essential to have time to connect with my mentor and with fellows and program faculty.
- Especially since it was our only chance to be together in person! I think if we hadn't had that time together, we (fellows) would have found it really hard to gel as a group. The initial meetings, tho always a little awkward, were essential for building trust.
- I think it is so vital for the cohorts to start together in this way to begin building the community. The only thing I would change here is for folks to meet in an informal way first to get to meet each in a casual setting. Breakfast at round tables to get to know each other and then move to starting the orientation.
- This was a great opportunity. Would be good to see more team development happen in this environment.

14. During the Orientation, we spent time explaining the components of the Program, focused on your personal vision for the year, debriefed two leadership instruments, introduced concepts of boundary spanning and the Layers of Leadership, allowed time for fellow-mentor pairs to meet, and talked about the fellow-mentor relationship. How appropriate or helpful was this content? (5.67 of 6.00)

Selected comments:

- I think this helped set the tone for the year and laid the foundation for us. The boundary spanning was difficult for me during this session but I love that we covered it again at the end as it clicked for me.
- I would suggest adding a short time for a meeting with just mentors and just fellows, although I think there was some time to do that before the official Orientation.

- The goal setting exercise was great, I enjoyed talking to my mentor.
- The Orientation really helped lay the groundwork for the rest of the fellowship experience - no question.

15. Were the leadership instruments you completed prior to Orientation and your debriefing valuable to you (or your fellow) for building self-awareness, and in planning your fellowship experience? (5.22 of 6.00)

Selected comments:

- yes. I thought I knew what I needed to work on (and I wasn't wrong), but the instruments and debriefing showed me even more and provided more personal context for my strengths and weaknesses
- These were absolutely helpful for me! I don't think we do enough of building our self awareness in our "regular" lives and this opportunity gives us the "permission" to do it.
- May be useful to expand some of these and include instruments for diversity or change since those are big topics as well.
- Definitely valuable, and I will refer back to them again and again.

16. Did your attendance (or that of your fellow) at the AAMC Annual Meeting foster understanding of the academic medical environment? (2.89 of 5.00) [5 point rating scale]
2 mentors did not attend; all 4 fellows attended

Selected comments:

- I paid attention to different things this year due to the AAHSL orientation. Socializing with other fellows at AAMC was valuable. [fellow]
- I had attended AAMC before but it was eye-opening to go again at this stage in my career and realize how much non-medical education content there was. [fellow]
- Attended one day but didn't discuss in detail with mentee. There was a session about women in academic medicine leadership and that content/resources could be useful.
- I really enjoy going to AAMC when I am able. I learn new ideas and more about the academic medical environment. The programming is very beneficial to future directors. [fellow]
- To some extent - I work closely with our medical college, so feel like I had a good foundation already. [fellow]

17. How appropriate were the webinar topics for filling in gaps in the overall learning experience? (5.11 of 6.00)

Selected comments:

- I wish we could have come back to more about working with donors. I would have also welcomed a tour through "major things we see in common across library budgets."
- I think the variety of topics gave us a good view of the different issues in leadership.
- Really enjoyed working with my mentor on our webinar, and got a lot out of all the other webinars.

18. Thinking about the Virtual Session topics including the presentations, readings, assignments and discussion, how helpful and informative were these topics to you?

Versatile leadership (Deiss) -- (5.38 of 6.00)

Strategic team building (Kouame, Fought) -- (4.75 of 6.00)

Strategic resource allocation (Conte, Gonzalez) -- (4.75 of 6.00)

Leadership during a crisis (Deiss) -- (5.25 of 6.00)

Leadership during a crisis II --conversation about your experiences (Deiss, Seymour) -- (4.86 of 6.00)

Leading with Innovation and Creativity (Glenn, Seymour) -- (5.00 of 6.00)

Development work in libraries (Hurst, Bland) -- (5.13 of 6.00)

Organizational structure (Sevetson, Rand) -- (4.25 of 6.00)

Comments and suggestions for other topics

- I think strategic planning would be a valuable topic area. This is such a big area but I think that leaders need to have exposure to it and work on developing it over a long period. This would give an opportunity to learn about the tools that are available for helping us chart our courses to help us move our organizations forward. Of course a future cohort may come from organizations who do it well so it might not be needed every year. Also I think assessment and evaluation warrant their own session as well and perhaps ACRL could be brought into that session as well. [mentor]
- Suggest outside speakers be asked to limit presentation to no longer than 35 minutes so there is ample time for mentee to also present and then open discussion. [mentor]
- Needed more time for Leading with Innovation. Organizational Structure was somewhat different from what I was expecting, but was a helpful session to discuss relationships with affiliated health systems. I was expecting that topic to focus more on the relationship between health sciences libraries and the larger university environments. [fellow]

19. Did you fully prepare for and participate in the assignments and readings preceding the monthly webinars? (5.56 of 6.00)

Selected comments:

- I prepared for all sessions I could attend and did the prework even if I couldn't attend the sessions.
- The assigned readings gave me a good reason to read professional literature and i appreciate the assignments that gave me a chance to think more in-depth about the topics.

20. How useful were the AAHSL email lists during the program?

AAHSL-leaders20 (fellows and mentors) -- (3.11 of 6.00)

AAHSL-all (all AAHSL members) -- (4.33 of 6.00)

AAHSL fellows 2020 -- (0.56 of 6.00)

AAHSL mentors 2020 -- (1.11 of 6.00)

Selected comments:

- forgot about them. Could have been useful. [mentor]

- I think that I lost track of these as communication options. I only used Basecamp. [fellow]
- The fellows tended to communicate as a group via chat on our phones. [fellow]

21. How useful or valuable was the online communication using Basecamp (document sharing and email) to you? (5.89 of 6.00)

Selected comments:

- Basecamp was really useful to me. Keep it, please.
- It was so much easier to go to Basecamp than deal with my email issues (institutional migration then too much email). I wished I had started using Basecamp consistently from the beginning and I appreciate the calendar on the system so I could confirm sessions on it.
- Useful but a bit clunky.
- Basecamp has been very useful for discussions and as a document repository.
- So nice to have this available - will need to download some of the content before it goes away!

22. How successfully did the site visit address your (your fellow's) learning goals? (5.56 of 6.00)

Selected comments:

- the site visit was a good mix of what I wanted to see and what my mentor thought, based on her experience, I should get from the visit
- My fellow commented to me that we met her goals and she worked well with me to help me understand them. It was easy to design the site visit experience because of her own understanding of what she felt she needed.
- I think two out of three were addressed.
- My mentor created a welcoming space and scheduled meetings with leaders that helped address my goals.
- I definitely learned a lot about navigating organizational culture and politics as well as developing a strategic organizational mindset. Seeing my mentor in action with other top university leaders was very eye-opening.

23. How well did the site visit introduce you (your fellow) to a different type of environment? (5.00 of 6.00)

Selected comments:

- VERY different. I loved that.
- My fellow and I talked about the differences in our institutions and she helped me to understand hers as compared to mine.
- This university has a very different reporting structure than my own and was eye-opening.
- So beneficial to see a different environment. We had a "bonus" site visit" to Vanderbilt University as well, which as an even different environment.

24. How well did the site visit demonstrate different leadership roles and styles? (5.22 of 6.00)

Selected comments:

- Great opportunity to see different leadership styles at work.
- It was a great opportunity for my mentor to see leadership in action as many people were preparing for pandemic response.
- Great to observe my mentor as well as other leaders at the organization and see how they interact with one another as well as with those who report to them.

25. How well did the site visit provide you (your fellow) insight into relevant issues and initiatives? (5.67 of 6.00)

Selected comments:

- I felt she had a chance to hear from various people about different issues.
- Great opportunity to see how another library is dealing with issues in ways different from my own.
- Good to hear about issues and initiatives in the library and organizational context.

26. How well did the mentor-fellow relationship meet your (your fellow's) expectations? (5.63 of 6.00)

Selected comments:

- I think the session for mentor's at the orientation and the mentor handbook helped to set the tone for me so that I was aware most of the time to make sure I was focused on her needs and to help her in her learning and discovery without telling her only about my experiences. I think the folks who did the matching did a spectacular job of matching us and I appreciate all the work that must have gone into that.
- We were doing well prior to COVID but then regular communication became more difficult to schedule, or be helpful.
- I am very pleased with the relationship and mentorship I was able to create with my mentor. This has been a rewarding and fulfilling experience.
- The site visit was a key component of the Fellowship experience for me.

27. How well did the match of your mentor-fellow pair contribute to meeting learning goals and a productive relationship? (5.78 of 6.00)

Selected comments:

- This was a very productive relationship for me as a mentor and I learned so much from Emily as well. She was very open to wanting to learn as much as possible and I was very glad that we met twice a month.
- My mentor was very responsive to my needs and provided me with opportunities to meet and discuss issues and goals.
- My mentor and I were well-matched. While we are similar in some ways, there are definitely areas where I needed development where they have strengths and could help and support me.

28. How successfully did you (fellow and mentor) maintain regular contact throughout the year? (5.67 of 6.00)

Selected comments:

- We scheduled 1 hour meetings twice a month and found that to be a good schedule for us and were able to maintain it. We still plan to meet and have already had 1 meeting since the end of the fellowship with another scheduled for the end of this month. We both feel we want to continue building our relationship and though it will obviously change I look forward to seeing her future successes and supporting her while sharing mine.
- Difficult to schedule once COVID started and our buildings closed.
- We met every other Friday and continue to meet for now. I hope to continue to meet with my mentor in the future.
- We were in regular contact - would have been good to have an established routine schedule, but we met as needed.

29. How frequently did you revisit your (your fellow's) learning goals throughout the year?

Never once set (11.11%, N=1)

Once (22.22%, N=2)

2-3 Times (66.67%, N=6)

More than 3 times (0%)

Every time we talked (0%)

Selected comments:

- This is ok, though as our calls were usually about immediate needs, which was extremely helpful
- This was an area that I did not do well for my fellow in terms of formally looking at the goals. We kind of put them aside and I realized it only a few weeks ago and asked her to review them recently and we realized that we had pretty much covered her goals. *I think because we designed the site visit around them that helped us to accomplish most of them and we presented one of the topics on an area that was one of her goals so though we didn't formally address them during our meetings we managed to meet them because of intentional scheduling during the site visit. I would suggest future cohorts schedule a formal review midway through the program or I would do that myself if I have the opportunity to participate again.*
- We only checked in with these a few times in the beginning and toward the end.

30. Thinking about the site visit, how would you rate your experiences in following areas? [5 point rating scale]

Establishing a relationship with your (fellow/mentor), setting goals and clarifying expectations -- (4.56 of 5.00)

Surveying the organizational and institutional environments for threats and opportunities-- (4.33 of 5.00)

Introducing (your fellow/you) to key people in the organization-- (4.33 of 5.00)

Advice and guidance on handling difficult organizational and/or personnel situations-- (4.78 of 5.00)

Honest feedback during teachable moments and in alignment with (your fellow's/your) learning objectives-- (4.22 of 5.00)

Opportunities to observe your (fellow/mentor) and engage in an open discussion about what you saw-- (4.67 of 5.00)

Fostering an atmosphere of exploration, curiosity and excitement about leadership-- (5.0 of 5.00)

Selected comments:

- I appreciate my mentor's honesty about the challenges, personal and professional, of being in a leadership role.
- I think it is vitally important to be honest about our institutional environments and share our successes and failures at our institutions. I also think debriefing each day and if possible after sessions with leaders is very helpful to discuss what was learned.
- The site visit was a great opportunity. I learned a great deal and my mentor created a good schedule for me that allowed me to accomplish my goals. This site visit
- I can't imagine *not* doing a site visit - it was incredibly instructive for me.

31. Thinking only about the site visit, how important was it to your overall leadership development experience in the program? (5.89 of 6.00)

OVERALL FEEDBACK.

PLEASE INDICATE HOW WELL YOU FEEL THE PROGRAM MET ITS OVERALL OBJECTIVES.

32. Introduce fellows to leadership theory and practical tools for implementing change at organizational and professional levels (5.56 of 6.00)

Selected comments:

- The program has a well rounded curriculum and experienced leaders facilitating our experience. I would just add assessment and evaluation along with strategic planning (as previously mentioned) for supporting implementing change at the organizational level.

33. Introduce fellows to critical issues facing academic health sciences libraries (5.67 of 6.00)

Selected comments:

- I think the case studies helped us introduce the fellows to real life issues and since they were all actual cases from the mentor institutions I think this was especially enriching.

34. Develop meaningful professional relationships between fellows and mentors that give fellows access to career guidance and support (5.89 of 6.00)

Selected comments:

- The year long program gives us the opportunity to build the relationships we all need in this profession.
- via access to the whole cohort going forward as well as the Committee Chairs

- This worked well for me but I understand this was not the case for all fellows.

35. Expose fellows to another academic health sciences library and its institutional leadership under the guidance of their mentors (5.78 of 6.00)

Selected comments:

- Again because of Emily's clear goals I was able to design an experience that met her needs and it helped that I have a supportive institution and leadership!

36. Examine career development and provide director models (5.44 of 6.00)

Selected comments:

- I think this group of fellows were inquisitive and wanted the opportunity to investigate and discover to understand their career development needs.

37. Create a cohort of learners who will draw upon each other for support throughout their careers (5.67 of 6.00)

Selected comments:

- These relationships were one of my biggest goals and needs coming into the program and I am so grateful that we were able to bond. [fellow]
- Though I did not get to observe the fellows building their relationships I heard from Emily about their meetings and it sounded like they were forming a good community.
- Difficult to say, I hope so but I do not feel very connected to the cohort. [fellow]

38. Promote diversity/inclusivity in the leadership of the profession (4.78 of 6.00)

Selected comments:

- I think our profession works well in this area and are sensitive to this to start with and I felt this group exhibited these traits as well. I know Emily has a big interest in this area and I'm glad that we had a session devoted to this.
- More could be done here. I think that it would have been helpful to have diversity topics run throughout the program, not just tacked on at the end. [fellow]

39. Offer recognition to emerging leaders and enhance their competitive standing (5.56 of 6.00)

Selected comments:

- The fellowship has a reputation as a quality leadership preparation program and I think that is why it seems so competitive. It is true that recruitment firms target graduates of this program which I expect has given some of our graduates an edge over other candidates. [mentor]

40. Did you feel the blended curriculum (in-person group time, virtual session topics, online content, site visits, and one-on-one mentoring) worked well to meet Program objectives? (Yes 100%; No 0%)

Selected comments:

- I think it worked as well as it could have during the Plague Year and am grateful to everyone for their flexibility and courage to try something new. [fellow]

- The variety of the blended curriculum gives us different perspectives and supports different learning styles.
- I think each of these components is important and makes this leadership program unique when taken as a whole.
- It worked well enough for most objectives. I think it hinders some of the group development and deeper conversations. [fellow]

41. Did you have the opportunity to get to know mentors (or fellows) other than your own? (YES 66.67%, N=6; NO 33.33%, N=3))

Selected comments:

- Very limited, largely due to just how relentless this year was. I got to know others a bit more during the institute.
- The virus really inhibited this.
- only through the mock interview, which was really nice.
- I really enjoyed meeting the fellow I interviewed and I think that the whole group will feel comfortable reaching out to any of the others whenever needed. I do wish I had met some of the other fellows more but our unusual environment this year made that a little more difficult. I did enjoy the breakout sessions where Pat made us appear and reappear and I would end up with some of the different fellows!
- through the mock interview session and also the discussions.
- Not very much.
- I do think more in person opportunities would have helped in development of connections.
- This would have been more true if we had met in person. I would say I got to know more *about* other mentors, but I really only got to *know* the mentor who did my mock interview as we had protected 1:1 time. I feel I got to know her much better through that experience.

42. Did the Program's design and workload allow you to satisfy your expected level of participation while fulfilling other professional or personal demands? (YES 100%; NO 0%)

Selected comments:

- overall, yes. Once we moved to a work from home environment it was much more difficult for me to carve out dedicated time to focus on leadership and development [fellow]
- I think this is rigorous but not too much and I think it needs to be a little challenging for us to receive the benefits of the program. I appreciate the continuous learning throughout the year and the readings and assignments that support our learning.
- Things became more difficult and complicated related to time to devote to the program after COVID19. [fellow]

43. How well did the faculty and AAHSL personnel support you as you progressed through the Program? (5.78 of 6.00)

Selected comments:

- I welcomed their support, but sometimes didn't know if they were there observe, lead some element of the program, or participate. I was pleased to get to the faculty throughout the program.
- very accommodating and understanding of challenges and barriers. the faculty set a great example of leading with grace and practicing clear communication through all of the uncertainty of the year.
- We had phenomenal support and I felt they were always there for us and it had a "concierge" feel to it at times. While we were intently learning we knew we had AAHSL faculty and personnel ready to assist us at any time. They were also so patient with us as we navigated the year. Pat and Kathryn made an incredible team! I miss them already! The only area I would improve in the support is having someone oversee the webinar experience and scheduling. When there was technical issues during the webinar my fellow and I facilitated there didn't seem to be the support expected including the expertise and my fellow had to provide the support while I kept getting technically dropped out of the session (one of the few sessions I had problems with!).
- Everyone did an amazing job of providing for my needs, especially given the special circumstances this year.

44. Did your participation in the Program have an effect on the staff of your home library? (YES 77.78%; NO 22.22%, N=2)

Selected comments:

- I think my team in particular benefitted from me working on improvements to my communication style, and I think I am a better partner to my co-manager now with a more robust understanding of strategic thinking. [fellow]
- They loved Emily and still ask about her!!! It also gave me an opportunity to talk about why we were involved with the program and its importance. I was also able to involve many of them to meet with her and it gave them a chance to look at what they do and how they do it to talk with someone outside of our institution who would understand what they do. This also reminds me that while the program is developing the fellows and mentors that it also indirectly develops our staff as we bring information back and implement things we learn so in effect it is impacting so many more people than just the cohort.
- I have applied skills from this program to my interactions with my staff. [fellow]
- Had a chance to meet and interact with my fellow, and get even more understanding of the program as one of our ADs was a fellow in the previous cohort.
- I am more mindful of how I communicate and work with my team. [fellow]

45. Please describe how you think your career (or your fellow's) will be impacted, in the near-term and long-term, by participating in the Program. (open-ended)

- I am optimistic that I will be able to better identify leadership, power, structural, and operational factors in settings and pursue a path toward resolution. I have more confidence in my ability to navigate academia as a leader. I am 150% more confident about pursuing a library leadership position and representing the library and profession to campus partners. [fellow]
- My fellow was unsure of whether they wanted to be a library director or not. I think this program helped them clarify their long-term goals.
- In the near-term I have more clarity about what I want for my future, goals, and the sort of environment in which I can both thrive and make a difference. In the long term, I think I'll continue to use many of these skills. [fellow]
- I think my fellow has a stronger foundation in place and additional confidence to take on higher level positions. I expect that she will be discerning about the positions she takes and her experience in the program will support more informed choices.
- Having this program on your CV and being able to utilize/internalize many of the concepts presented will be a long-term benefit.
- I hope to see more opportunities to apply or be considered for leadership roles. I look forward to more engagement in professional organizations. [fellow]
- My leadership training over my career and my experiences as both a fellow and mentor in this program have helped me in countless ways including securing my current position and helping me think about future leadership opportunities.
- I definitely feel more prepared to apply for and assume a higher level leadership position, should the right situation present itself. [fellow]
- Reminder of and refresher of my leadership responsibilities, success, and failures. I was job hunting during the program and was able to turn down a job (a lateral move) and find ways to determine that how to expand my role in my current institution.

46. To what extent were the goals and expectations in your learning plan (or your fellow's) fully met? If not, what could the Program have done differently to promote success? (4.78 of 6.00)

Selected comments:

- My learning plan items were met in large part during my site visit, but also formed the basis of monthly checkins. My mentor was dialed in on the goals for the site visit learning. We were both in tune with the goals, which were not just *mine*. We asked questions and learned together. The site visit was aimed in that direction of mutual learning. For future Program participants, an explicit checkin could work, but also, tracking on our individual goals is part of self-directed learning. I think Pat and Kathryn emphasized this well. We do get out what we put into the experience. [fellow]
- Who could have expected what happened this year? So of course a lot of my initial expectations were not met. But in the end, I got from the program what I most wanted and

needed - some clarity around my future goals, and a group of peers for mutual support for the rest of my library career. [fellow]

- I think the program should remind us to do a mid-year review and encourage future groups to schedule the site visits to support the goals as much as possible. [mentor]
- Perhaps there could have been some time officially allotted to review of goals. This may have been one of the sessions that had to be deleted due to the mash-up. [mentor]
- Most goals were met or exceeded, I had a few areas that need just a bit of follow up. [fellow]
- Maybe some group discussion about goals and time set aside for review of goals. [mentor]
- The Program didn't need to do anything differently. I should have taken more responsibility to re-visit my learning plan more regularly. [fellow]

47. Did you seek and receive full reimbursement for applicable expenses incurred as a participant in the Program? (YES 87.50%; NO 12.50%, N=1)

If no, please explain or comment if you had problems

No problems. Did not have anything that needed to be reimbursed.

48. Please recommend note any changes to improve the Program or other thoughts about being a fellow or mentor?

- One thing I wish I had done is capture simple reflections in a digital diary format. I would have asked myself "what's the biggest takeaway from this session/interaction?" and "which resource was most relevant/informative/useful?". The survey assessments did ask these to some degree, but I wish I had been more proactive in developing a system to capture this info for myself, for post-Program reflection. [fellow]
- No recommendations. It's a great program! [mentor]
- I am grateful for the opportunity. It came at the perfect time as my career was reaching a decision point. I value the relationships I've made and what I've learned, both about leadership and about myself. [fellow]
- Since this was such a challenging year and the cohort missed out on in person experiences I would love to see us get together at the next annual meeting (MLA or AAHSL) and formally get together to help us connect in person. Overall this was an invaluable experience as a mentor and I look forward to supporting the program in any way I can in the future. Thank you for an incredibly rewarding year! [mentor]
- thank you for the opportunity to serve in this capacity. It was definitely a worthwhile experience. [mentor]
- Try to find more creative ways to engage with the fellow cohort in a virtual environment Try to not leave diversity topics until the end but rather make them included in each session. [fellow]
- Thank you for this incredible opportunity! [fellow]
- AAHSL section should include committee chairs or other board members to talk about the committees. [mentor]

49. If you Know someone who should be contacted about becoming a fellow or mentor, please provide their name and email. [Received recommendations for mentors and fellows]