

PENNSSTATE



**Administrative Fellows Review Committee
Final Report and Recommendations**

**Submitted to Robert Secor
Vice Provost for Academic Affairs**

April 2004

Revision accepted July 8, 2004
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**Administrative Fellows Review Committee
Final Report and Recommendations**

**Executive Summary
April 2004**

In September 2003, Vice Provost for Academic Affairs Robert Secor charged a working group to determine if the fellows program is "*...doing everything we want it to and to ask whether there are ways of improving it and insuring that the best practices of previous fellows and mentors are passed on to those who are to come.*" The report presented here summarizes the process used by the working group to evaluate the program. Included in this report is a review of the program's history; a demographic profile of the fellows; the results of a survey administered to fellows, mentors, and others; and seven recommendations designed to further enhance Penn State's Administrative Fellows Program.

Since 1986 and including the 2003-2004 year, 45 faculty and staff members have served in fellowships under the mentorship of 14 Penn State vice presidents. The rosters of Administrative Fellows and mentors appear in Appendices A and B.

The following seven recommendations are offered to guide the future development of the Administrative Fellows Program and to enhance the fellowship experience for future fellows and mentors. The recommendations appear below in abbreviated form; additional detail on the recommendations is provided on pages five and six and in the appendices.

1. Maintain mutually productive relationships with the Office of the President and the Commission for Women.
2. Better educate deans, vice provosts, associate/assistant vice presidents, unit heads and others about the Administrative Fellows Program with enhanced marketing and recruitment efforts.
3. Develop a formal leadership-learning component for the Administrative Fellows Program.
4. Enrich the fellowship year in a manner that provides consistency and structure across the fellowship experience for fellows and mentors.
5. Better utilize the leadership capacity that exists as a result of the Administrative Fellows Program.
6. Involve the Administrative Fellows network in supporting the Steering Committee and the Vice Provost for Academic Affairs (VPAA).
7. Assess the Administrative Fellows Program on a regular schedule.

**The Pennsylvania State University
Administrative Fellows Review Committee
Final Report
April 2004**

Introduction

In September 2003, Vice Provost for Academic Affairs Robert Secor charged a working group (cover page) to determine if the fellows program is "*...doing everything we want it to and to ask whether there are ways of improving it and insuring that the best practices of previous fellows and mentors are passed on to those who are to come.*" The report presented here summarizes the process used by the working group to evaluate the program. Included in this report is a review of the program's history; a demographic profile of the fellows; the results of a web-based survey querying past fellows, mentors, and others; and seven recommendations designed to further enhance Penn State's Administrative Fellows Program.

This evaluation of Penn State's Administrative Fellows Program comes at the eighteenth year of the program with the first fellow having been named in spring, 1986. Ten years later, in 1996, the Commission for Women sponsored a study to assess the program's success to date. Conducted by Susan B. Shuman, the major goal of the study was to "measure and describe the quality of the fellowship experience as perceived by past and present fellows." Nineteen fellows were interviewed for the 1996 study. Collectively, the interviews affirmed the success of the program and the report offered a recommendation for program reviews on a regular basis.

The 1996 study was supplemented in 1999 with the addition of interviews from seven fellows not previously included. The final report, prepared by Susan Shuman in the Office of the Vice Provost for Educational Equity (April 2000), focused on the quality and importance of the fellows' experiences, along with the personal and professional outcomes of the fellowship.

In a presentation to the Penn State Board of Trustees in January 1998, Vice Provost Robert Secor noted that the Administrative Fellows Program is an example of Penn State's commitment to helping faculty and staff refine their leadership abilities, have access to experiences that broaden their understanding of issues facing the University, and enable increased knowledge of University decision-making. Dr. Secor commented that the "goal of the program is to expand the pool of qualified applicants for positions of leadership, with women and minorities being especially encouraged to apply."

Since 1986 and including the 2003-2004 year, 45 faculty and staff members have served in fellowships under the mentorship of 14 Penn State vice presidents. The rosters of fellows and mentors appear in Appendices A and B.

History of the Administrative Fellows Program

Penn State's Commission for Women provided strong leadership for initiation of the Administrative Fellows Program. In 1984-1985 the Commission appointed a Task Force (Margo Allen, Barbara Copland-Wood, Mary Kay Cote, Dorothy Harris, Cynthia Johnson, Anne Petersen, Elaine Rhodes and Joan Thomson) to develop a fellows program concept. The Task Force presented the Commission with a proposal to initiate an Administrative Fellows Program "to assist women, minorities, and other underrepresented persons to prepare themselves for administrative, managerial, and executive positions" at Penn State (December 20, 1985).

The 1985 Task Force report documented the small numbers of women and minorities holding positions in the higher levels of Penn State's administrative structure. "There is one female college dean, one assistant provost, and one campus executive officer. Minorities are even less well represented with only one on the president's staff, none as deans, vice presidents, or campus executive officers." Further, in a January 1987 proposal to extend the fellows program, Petersen wrote, "the recent analyses of the Strategic Study Group on the Status of Women suggest that women and minorities are less likely to move into such [senior leadership] positions than are majority males."

Penn State President Bryce Jordan announced the establishment of the Administrative Fellows Program in spring 1986. Developed jointly by the Commission for Women and the Office of Human Resources, three major goals were identified:

1. to provide a focused administrative experience for women and minorities with potential talents and interests in university administration;
2. to establish a pool of potential candidates to be considered when administrative positions become available;
3. to increase the representation of women and minorities in administration at Penn State (Anne Petersen memo to CFW Executive Committee, February 2, 1987).

The July 1986 *Intercom* article announcing the program and providing information on the application process noted that the program would enable fellows to gain skills and experiences in a wide-range of learning activities at the highest levels of the University. In turn, these experiences would equip fellows "to handle the demanding challenges of higher education administration."

Also, the same *Intercom* story described some of the expectations for the fellowship experience and that a "learning plan" would be developed between the mentor and the fellow outlining the activities for the year. The "principle guiding the concept of the learning plan is that theory and practice will result in contacts between the fellows and all levels of the University and provide opportunities for the fellows to engage in problem solving and decision making processes."

In 1994-1995, the Office of the President added new financial resources to the Administrative Fellows Program enabling the addition of a third mentor--the senior vice president and dean of the Commonwealth Educational System. The 1998-1999 year began a rotation of mentors and the addition of fellowship opportunities among all vice presidents.

Demographic Profile of Administrative Fellows 1986-2004

In January 1987, the first Administrative Fellow was named. Dr. Patricia Farrell, associate professor of Leisure Studies in the College of Health and Human Development served for eight months with Steve Garban, the Senior Vice President for Finance and Operations/Treasurer. Including the 2003-2004 class of Administrative Fellows, there have been a total of 45 fellows. Appendices A and B provide rosters of fellows and mentors.

- Three fellows are now retired and one fellow is deceased. Six fellows (13 percent) are now engaged in leadership opportunities outside Penn State, though these individuals remained at the University from one to eight years following their fellowship years (mean of 3.6 years). Currently, 35 fellows (78 percent) hold positions at Penn State.
- Of the 35 fellows remaining at Penn State, 11 fellows (34 percent) returned to their pre-fellowship positions or to a promotion in the same unit and eight fellows (23 percent) are classified as executive (1), administrators (3), and academic administrators (4); 21 fellows (66 percent) were promoted into new positions; and three fellows are currently working with mentors.
- Entering the fellowship, 17 fellows (38 percent) were faculty members and 28 fellows (62 percent) held staff positions. Seven fellows (16 percent) were from campus locations prior to the fellowship experience.
- Five of the fellows (11 percent) are male, including the two men in the 2003-2004 class. Twelve fellows (27 percent) are individuals of color.
- Following the fellowship four of the seven fellows from campus locations (57 percent) returned to the location in the same or different position held prior to the fellowship, and three of the campus fellows (43 percent) assumed new positions at University Park.
- Two-thirds (66 percent) of the 45 fellows completed their fellowships with either the Senior Vice President for Finance and Business (15) or the Executive Vice President and Provost (15).
- Fifteen fellows worked with six other mentors:
 - Senior Vice President and Dean, Commonwealth Educational System/(1997-98) Dean, Commonwealth College (four fellows)
 - Vice President for Outreach and Cooperative Extension (three fellows)
 - Vice President for Research and Dean of the Graduate School (three fellows)
 - Vice President for Student Affairs (two fellows)
 - Vice President for Development and Alumni Relations (two fellows)
 - Senior Vice President for Health Affairs and Dean of the College of Medicine (one fellow)

Survey Methodology

The Administrative Fellows Review committee met in late September to discuss the best strategy for surveying fellows, mentors and others to assess their experiences with the program. The Office for Planning and Institutional Assessment had recently acquired software for web surveys. It was decided that a web-based survey would yield the greatest response; committee members would submit survey questions and Michael Dooris, Louise Sandmeyer and Susan Youtz would compile the survey results.

There was agreement among committee members that the survey methodology be submitted for review and approval from the Social Science Research Institutional Review Board (IRB). Committee members noted that by receiving IRB approval study findings could be disseminated at CIC and other higher education conferences and through publication in higher education, leadership, and related journals. The study was approved by the IRB on December 2, 2003 (#17589).

A web-based survey of former administrative fellows, vice presidents who served as mentors, and vice presidents, deans, vice provosts, unit heads, and selected staff who had contact with the Administrative Fellows was conducted during a four-week period in December 2003 and early January 2004.

Study participants were asked by an electronic invitation letter to respond to questions in a web-based survey that took approximately 15 minutes to complete. Participants were told that their participation was voluntary, their responses were confidential and that a participant's name or title would never be associated with a survey response. Participants were asked to indicate their agreement to participate in the survey by clicking on a radio button next to the statements "I agree" or "I do not agree."

Three web-based surveys, one each for administrative fellows, mentors, and deans; vice presidents, vice provosts, unit heads, and selected staff were utilized. The invitation letter, informed consent statement, surveys, and summary of survey responses may be found in Appendices C, D, E, and F. A total of 79 web surveys were distributed. The overall response rate was 50 percent---with 65 percent of fellows responding; 50 percent of mentors; and 37 percent of vice presidents, deans, unit heads, and others.

Recommendations

Following an analysis and consideration of survey responses, the following recommendations were developed to guide the Administrative Fellows Program in the future and to enhance the fellowship experience:

1. Maintain mutually productive relationships with the Office of the President and the Commission for Women.

The main reason the Administrative Fellows Program has been so successfully institutionalized at Penn State is the support it has enjoyed at the highest levels of the institution. Joint sponsorship by the Office of the President and the Commission for Women keeps the program in the spotlight as an organizational priority for the professional development and advancement of women and minorities. This mutually beneficial relationship must continue to be nurtured as the program evolves. Continuing the existing practices of having the current fellows meet with the President and make reports to the Commission for Women will facilitate this recommendation.

2. Better educate deans, vice provosts, associate/assistant vice presidents, unit heads and others about the Administrative Fellows Program as a professional development opportunity for identified leaders in their areas. With enhanced marketing and recruitment efforts, the recruitment of potential candidates will be facilitated. Appendices G and H offer further elaboration on program marketing and recruitment.

- Develop a print brochure and expanded web site
- Target specific University populations for recruitment
- Increase public recognition of fellows' key achievements
- Assessment of marketing and promotional materials

3. Develop a formal leadership-learning component for the Administrative Fellows Program.

As the selected candidates enter the fellowship year, they possess varying levels of leadership knowledge and experience. The Committee believes that new Administrative Fellows would benefit greatly from being exposed to literature and/or seminars on leadership. Appendices J and K provide additional information on leadership development programs and activities at three fellowship intervals, i.e., pre-fellowship, mid-fellowship, and capstone fellowship experiences.

4. Enrich the fellowship year in a manner that provides consistency and structure across the fellowship experience for fellows and mentors.

So that all fellows have the opportunity for broad and robust experiences, the following materials were developed as resources for both fellows and mentors:

- a. **Mentor and Fellow Checklist:** Appendix I provides a suggested list of key activities to guide the mentor and fellow. This checklist is especially helpful in clarifying role expectations for the mentor and the fellow. Also, this material will be helpful to prospective and new mentors.

- b. **Suggested Core Experiences:** To ensure the quality and continuity of experiences for all fellows, there is a set of core activities and meetings that have proven beneficial for learning more about the University and how administrators lead the organization. Appendix L provides a list of these suggested core experiences from which fellows may choose.
- c. **Projects:** Many fellowships have been enriched by the fellow and mentor agreeing on a project(s) that allows the fellow to become more fully integrated and involved in the mentor's administrative unit or to become involved in a university-wide initiative. Appendix M provides a list of projects undertaken by previous fellows that may be used to generate ideas for projects for current fellows.
- d. **Coaching by Former Fellows:** Former fellows can serve as coaches or guides to current fellows by providing invaluable information and advice throughout the fellowship year.

5. Better utilize the leadership capacity that exists as a result of the Administrative Fellows Program experience.

The pool of former fellows offers a richly seasoned collection of experiences and perspectives from which the University community can benefit. Appendix N provides a sample of how former fellows have provided leadership and service to the University following their fellowships. This array of experiences provides a foundation for identifying current opportunities for former fellows to be further engaged so the University continues to benefit from its investment in this program.

6. Involve the Administrative Fellows network in supporting the Steering Committee and the Vice Provost for Academic Affairs (VPAA).

As the network of Fellows has grown to a substantive number, along with the breadth and depth of experience represented in the group, these strengths have the potential to be significant resources to the future of the Administrative Fellows program. Specifically, Fellows are well-positioned and have the knowledge necessary to assist the VPAA and the Steering Committee in the following areas:

- Assist in the development of leadership programs and readings.
- Participate in the new fellows' orientation program.
- Provide nominations for the Steering Committee.
- Other areas as requested by the VPAA and Steering Committee.

7. Assess the Administrative Fellows Program on a regular schedule.

Part of the success of the Administrative Fellows Program at Penn State can be attributed to the continued refinement of the program by past fellows and friends of the fellowship program. The University is dynamic, and this premier leadership development program must evolve with the shifting landscape of higher education. To ensure the program remains vital and effective, a formal assessment must be conducted on a regular schedule (every three to five years).

Appendix A

Directory of Administrative Fellows

April 2004

1986-87

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Appendix B

Mentors 1986-2004

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Steve A. Garban, Senior Vice President for Finance and Operations/Treasurer Emeritus

Charles L. Hosler, Executive Vice President and Provost and Senior Vice President for Research and Dean of the Graduate School Emeritus

Darrell G. Kirch, Senior Vice President for Health Affairs and Dean, College of Medicine

Rodney P. Kirsch, Vice President for Development and Alumni Relations

Eva J. Pell, Vice President for Research and Dean of the Graduate School

William C. Richardson, Executive Vice President and Provost

James H. Ryan, Vice President Emeritus for Outreach and Cooperative Extension

Gary C. Schultz, Senior Vice President for Finance and Business/Treasurer

Joseph C. Strasser, Dean, Commonwealth College (1997-1998)

James M. Wagner, Vice President Emeritus for Business and Operations (1993-1995)

Appendix C

Letter of Invitation to Participate in the Online Survey

December 2003

Colleagues:

Penn State's Administrative Fellows Program was initiated in 1986 as a collaboration between the Office of the President and the Commission for Women. Since that time, 42 Penn State faculty and staff members have completed fellowships under the mentorship of 12 Penn State vice presidents.

The Administrative Fellows Program provides professional development opportunities for faculty and staff. Serving under the mentorship of a senior-level administrator, fellows have opportunities to broaden their perspective and experiences in higher education administration. The fellowship experience is designed to help participants become more effective in their existing positions at the University and position fellows to compete for positions at higher levels of administration in the future. Although participation in the program does not guarantee appointment to an advanced or administrative position at the University, the program has been valuable in increasing the pool of qualified women and minorities interested in pursuing careers in University administration.

The purpose of this letter is to invite your participation in an evaluation of the Administrative Fellows Program. Vice Provost for Academic Affairs, Robert Secor, has charged a small working group (see below for committee roster) to determine if the fellows program is "*...doing everything we want it to and to ask whether there are ways of improving it and insuring that the best practices of previous fellows and mentors are passed on to those who are to come.*"

You are asked to respond to several open-ended questions in a web-based research survey that should take no longer than 15 minutes to complete. Your participation is voluntary and your responses are confidential. Your name or title will never be associated with your survey response.

After the web surveys are completed and analyzed, it is anticipated that a small sub-set of survey respondents may be invited to participate in an interview. Individuals selected for interviews will in no way be identified with their individual survey responses. The results of this study will only be reported in aggregate form; no individual responses will be reported.

This study will be used to strengthen and further enhance Penn State's Administrative Fellows Program. Thank you for your participation and if you have questions, please contact Susan Youtz (863-0221) or Michael Dooris (863-8721).

Administrative Fellows Review Committee:

Lydia P. Abdullah, Senior Budget Planning and External Reporting Specialist, University Budget Office

Josephine M. Carubia, Chief Academic Liaison Officer, College of Medicine

Renee D. Diehl, Professor of Physics, Eberly College of Science

Nancy L. Herron, Associate Dean for Academic Programs, Commonwealth College

Janis E. Jacobs, Vice Provost for Undergraduate Education and International Programs

Bonnie J. MacEwan, Assistant Dean for Collections, University Libraries

Louise E. Sandmeyer, Executive Director, Office of Planning and Institutional Assessment

Susan J. Wiedemer, Coordinator, Financial Analysis and Cash Management, Office of Corporate Controller

Susan C. Youtz, Executive Secretary, University Faculty Senate, **Committee Chair**

Appendix D

Statement of Informed Consent (IRB # 17589)

The purpose of this research is to evaluate Penn State's Administrative Fellows Program. You will be asked to answer several survey questions. There are no unusual risks in participating in this research. The information gathered can provide a better understanding of the program and possibly lead to future improvements.

It will take about 15 minutes to complete the survey. The survey does not ask for identifying information and your name or title will never be associated with your response to the survey. Our intent is to maintain confidentiality to the extent permitted by the technology used, though no guarantees can be made regarding the interception by any third parties of data sent via the Internet.

Once the web surveys are completed and analyzed, a small sub-set of survey respondents may be invited to participate in an interview. Individuals selected for interviews will in no way be identified with their individual survey responses. If you are invited to participate in an interview, you will be asked to sign another statement of informed consent.

The results of this study will only be reported in aggregate form, and no individual responses will be given. Your participation in all or part of this survey is voluntary, and it is not necessary for you to answer every question. You will receive no compensation for participating in this study.

If you have questions about the research, please contact Susan C. Youtz at the University Faculty Senate, (814) 863-0221 or Michael J. Dooris in the Office of Planning & Institutional Assessment, (814) 863-8721. If you have questions about your rights as a study participant, please contact Penn State's Office for Research Protections at (814) 865-1775.

Completion of the survey implies that you have read the information in this form and that you consent to participate in this research.

Please print a copy of this Statement of Informed Consent for your records.

Please indicate your agreement to participate:

I agree

I do not agree

Reset

Submit

This informed consent form was reviewed and approved by the Office for Research Protections at The Pennsylvania State University on (12/02/03 MBB). It will expire on (12/01/04 MBB).

Appendix E

Online Survey for Mentors

1. As a mentor, what were your expectations for the Administrative Fellows Program?
How were they met or not met?

2. What was your most valuable learning experience as a mentor?

3. What were the greatest challenges for you as a mentor?

4. How can the Administrative Fellows Program be improved?

5. What core qualities/attributes/attitudes of an Administrative Fellow enhance the experience for all parties?

6. The Administrative Fellows Program is a valuable tool for building leadership capacity.
(Rate on a scale of 1-5)

1 Disagree	2	3	4	5 Agree
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7. Other observations:

Online Survey for Administrative Fellows

1. What were your expectations for the fellowship experience when you applied?

2. How did the fellowship meet your expectations? How were your expectations not met?

3. What was the most valuable learning experience in your fellowship year?

4. How can the Administrative Fellows Program be improved?

5. What core qualities/attributes/attitudes of an Administrative Fellow enhance the experience for all parties?

6. The Administrative Fellows Program is a valuable tool for building leadership capacity. (Rate on a scale of 1-5)

1 Disagree	2	3	4	5 Agree
---------------	---	---	---	------------

7. Other observations:

Online Survey for Others

1. What type of interactions have you had with Administrative Fellows? Check all that apply.
- Interviewed by a fellow
 - Participated on a committee with a fellow
 - Traveled with a fellow
 - A fellow was employed in my work unit (If checked, please describe how the fellow has contributed to the unit since the fellowship)

— Other _____

2. How can the Administrative Fellows Program be improved?

3. What core qualities/attributes/attitudes of an Administrative Fellow enhance the experience for all parties?

4. The Administrative Fellows Program is a valuable tool for building leadership capacity. (Rate on a scale of 1-5)

1 Disagree	2	3	4	5 Agree
---------------	---	---	---	------------

5. How should Penn State build leadership capacity for women and underrepresented groups?

6. Other observations:

Appendix F

Summary of Survey Responses

Overview of Data Analysis: Using accepted qualitative data analysis techniques, survey responses were reviewed and patterns, themes, and other common response threads were identified. In most cases, bulleted items reflect multiple responses in all response categories.

There was a notable convergence of response among all three categories of respondents---fellows, mentors, and others. On occasion, a single response or a quote was so compelling or seemed to warrant additional discussion that it was included in this summary.

Overall Response Rates:

Total Surveys Distributed: 79

Fellows: 65% response

Mentors: 50% response

Other: 37% response (deans, vice provosts, unit heads, etc.)

Administrative Fellows' Responses

I. Expectations:

- Learn about the University
- Learn about decision-making
- Observe leadership styles/develop leadership skills
- Learn about budget process and strategic planning

“I wanted to learn as much as possible about how the University works.”

“I wanted to observe how decisions were made at the highest levels of the University.”

“I presented my expectations, in writing, to my mentor.”

II. Expectations met/not met:

- Met all expectations; met most expectations
- Wanted more time with mentor
- Hoped to participate more in decision-making
- Disappointed that some areas were “off-limits”
- Wanted to receive more challenging assignments

“ I expected that my mentor would have been more involved in helping me reach my goals, I quickly found out that it was up to me.”

“Nothing in my fellowship was off-limits, opportunities were always available or provided upon request.”

“My expectations were met through excellent mentoring and exposure to the breadth of the University.”

“I hoped to be held accountable through challenging assignments, this expectation was not met.”

“No one should be led to believe that this is a year of “free time.”

III. Most valuable experience:

- The one-on-one time with my mentor
- Interacting and getting to know senior administrators
- Gaining new insights and understanding

“Learning to think more strategically...”

“Leaning about the critical role that Development plays in the life of Deans...”

“I learned to listen in a way that I was not accustomed to doing.”

“I learned that it was OK to ask for what you want!”

“Attending NASULGC and AAHE meetings, as well as visiting several campuses...”

IV. Improving the Fellows’ Program:

- Participate in areas outside mentor’s organization
- Attend professional meetings
- Provide mentors with guidance
- Offer a “fellowship curriculum,” add targeted, focused learning experiences
- Have former fellows serve as a coach/guide to current fellows; develop a “buddy” system
- Strengthen post-fellowship connections
- Have mentors and fellows establish goals for the year; revisit goals at least twice during the year

“I wish I had been bolder about exploring more areas.”

“Give the fellow a true leadership requirement, have the fellow serve as a chair...”

“Include challenging assignments with leadership development activities.”

“Strengthen the pre, during, and post-fellowship activities.”

V. Core qualities and attitudes of Fellows:

- Curiosity
- Flexibility
- Strong communication skills
- Openness to new ideas/experiences
- Willingness to participate and learn
- Good listener
- Strategic thinker

“The fellowship is more like a capstone experience; it’s not very productive if the person is too junior in his/her career.”

“Willingness to learn versus the need to be seen or heard...fellows should be there to learn.”

“A commitment to quality and diversity, able to step outside the box.”

“Be open to all possible experiences.”

VI. Other observations:

- Outstanding experience; significant highlight of career
- Grateful for opportunity
- Changed career path; new level of confidence
- Encourage colleges and other units to consider a mid-level and smaller scale fellow’s program

“What we gained in insight and wisdom from the fellowship needs to be used more by the University. We can contribute more than what we do as a group.”

“Fellows should be routinely tapped for search committees, University-wide committees, AD 14s, the program represents a rich human resource data base for the University and should be utilized as such.”

“Insights gained heightened my pride in being part of the University and enhanced my desire to contribute on the University’s administrative team.”

“It would be helpful to include training opportunities for the fellows in the area of leadership and problem solving. Some fellows attend the CIC academic leadership program, some attend the Academic Leadership Forums, I think all fellows should be able to participate in these programs.”

“The support of the Trustees is key to this program, an annual report and presentation by the fellows should be given to the Trustees. Former fellows should be used as a recruitment and retention tool.”

Mentors’ Responses

I. Expectations:

“Generally my expectations were met. On one occasion the pool of applicants was not as strong as I would have liked.”

“My expectations were bilateral. I looked forward to the opportunity to teach my fellow about dimensions of leadership they had not encountered. At the same time, I had hopes that the fellow would become an active contributor to organizational efforts.”

“I expected that my fellows would be actively engaged in my organization and they were.”

“My expectations were substantially met. I wanted to teach and learn from the fellows; I hoped to use the fellows background in my organization; wanted to help with the fellow’s career development.”

II. Most valuable experience:

- Appreciated fresh perspective
- Surprised and gratified at how quickly fellow learned
- Listening to fellow provide feedback; observing fellow absorb and appreciate complexities

“It was an opportunity for me to do some reflection on my decision-making and organizational direction as the fellow questioned me.”

III. Greatest challenges:

- Helping the fellows to get the most from the fellowship
- Finding sufficient time to interact with the fellow
- Identifying meaningful special projects for both of us
- Assuring substance in our interactions
- Being mindful that fellow is not a staff member

IV. Improving the Fellows’ Program:

- Maintain a high quality applicant pool, continue to rotate mentors
- Provide structured professional development opportunities
- Consider modest expansion to 4-5 fellows per year
- Mentor and fellow should agree in writing what the anticipated outcomes of fellowship should be

V. Core qualities and attitudes of Fellows:

- Curious, flexible, self-starting
- Open, mature, self-confident, able to handle ambiguity
- Sense of humor, significant University experience
- Serious work ethic, enthusiasm

VI. Other observations:

“It concerns me that some fellows may feel the experience was not a success if they return to their original units or if they don’t get promoted after the fellowship year. There is pressure (self-imposed and external) on fellows as they reach the end of their fellowship to “break-out” into a new and different role. It’s wonderful when that occurs, but it shouldn’t be thought a failure when it doesn’t.”

Others' (deans, vice provosts, unit heads, etc.) Responses

I. Improving the Fellows' Program:

- Include a core curriculum or assigned readings
- Require fellows to complete a project that would benefit the University
- Add skills workshops on organizational theory and dynamics, supervision, motivation
- More consistency/standardization is needed in the program
- There are uneven outcomes among fellows...every fellow approaches fellowship differently
- Fellows could be given more substantive jobs and expected to have more substantive interactions
- Selection of fellows should focus on people who have the capability
- Perhaps add a dean as a mentor

“Have “sending unit” be more knowledgeable about the fellows’ projects.”

“It is entirely possible that the fellowship experience will allow the fellow to tackle his or her old assignment with renewed vigor. Fellows are sometimes made to feel that they MUST seek a new path.”

“The fellows who seem to get the most out of it are the ones that take on one or more specific projects. So, it may be wise to tell the mentors that they should help the fellow look for a project (late in the fall semester or early in the spring).”

“Prior to the individual meetings that many fellows have with deans, have the fellow prepare a brief summary of personal goals, background and experience that will give the deans a context to meet with the fellow.”

“There is no direct commitment for administrative responsibilities after the fellowship is over. More consistency in the program and some sort of continued role afterward would be desirable.”

II. Core qualities and attitudes of Fellows:

- Intelligence, writing skills, sense of humor, recognition that one is learning rather than running things
- Willingness to explore new things—ability to get along with others
- Inquisitive, active, participatory
- Flexible, capable of hearing “no, you can’t attend that meeting,” good listener
- Evidence of leadership capability, collaborative style, some administrative responsibilities

“It clearly works if the person is a self-starter—someone who goes after experiences, sees opportunities and makes the most of them.”

“There are lots of smart, articulate, intellectually impressive and appropriately aggressive people with a deep commitment to higher education at Penn State. The fellows should be recruited from among those people. They also need enough experience so they can soon be comfortable in the environment and make contributions.”

III. Building leadership capacity for women and underrepresented groups:

- Program is effective, appropriately run, and utilizes a commendable approach
- As program currently exists, fellows are observers, limited use of leadership skills. Program seems too tied to the personal relationships between fellows and mentors. Participants don't know what they don't know.
- Program could be operated in selected college, open up doors for women and underrepresented groups to gain administrative experience that is closer to their academic disciplines.

“I think that the track record of the fellows suggests that we are using this pool of talent as much as possible.”

“We build expectation for new opportunities and then women and minorities have to leave Penn State to take advantage of what they have learned.”

IV. Other observations:

- Stronger recruitment of candidates is necessary; the application process for the program should be more aggressive.
- Program is more mentoring than training or management oriented. Fellows could benefit from new HR management series

“The program needs to move from being passive and nice to being more demanding.”

“There needs to be a systematic mix of experiences including administration, management, and leadership.”

“There was no comparable program at my previous university, I think Penn State has taken a bold step forward by developing and supporting this program.”

In response to the statement (scale 1-5; one=disagree; five =agree), “The Administrative Fellows Program is a valuable tool for enhancing leadership capacity, ” the following responses were received:

- Nearly three-fourths (73 percent) of the responding mentors agreed with the statement at a ranking of four or five.
- Eighty-seven percent agreed with the statement at a ranking of four or five.
- Nearly two-thirds (63 percent) of the responding individuals in the “Other” category agreed with a ranking of four or five and 27 percent gave a mid-scale designation of three.

Appendix G

Marketing and Recruitment Recommendations (See Recommendation #2, Page 5)

- **Develop a print brochure and expanded website for the Administrative Fellows Program**
A print brochure and an expanded Web site serves many purposes; such as providing information to attract prospective candidates, offering professional development opportunity during the performance review process, and increased visibility and identity of the Administrative Fellows Program. See Appendix H for suggested brochure content.
- **Target specific University populations for recruitment**
Guided by an Advisory Committee, the Administrative Fellows alumni will contact and follow up with deans and department/unit heads to encourage them to develop leadership capacity among unit personnel by inviting one or two high achieving individuals each year to apply for the Administrative Fellowship.
- **Increase public presentations of key achievements of Administrative Fellows**
Each year, at a minimum, the Administrative Fellows capstone experience may be presented at a reception for the relevant Deans and/or supervisors and other invited guests. This report and any future reports on the Administrative Fellows Program should be presented to the Academic Leadership Council and the Commission for Women. Guided by an Advisory Committee, the Administrative Fellows Alumni may develop a “signature program” as a contribution to building the leadership capacity of current and past fellows and others at the University.
- **Continue ongoing assessment of marketing and promotional materials**
Guided by an Advisory Committee, marketing and promotional materials and strategies should be assessed frequently to better achieve the goals of the Administrative Fellows Program in alignment with the goals of the University.

Appendix H

Print Brochure Content Recommendation (See Recommendation #2, Page 5)

Penn State Administrative Fellows Program

Established in 1986 by Penn State's Commission for Women, the Office of Human Resources, and the President's Office.

Statement from President Spanier (excerpt from web brochure)

Introduction

The Administrative Fellows Program provides unique executive-level professional development opportunities for mid-career or senior faculty and staff with standing appointments. Under the mentorship of a Penn State vice president, three Administrative Fellows per year receive opportunities to broaden their perspectives and experiences in higher education administration. The fellowship experience is designed to allow the participants to become more effective in their existing positions within the University and to provide a base for them to compete at higher levels of administration for advancement in the future.

Program Objectives

The objectives of the Administrative Fellows Program are to identify faculty and staff who have potential for effective leadership; to increase awareness of the complexity of issues facing higher education and to enhance understanding of the environment in which decisions are being made; and to provide opportunities for participation in a wide range of decision-making processes, learning activities, and program management that provide a better understanding of the challenges of higher education leadership.

Although participation in the program does not guarantee appointment to an advanced or administrative position at the University, the program has been valuable in the past in increasing the pool of qualified women and minorities interested in pursuing careers in University administration.

Selection Process

A call for nominations is published in *The Intercom* late in the fall semester. Applications are available at <http://www.psu.edu/oldmain/vprov/> or from the office of the Vice Provost for Academic Affairs who administers the program. Applications are typically due in mid January; interviews are held in February; and selection announcements are made in April or May.

Content of Program

The Administrative Fellowship consists of an experience balanced among three components of (a) new learning based on a structured leadership-learning curriculum; (b) broad and deep experience at the highest levels of University leadership; and (c) reflection, discussion, and synthesis of learning and experience throughout the fellowship and with a capstone project or presentation.

Brochure Content (continued)

Administrative Fellows Leadership-Learning Curriculum (sample)

- Financial management and budgeting
- Leadership challenges for women and minorities
- Career development in higher education leadership
- Organizational theory, structures, and core processes
- Strategic Planning

Demographic Profile of Administrative Fellows Alumni (include)

Benefits of the Program

- A more diverse pool of qualified candidates for University-level positions
- Fresh perspectives reach senior leadership from across the organization
- Internal career advancement opportunity for retention of talent
- Cohort of broadly trained leaders re-enter the organization to mentor and educate others
- Program serves as a catalyst for leadership development across the University

(Selected quotations from web brochure)

For more information or to apply to the Administrative Fellows Program:

(contact names and information)

Please refer to the following Web site for full web brochure:

www.psu.edu/oldmain/vprov/Admin%20Fellows/brochure.pdf

Appendix I

Mentors and Fellows Checklist (See Recommendation 4a, Page 5)

To ensure that the fellow is having varied and robust experiences, it is important for the mentor and fellow to meet regularly to discuss goals and objectives for the fellow. These checklists are provided to guide the mentor and the fellow in having a productive fellowship year.

A Checklist for Mentors of Administrative Fellows

- Meet with the fellow soon after he or she is appointed
- Provide information about your office, work style, expectations
- Introduce the fellow to staff
- Discuss and clarify the nature, amount and parameters of staff support available to the fellow
- Provide or arrange for written information, keys, etc.
- Arrange for the fellow to see their office and make arrangements for anything needed in the office
- Provide or arrange for information about financial arrangements such as travel expenses
- Share background information, skills and experience
- Set up regular meeting times and include some informal times such as lunches
- Discuss and agree about confidentiality of the information shared with the fellow and by the fellow
- Be clear about what the fellow can and cannot do and what you can do as the mentor
- Share information about position responsibilities and offer to share your expertise by inviting the fellow to exchange information at a specific level. For example, invite the fellow to attend a meeting with you and contribute in a specific way
- Spend an early meeting time discussing the fellows professional goals and their hoped for outcomes of the year as a fellow
- Invite the fellow to meetings that may be of interest to him/her and discuss which meetings will be useful
- Review the strategic plan and talk about the University and your office as an organization and a culture
- Provide specific and general suggestions regarding professional development opportunities
- Share information about the University and Higher Education. This may include suggesting readings or conferences to attend
- When possible make connections with administrators at other Universities
- Review the list of core experiences outlined for each fellow at <http://www.psu.edu/oldmain/vprov/Admin%20Fellows/guidelines.htm> and make sure she/he is taking full advantage of the opportunities outlined in the program
- Give advice on handling the workload and job responsibilities
- Encourage the fellow to prepare for each experience by providing opportunities for him/her to prepare for new experiences such as the Board of Trustees meetings
- Provide opportunities for the fellow to debrief after key meetings and events

- Discuss opportunities for the fellow to contribute to the work of your Office
- Discuss quarterly summary reports with your fellow

A Checklist for Administrative Fellows

- Meet with your mentor soon after you are appointed
- Ask for information about your office and your mentor's work style and expectations
- Meet the staff in your mentor's office
- Discuss and clarify the nature, amount and parameters of staff support that will be available to you during the fellowship
- Ask for written information about the office, keys, etc.
- Arrange to see the office you will be assigned and find out how to make arrangements for anything needed in the office
- Ask about financial arrangements such as travel expenses
- Share background information, skills and experience with your mentor
- Work with your mentor to set up regular meeting times and include some informal times such as lunches
- Discuss and agree about confidentiality of the information shared with the Mentor and by the Mentor
- Discuss what your mentor can and cannot do in his/her role as mentor
- Discuss the mentor's position responsibilities and seek an opportunity to understand these responsibilities by finding an opportunity to exchange information at a specific level. For example, you and your mentor might identify a specific meeting you can attend and contribute to in a specific way
- Take advantage of opportunities to discuss your professional goals and your hoped for outcomes of the year as a fellow
- Seek invitations to meetings that may be of interest and discuss which meetings will be useful
- Review the strategic plan and talk about the University and your mentor's office as an organization and a culture
- Seek specific and general suggestions regarding professional development opportunities
- Seek information about the University and higher education. If this includes suggested readings or conferences to attend, follow up on these recommendations
- If your mentor makes connections with administrators at other Universities, follow up on these connections
- Review with your mentor the list of meetings outlined for each fellow at <http://www.psu.edu/oldmain/vprov/Admin%20Fellows/guidelines.htm> and make sure you are taking full advantage of the opportunities outlined in the program
- Seek advice on handling the workload and job responsibilities
- Take advantage of experiences by preparing for them. Schedule or attend overview meetings, review any relevant written materials or websites, and ask your mentor for background information
- Seek and take advantage of opportunities to debrief after key meetings and events
- Discuss opportunities for you to contribute to the work of your mentor's office
- Prepare and discuss a report each quarter summarizing the experiences of the previous three-month period

Appendix J

Plan for Integrating a Formal Leadership-Learning Component in the Fellowship Year (See Recommendation 3, Page 5)

Introduction:

Many of the recommendations appearing below emanate from survey respondents' reflections on the fellowship program as a significant catalyst for growing Penn State leaders. It is evident that the fellowship is universally viewed as an active learning experience. However, what is not as apparent is the consistency with which fellows obtain leadership experiences. This plan for integrating formal learning elements at three separate intervals in a fellow's year has the potential to significantly enhance the quality of a fellow's leadership experience. Moreover, the committee anticipates that fellows will take advantage of the wide range of leadership development programs and activities that are offered by the Human Resources Development Center and other groups across the University. A list of these activities appear in Appendix J.

Pre-fellowship learning component:

1. Provide the new class of fellows with a notebook of readings on academic culture and organizational development, leadership in higher education, diversity, strategic planning, managing budgets, governance, etc. These readings will be provided to the fellows soon after they are selected and before their fellowship begins. The Executive Director of the Office of Planning and Institutional Assessment in collaboration with the Fellows Advisory Committee will up-date the readings periodically.
2. Prior to the beginning of the fellowship experience, the fellows will attend a half-day formal orientation to the Administrative Fellows Program. The Vice Provost for Academic Affairs will introduce the program. Examples of activities include the following:
 - A panel of three-four former fellows discussing such topics as expectations for the fellowship; becoming involved in the mentor's organization; reviewing mentor/mentee checklists, core experience list; and strategies for thinking about projects with examples from former fellows.
 - A facilitated discussion of the readings focusing on two to three articles. Discussion questions may be distributed in advance.
 - Invite a mentor to comment on the fellowship and describe her/his perspectives on the program.
 - Provide time for a formal question and answer period and informal interaction.

Mid-fellowship learning component:

1. At an appropriate mid-point in the fellowship year schedule a half-day program with a speaker. The purpose of this mid-fellowship learning experience is to facilitate fellows' development of a broader and more comprehensive knowledge base of the University. An example of a topic that a speaker could address is: *What are leadership challenges*

for women and underrepresented groups in higher education? Other possible topics include: the funding of higher education, leadership models, public policy issues, special concerns with medical centers, law schools, etc.

2. A panel of three-four former fellows could be invited to discuss the key leadership challenges in their current work areas.
3. Provide two case studies and facilitated structured discussion groups with former and current fellows.
4. Provide time for informal discussion and up-dates on fellows' experiences and reactions to the fellowship.

Capstone fellowship learning component:

1. Near the ending point of the fellows' experience, schedule a half-day capstone, celebratory meeting to include the current fellows, in-coming and former fellows, as well as current and potential future mentors. Selected deans and/or unit or department heads may be invited. Current fellows will present their projects and other activities, as appropriate.
2. Invite mentors to reflect on their experiences with their fellows during the previous year.
3. A panel of three-four former fellows will present their post-fellowship activities and also discuss career trajectories post-fellowship and how they may remain connected to the fellows program.
4. Provide time for informal discussion and networking.

Appendix K

Leadership Development Activities for Administrative Fellows (See Recommendation 3, Page 5)

The fellow will accompany the mentor to many meetings and events. There will also be meetings that the fellow will attend without the mentor. Additional leadership experiences that fellows may wish to consider include the following:

- New Employee Orientation
- New Faculty Orientation
- Faculty Senate and Senate Committee meetings
- Graduate Council and Senate Council meetings
- Staff Advisory Committee
- Academic Leadership Forum
- Penn State Forum
- Penn State Leader program
- Selected CIC briefings
- Campus College visits
- Roads Scholar Tour

Fellows are encouraged to participate in selected Management Institute modules on strategic leadership, enhancing organizational effectiveness, and managing budgets as well as selected modules of the Leadership Academy, when offered.

Once the fellowship gets underway, it may be difficult to find time to take advantage of the additional leadership experiences. Because these experiences will hopefully provide a context for better understanding University leadership priorities and challenges, they should be scheduled early in the fellowship.

Appendix L

Core Experiences For Administrative Fellow (See Recommendation 4b, Page 6)

Introduction:

To ensure the quality and continuity of experiences for all fellows, there are a set of core activities and meetings that have proven to be beneficial for learning more about the University and how administrators manage throughout the organization. These experiences expand beyond the regular meetings with the Mentor and his/her direct reports.

The purpose of having core experiences is to expose the fellow to as much of the administrative culture of the University as is possible. There should be a balance of academically and non-academically focused opportunities. Realizing the sensitive nature and the knowledge or experience required to participate in some of these administrative activities, it is anticipated that fellows may not always be contributing members. However, when appropriate, the mentor should make every effort to integrate the fellow into the meeting or event.

Core Experiences:

Academic Leadership Council (ALC) meetings - currently invited to one each semester

Administrative Council on Undergraduate Education (ACUE) meetings

Administrative Fellows - informal meetings/gatherings with former fellows

Administrator Meetings including:

President, Provost, Deans, CEO's, Vice Presidents and Vice Provosts, and select
Department/Administrative Unit Heads

Annual Banquets: Commission for Women and Martin Luther King, Jr.

Board of Trustees (BOT) public meetings

Committee on Campus Environment - currently invited one each year

Meeting with women/people of color Trustees - usually over a meal

Budget Task Force (BTF) meetings

Campus Environment Team (CET) meetings

Campus Location visits away from University Park

Central Enrollment Management Group (CEMG) meetings

Commission on Lesbian, Gay, Bisexual & Transgender Equity (LGBTE) meetings

Commission on Racial/Ethnic Diversity (CORED) meetings

Commission for Women (CFW) meetings

Council of Campus Administrators (CCA) meetings - currently invited to one each semester

Encampment

Equal Opportunity Planning Committee (EOPC) meetings

Facilities Resources Committee (FRC) meetings

Key Personnel/Activities in the following areas:

Development, Alumni Relations, Public Relations, Student Affairs, Budget Office, Physical Plant,
Human Resources, Research & Graduate School, Outreach & Cooperative Extension,
Intercollegiate Athletics, Affirmative Action Office, Office of Planning & Institutional
Assessment

Penn State Faculty Staff Forum lunches

President's Council (PC) meetings - currently invited to one each semester

Promotion and Tenure workshops

Special University Task Forces - vary, depending on the needs of the University

State Senate and House Appropriation Hearings in Harrisburg

Appendix M

Examples of Projects Completed by Administrative Fellows (See Recommendation 4c, Page 6)

- Member of Named Endowment Task Force making recommendations to President and Board of Trustees regarding minimum gift levels for endowments. (Development)
- Co-Chair of the implementation team for the Trustee Scholarship Program. (Development)
- Project manager for developing relationships between the medical campus and the School of Nursing, and the healthcare community in State College including the Mount Nittany Medical Center, the Penn State Cancer Institute, and Centre Medical and Surgical Associates. (College of Medicine)
- Compiled a manual for training new staff in the Office of Judicial Affairs. (Student Affairs)
- Oversaw a data gathering effort among Sloan Consortium institutions, related to their interest in becoming involved in E-Army University. (Outreach)
- Developed an advisory and consultative report for Faculty Senate on expanding models for the recognition of outreach activities. (Outreach)
- Implemented recommendations to improve the status of postdoctoral scholars and fellows. (Research)
- Collaborated on research ethics workshops for graduate students and faculty. (Research)
- Served on a committee to draft the Commonwealth College Diversity Report; evaluate Shaver's Creek and related environmental initiatives; assess the Faculty Senate Web site. (Provost)
- Researched and developed best practices for mentoring faculty. (Provost)
- Prepared a financial analysis of the Research Park (now known as Innovation Park) and developed a pro forma model for financial projections. (Finance and Business)

Appendix N

Examples of Post-Fellowship Service to Penn State (See Recommendation #5, Page 6)

Chair:

Administrative Council on Undergraduate Education
International Council
Administrative Review Committee (AD14)
University Staff Advisory Committee
Faculty Senate committees

Chair/Member:

Equal Opportunity Planning Committee
Commissions for Women, CORED, LGBTE (elected, appointed)
Various Search Committees
PSU Dr. Martin Luther King, Jr., Commemorative Planning Committee
University Promotion and Tenure Committee (elected)

Member:

University Calendar Conversion Committee
University First-Year Experience Committee
Administrative Fellows Selection Committee
CFW Mentoring Program and Staff Assistant Training Program (mentors)
Framework for Fostering Diversity, Review Teams
Mastering Supervision and Penn State Leader Planning Committee
Human Resource Development Center Advisory Board
Penn State United Way Campaign Committee
President's Planning & Budget Advisory Sub-committee on Diversity
Sub-committee Chairs, President's Faculty/Staff Awards
Diversity Support & Educational Center Advisory Board
Campus Environment Team
Affirmative Action Review and Advisory Task Force
Planning Committee, Academic Leadership Forums

Appendix O

List of Documents Reviewed for Preparation of this Report

California State University. *Administrative Fellows Program Application 1985-1986.*

Administrative Fellows Task Force. *Draft report to Commission for Women Members.* December 20, 1985.

Petersen, A. C. *Proposal to Extend the Administrative Fellows Program.* January 12, 1987.

Petersen, A. C. *Memo to Commission for Women Executive Committee.* February 2, 1987.

American Council on Education Fellows Program. *Guidelines for Fellows and Mentors: The Fellowship Experience.* July 1986.

Administrative Fellows Program is Established. Intercom. July, 10, 1986.

New Administrative Fellowship Established. Intercom, October 29, 1987.

Shuman, S.B. The Experiences of Administrative Fellows: Summary of Interviews. Commission for Women. September 1996.

Shuman S.B. Evaluation of the Administrative Fellows Program. Office of the Vice Provost for Educational Equity April 2000.