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## Evaluation of a Trustees Leadership Academy at the Medical University of South Carolina

Elizabeth Pilcher

Kelly Ragucci

Jennie Arial

Monica Cayouette

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# Academic Leadership Journal

## Introduction

Developing leaders in academic medicine has become a priority for many academic health science centers. The increased need for these leaders as well as the desire of individuals on such campuses to enhance their skills in teaching, research and leadership is driving the increase in faculty development programs. (Morahan et al 1998; Rust et al 2006; Muller et al 2006; Wingard et al 2004; Robins et al 2006; Kochar et al 2003; Gruppen et al 2003; Steinert et al 2003; Korschun et al 2007; Richman et al 2001; McDade et al 2004; Dannels et al 2008; Morjikian et al 2005; Bellack et al 2005; Fralic et al 2006) In spite of many similarities, these programs have developed individual goals and objectives in response to various internal needs. While the majority of published literature focuses on physicians and primarily medical education and clinical management skills, some programs are specifically dedicated to under girding the leadership skills of nurses (Morjikian et al 2005; Bellack et al 2005; Fralic et al 2006), minorities (Rust et al 2006) and women. (Richman et al 2001; McDade et al 2004; Dannels et al 2008) The overarching conclusion from the evaluation of these programs is that there is a positive benefit resulting in faculty members who are able to train others to meet contemporary practice and research needs and who have the leadership skills to facilitate educational change and improvement in the academic medical environment. The basis of leadership is the ability to gain perspective on what needs to be accomplished combined with the capacity to positively influence the mind-set of others to execute the plan. Managers are concerned mainly with how things are accomplished; they get people to perform. Leaders, by contrast, are concerned more with what gets done; they establish the vision or focus for an organization. (Kouzes et al 1987) To develop leadership and organizational skills, Bogdewic et al, state that new ways of conducting faculty development are essential. (Bogdewic et al 1997) Because most development occurs outside of the classroom, a model linking leadership training with challenging job assignments at the faculty members' institution with the aid of a mentor must be developed. Leadership opportunities presented in the workplace and "learning by doing" must be encouraged. Bogdewic compiled a list of important leadership competencies that have been described and published in the literature (Table 1). (Kouzes et al 1987; Covey 1991; Senge 1990; Bennis 1989; Bennis et al 1994) In addition, in 2007, the American Association of University Administrators developed a "paradigm for academic leadership development," stating that the purpose of academic leadership development is to produce academic leaders who have 1) high levels of confidence, determination and integrity; 2) unique abilities for innovation, inspiration and visions; 3) a conceptual sense of organization for success and capacity for action powered by passion; 4) the capacity to step out, reach out, speak out and bring out the best in people. The American Association of University Administrators also offers a discussion of elements that are manifested in participants after they have successfully completed a leadership development program. (Cherif et al 2007) In recognition of the increasing importance of leadership development programs as evidenced by the literature, this paper describes and evaluates a unique interdisciplinary leadership development program at an academic health sciences/biomedical research center.

## The Leadership Academy at the Medical University of South Carolina (MUSC)

In 2006 the MUSC instituted the Trustees Leadership Academy (TLA), so named because the Board of Trustees committed funds and approved the recommendation by the provost to create such an entity. The primary mission of the TLA is to provide a diverse pool of faculty and staff opportunities for formalized leadership training. Students were included in the second year of the program to allow additional diversity and promote the growth of student leaders. The goal of the program is to provide the technical skill and knowledge necessary for faculty and staff to assume major administrative roles in an academic health sciences/biomedical research center. According to the Vice President for Academic Affairs and Provost at MUSC, the impetus for the program was twofold: 1) inspire faculty, improve networking and open the door for collaboration; 2) improve faculty skills, specifically in the areas of financial, legislative and legal issues and enhance overall analytical knowledge about a university environment. Prior to implementation of the program, research was completed regarding other leadership programs in medical centers around the country. A Medline® search was conducted on "leadership programs in medical centers," and the literature was reviewed. In addition, personal interviews were conducted with administrators at other universities that had existing leadership development programs, specifically Emory and Harvard Universities. From the information obtained, a list of topic items was formulated, which included grantsmanship, negotiating skills, conflict management, interviewing skills, budgeting, diversity issues, persuasive communication, teaching evaluation, legal issues, financial management, team building, vision development, assessment strategies, strategic and tactical skills, mentorship, using data to guide decision making, curriculum development, professional faculty development and advocacy of research and scholarly activity. Armed with this list, the deans of each of the six colleges at MUSC (Medicine, Dentistry, Pharmacy, Nursing, Graduate Studies, and Health Professions) were interviewed and asked to rank each item according to importance. The list was narrowed based upon this feedback and became the framework and content for the individual sessions of the TLA. The structure of the TLA was designed to deliver the content in multiple sessions over the course of the academic year. There were no specific expectations that participants would be awarded administrative positions upon completion of the program; however there was an expectation that many individuals would become leaders at the university in the future. Individuals were nominated by the deans at their respective colleges and asked for their interest and availability and were then selected for recommendation to the president of MUSC and to the Board of Trustees. Each department represented by a participant was given a small stipend to help offset some of his or her time and effort involved in the program. The Trustees Leadership Academy accepted 16 fellows the first year and expanded to 21 fellows the second year. The Board of Trustees approved the program in 2006, and the first class was inducted for the 2006-2007 academic year.

The TLA consists of three separate sessions distributed throughout the academic year. During the first year, each session was two and a half days long with two of the sessions occurring off campus. In response to participant feedback from year one, the sessions were reduced to two days each, and all sessions occurred on campus during the second year. Each session included a variety of speakers not only from MUSC but also from a local liberal arts college, the College of Charleston and from the Charleston School of Law. Speakers were asked to create interactive sessions based on their areas of expertise on a wide a range of topics. The first session of the TLA was designed to encompass legal issues that arise in an academic health sciences center and offer strategies for handling these issues. This session included an examination of methods to avoid litigation, a brief overview of the American judicial system, and a review of federal regulations concerning employment in a university

setting, rights of students and compliance issues. In addition, participants discussed actual cases that occurred at other universities that could be relevant to employees and students at MUSC. The faculty for this session consisted of attorneys and law professors from the Charleston School of Law, counsel from MUSC, a humanities scholar-in-residence at MUSC, and an invited guest speaker from Stetson University. The second session focused on legislative issues and financial management to inform participants of legislation that may directly or indirectly affect them and to enable participants to understand the way fundraising is accomplished and the impact of funding development. The participants explored the impact the economy of the state can have on higher education and the medical community. In addition, models of health care reform, the future of medical funding and opportunities for research were discussed and evaluated. As part of this session, TLA participants were also invited to attend university budget hearings. Speakers for this second session included top MUSC administrators and finance leaders, state legislators, leaders from the state commission on higher education and state hospital association as well as leaders from physician practice groups. During Session III, Administrative and Interpersonal Skills, participants discussed methods to set quantifiable objectives when assessing performance, strategies to deal with difficult employees, and ways to assess personal strengths and weaknesses. In addition, best practices for developing strategic vision and planning were reviewed and discussed. The speakers for this session consisted primarily of faculty from a nearby college's School of Business and Economics. A Professor of Psychiatry taught the section on interpersonal skills. Although each session was slightly different in terms of overall cost, it should be noted that MUSC reserved \$6,000 per session to pay for speakers, food, and room reservations.

In addition to participating in the three sessions, TLA participants are expected to complete a project, chosen by the fellow but approved by the provost that benefits the individual's college or MUSC or both. Participants are encouraged to be creative by selecting a project that allows them to combine what they have learned in the sessions with their own interests. They can work independently or collaborate with another member of the TLA. When each project is complete, it will be presented to the university community and to the Board of Trustees, and when appropriate, disseminated publicly. The final requirement for the TLA is a capstone experience, an additional leadership development program or activity that occurs outside of MUSC, following graduation from the TLA. The Office of the Provost approves and provides financial support for this capstone experience for all individuals who have completed the Academy. Although there are descriptions in the literature of other leadership development programs in academia, this program is unique in that it encompasses six different health care disciplines and includes staff members and students. This approach enriches the experience for all members and parallels interprofessional initiatives of the South Carolina higher educational system.

#### Method of assessment

A survey was designed to assess the effectiveness of the TLA after the first two years. The goal of this assessment was to determine benefits of this experience for the TLA graduates and to evaluate strengths and weaknesses to refine the program for future years. The 48-question, web-based survey contained six questions pertaining to demographics and 10 questions summarizing academic rank and administrative experience both before and after attending the TLA. Eight short answer questions were asked relating to the overall value of the program. Four questions were asked about each of the three sessions that are conducted throughout the year to provide feedback about which aspects of the sessions were most valuable and which were least valuable. Seven questions were asked about the

project component of the Academy and three questions were asked relating to the capstone experience. Finally there were two open-ended questions that asked for feedback on overall format and content of the Academy.

The survey was pilot tested by a small group of TLA graduates. Institutional review board approval was obtained for this research, and the survey was distributed through a university website. TLA fellows were contacted by email over a 2-month period to complete the survey, and they also received a personal request from the provost to participate in this survey. A copy of the survey is available upon request from the primary author.

## Results of the first two years

The first year the MUSC TLA program consisted of sixteen Fellows and the second year twenty-one. Thirty-one surveys were completed, resulting in a response rate of 84%. Of those who responded, the participant demographics were fairly consistent between the two cohorts. Participants ranged in age from 34- to 56 years with an average age of forty-four in the first cohort and forty-five in the second. The average number of years in service to the university was 14.9 for the first group and 12.6 for the second. With regard to gender, of the 16 participants in the first cohort, 12, or 75%, were women, and 12, or 57%, of the 21 participants in the second cohort were women. Consistent with the participant percentages, more women than men responded to the survey. (see Figure 1). While promotion is not a specific goal of the TLA, 36% of the first cohort reported a promotion and corresponding title change one year after completing the Academy, compared to a 4% average for the university (Figure 2). While this figure reported by the TLA seems exceedingly high compared to the university rate, it is thought that the respondents may have reported a change in job title or duties on the survey as well as an actual promotion in academic rank. It is also thought that perhaps, because of their potential for leadership, the participants chosen for the TLA may have been slated for promotion already. No promotion and title changes were reflected in cohort for year two but this group completed the survey shortly after graduation from the academy. Tenure status was also assessed, and the percentage of TLA participants who were tenured faculty members increased from 19.4% to 25.8% over this two-year period. The percentage of faculty overall at MUSC with tenure at this time was 22%. Twenty-two percent of the survey respondents reported that they had accepted a leadership position in part because of what they learned in the TLA. More importantly, a significant percentage (91% for year one and 73% for year two) reported an increased desire to grow and excel as a leader because of the TLA experience. Ninety-three percent of the TLA Fellows reported that they had increased their understanding of complex university issues and 90% percent felt that they were better qualified to be a leader as a result of attending this program. Eighty percent of the graduates reported an increased ability to work with interprofessional teams; a particularly significant finding because the focus of the university's ten-year reaccreditation plan is interprofessional education. Faculty must understand the dynamics and characteristics of teamwork not only to be effective team members but also to teach the skills necessary for successful team building to future health care practitioners and biomedical scientists

## Evaluation of individual sessions of the program

### Session #1 Legal and Ethical Issues in Higher Education

TLA graduates reported that this session was appropriate for them (87%) and that it was of value

(90%). The guest speaker, an attorney from Stetson University, described rights and responsibilities of universities when dealing with the millennial generation, and his talk was well received. Understanding the culture of students now entering graduate education, legal issues about employment, and the accountability of universities to their students were cited as the most valuable topics. Respondents commented that the least valuable portion was the information about the court system, and they objected to the lecture only format. One respondent commented, "I would have enjoyed a case study approach or similar format to allow us to engage around key issues and to debate the merits of various approaches".

## Session #2 Legislative Issues and Financial Management for Health Administrators

The TLA graduates reported that the topics for this session were both appropriate (90%) and of value to them (90%). The comments from the TLA graduates were favorable, and the majority enjoyed the degree of interaction throughout the sessions. One respondent commented, "This was one of the best sessions of the three. The speakers were, for the most part, dynamic...involved the group in interactive scenarios (allowed the group to get to know one another better) ...and really helped me understand the underpinnings of the university". Several comments expressed appreciation for the opportunity to get to know the leaders of the university and state. In addition, there were positive comments regarding the presentation on state demographics and the relationship to higher education as well as on the topic of the way money flows through an academic institution. Of less value to the respondents was information on the Commission on Higher Education and the update on the legislative agenda. Again respondents rated presentations in lecture-only format of lower value.

## Session #3 Administrative and Interpersonal Skills

Survey results indicated that the majority of individuals considered this session to be appropriate (87%) and of value (84%). These values were lower than the scores for the other two sessions, and the comments reflect slightly less enthusiasm for these topics and speakers. Respondents commented that the most informative presentations were those that were most interactive, but they also added that many lacked depth and breadth. To quote one respondent, "Although the topic is an important one, the speakers in general spoke in generalities. I didn't walk away with any real tangible lessons that I could apply". The section on interpersonal skills was viewed by several to be self-explanatory.

## The TLA project

The summative evaluations from participants in both years one and two indicate a desire for increased guidance related to the structure of the projects and a timeline for completion. In response to these comments, selected attendees from year one and two presented their chosen projects to the third year class, the 2009 TLA. These presentations and subsequent facilitated discussions provided clarity and relieved anxiety about the required endeavor to the current members. Of the 31 surveys returned, 18 TLA participants identified their projects. The majority of participants selected topics that related to finance, education, and support of MUSC initiatives. The projects associated with finance include an examination of billing based upon nursing intensity and capital equipment planning, and the education projects range from an evaluation of learning outcomes in distance learning to a collaborative work effort among nursing programs at MUSC, the University of South Carolina, and Clemson University, the primary three research, graduate institutions in the state. Four projects revolved around supporting ongoing MUSC initiatives, including the integration of inter-professional education on the campus and

identification of quality performance indicators for pharmacy services. It was interesting to note that while the majority of the 2006-2007 cohort focused on projects related to educational endeavors, the majority of topics chosen by the 2007-2008 cohort were decidedly financial in nature. Perhaps, the preference for financially driven projects reflected the economic downturn and urgency to maintain fiscal solvency in academic health science centers at that time.

## The Capstone Experience

While only five participants had completed their capstone experience at the time of this survey, 20 others were planned (Figure 3). Because the program allows maximum flexibility in the type of capstone experiences chosen, there is no deadline for completion. Many off-campus programs are not offered on a routine basis, and off-campus leadership shadowing takes much time to coordinate and plan. Some of the programs chosen or planned for the capstone experience include [American Association of Colleges of Pharmacy](#), [American Dental Education Association Leadership Institute](#), [Crucial Conversations](#), [Executive Leadership in Academic Medicine \(ELAM\)](#), [Harvard Executive Leadership](#), [Harvard Health Care Administration](#), [Harvard Macy Institute](#), [Higher Education Resource Services \(HERS\) Institute](#), [National Library of Medicine/ Association of Health Sciences Libraries Fellowship](#), and the [National Institute for Program Director Development](#). Participants also created various shadowing experiences with university administrators at other institutions and state administrative offices.

## Discussion

### Suggested Changes and Improvements

The last two questions on the survey were open-ended and asked participants to provide feedback on ways to improve the program. The first question asked participants to offer suggestions for improving the format including types of presentations and location. First and foremost, participants requested more interactive exercises, rather than lectures only, in each of the sessions. Individuals wrote that case studies might aid in synthesizing and applying the information learned. In addition, these exercises would enable individuals to get to know each other better and improve communication within the group. The group surveyed did not believe that the format of the TLA allowed enough time for these interactive activities and the suggestions called for participants to have more opportunities for sharing information with each other and discussing potential projects. The group wanted additional critical thinking activities and contact time. One participant stated, "If these are future leaders, they should be working together, forging alliances across departmental lines and thinking together about university issues." The second open-ended question asked participants to offer feedback on ways to improve program content. An analysis of the data revealed five suggestions. First, participants wanted more explicit guidelines for the projects and the capstone experiences, including more details on specific expectations and timelines. Secondly participants proposed a list of topics that they thought should be emphasized more, including finances in higher education and dispute resolution. Third, participants requested that speakers from multiple institutions be included (perhaps even in a panel format) for the last session. Fourth, it was suggested that a member of MUSC's Board of Trustees speak at one of the sessions regarding expectations from university administration as well as their perception of challenges for the university. Finally, participants wanted the university president or provost not only to speak to the group but also ask for input on situations with which those individuals had struggled. All of these suggestions are being reviewed by the provost and addressed and/or incorporated into

subsequent programs. Changes were made for the second cohort and even more improvements were incorporated for the third. For instance, more interactive sessions and case formats are used throughout each session, and all sessions are now located on the MUSC campus only. Additional time is now devoted to finances in the second session and dispute resolution in the third session. The provost now gives clear instructions on the goals, timeline, and purpose of the yearly projects during the first session and follow up has been more thorough with each individual participant after they complete the program. In addition, past participants now present their projects to current attendees to provide further guidance and instruction. These continued improvements enhance the leadership experiences for those involved, and it is expected that interest in the TLA will increase as a result.

## The Future of the Program

The results of this analysis of the first two years of the TLA indicate widespread enthusiasm for the program. With the literature supporting the need for leadership development in universities and evaluation of this program demonstrating positive results, the continuation of this academy should be encouraged. During a time of economic downturn programs such as these may be eliminated or delayed. Universities must continue to realize the importance of developing and nurturing future leaders to envision and facilitate change. An example of the importance of the TLA to the university is demonstrated by the continued participation of the TLA graduates in major university initiatives in spite of unprecedented state budget cuts. One such initiative is the MUSC Creating Collaborative Care (C<sub>3</sub>), the Quality Enhancement Plan that focuses on interprofessional education. Twenty percent of the faculty members who are involved in this initiative are graduates of the TLA. A product of the C<sub>3</sub> initiative is the Interprofessional Faculty Institute, which provides training for faculty in the design, implementation, and evaluation of interprofessional and advanced teambuilding skills. Twelve percent of the participants in this institute are graduates of the TLA. Another example of a major university initiative is the Presidential Scholars Program, which is designed not only to enrich the academic environment of the university by allowing meaningful interprofessional interaction on a broad range of issues that transcend discipline and professional boundaries but also to educate students and faculty about health care disparities. Forty students are selected each year, and each college has one faculty representative in the program. Twenty five percent of the faculty involved in this program are graduates of the TLA. Quantitative and qualitative data suggest an overall benefit of the TLA with regard to faculty appreciation for interprofessional collaboration and understanding of leadership skills.

## Conclusion

The MUSC Trustees Leadership Program at MUSC gives participants the unique opportunity to interact and network with other faculty and staff within various health care disciplines. The program includes several organizational and design elements that have supported its success. Quantitative and qualitative data suggest a benefit of this particular program with regard to understanding complex university issues and increasing the ability to work in interdisciplinary teams and affirm its continuation. In addition, the program has demonstrated the ability to prepare participants to assume leadership roles and become promoted at the college and university level. Concerted efforts should be made to promote academic leadership academies within universities around the country and to continue to assess long term outcomes of such programs.



**Table 1 Leadership Competencies<sup>16, 18-21</sup>**

<b>Leadership Competencies<sup>16,18-21</sup></b>	
<b>1</b>	Develop a shared vision and direct attention to shared goals
<b>2</b>	Communicate a sense of purpose or meaning in long-range vision and department goals
<b>3</b>	Foster collaboration and cooperation
<b>4</b>	Empower and honor others; value diverse perspectives and talent
<b>5</b>	Establish trust through behavior that is consistent with values and beliefs

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