

The Association of Departments of Family Medicine (ADFM) supports academic departments of family medicine to lead and achieve their full potential in care, education, scholarship, and advocacy to promote health and health equity.

- **Excellence:** We pursue the highest goals and accept responsibilities required to achieve our best performance.
- **Integrity:** We commit to honesty, truthfulness and authenticity in our relationships and activities.
- **Inclusion and Equity:** We promote diversity, a culture of belonging, respect and value for all persons, and equity.
- **Respect:** We nurture free and open discourse, listen to ideas, and value diverse perspectives.
- **Partnership:** We commit to engaging with patients and communities as partners in our mission, and to achieving collective impact with mission-aligned organizations.

EXECUTIVE DIRECTOR REPORT ON ACCOMPLISHMENTS: 2023

Progress on Goals for 2023

The main priorities I laid out at the end of 2022 for the 2023 program year, as well as a summary of the outcomes, are shared below!

- 1) Successful FMLC: ADFM co-hosted the Family Medicine Leadership Consortium meetings with NAPCRG in 2023. With an extra focus on research given the research strategic planning process and summit (see below), and with the sudden departure of NAPCRG's executive director in December 2022, more fell to ADFM than originally anticipated, however the meetings both went quite well and feedback from all was positive. Those interested in seeing the agendas for those meetings can find [the agenda for February here](#) and [the agenda for August here](#).
- 2) Successful Research Summit process: We received word from the ABFM Foundation in late October 2022 that they would fund our proposal to host a Research Summit and we have been hard at work in an evolving process of creating a strategic plan for research across the discipline since then! This has included major engagement of the FMLC organizations at both the February and August FMLC meetings; gathering data through surveys, interviews, and focus groups with various constituencies in collaboration with Clarus Consulting Group; recruiting and tracking authors and topics for a special journal issue; and planning for the Summit itself. More information on the process [can be found here](#) and we look forward to the event on October 30th as well as the follow up!
- 3) Professional development: I am interested in finding ways to encourage the ADFM staff to use their professional development funds toward something that would interest them and help them grow their skills or knowledge. In August 2023, I enrolled in a DrPH program and Samantha Elwood is starting a certificate program. Jessie Vera left our staff in June for another opportunity that is a great fit for her interests and skills and although we miss her, we are thrilled to welcome JoBeth Hamon to our team. JoBeth comes to us from the Mental Health Association of Oklahoma and is already jumping in on our conference planning, communications work, and supporting the LEADS and BRC teams.

- 4) Continue expanding LEADS: Our original growth goals for LEADS were high (topping out at 40 fellows in 4-5 years), and I'd still love to see us get there, but we have been stuck around 15 LEADS fellows for the last few years. We tried several new marketing strategies in 2023 and got a slightly larger pool of applicants (up to 18) but after a few withdrawals will have a cohort of 16 this coming year. More on the progress of LEADS is shared in **Appendix A** to this report.
- 5) Trying out the structured BRC Consultation Process: We spent a lot of time in 2022 and early 2023 working out the BRC consultation process to be clearer and more consistent. We have two active, in depth consultations (35+ hours) and the clearer steps seem to be helping, though we will need a few more years of trial and error to make sure.
- 6) Policy book and dissemination of policies: Our staff, Board, and committees spent 2021 to early 2023 reviewing our current policies and adding several new ones that were missing. We have finalized a cohesive "[ADFM Policy Book](#)"; this will be shared as part of every ADFM Board agenda and is also linked to the internal STFM/ADFM/NAPCRG process website, Confluence. We will begin reviewing policies on a regular periodic basis to make minor changes as needed.
- 7) Exploring other forms of revenue: The Executive Committee has begun discussing whether there are other sources of revenue for the organization that we might consider. One possibility that needs additional discussion is a consultation and/or external review "service." We have also done some additional outreach for 2024 Annual Conference sponsorships, reaching out to our list of executive coaches, the recruiting firms with current open chair positions we have posted to our website, and others recommended by Board members.
- 8) Process for periodically reviewing our programs: As part of the ADFM strategic planning process this year, the ADFM staff put together a list of all of the different programs and projects that take place over the course of a year. This can be found in **Appendix B** to this report.

Other Accomplishments in 2023

Membership

We ended 2023 very strong in terms of membership! Our final count was 166 Chair members (had 159 in 2022), 101 Administrator members (had 95 in 2022), 77 Associate members (had 52 in 2022), 7 Associate Administrator members (had 5 in 2022), and 16 Associate Lifetime members (had 12 in 2022). In 2023 we added 3 brand new departments: Texas A&M, Central Michigan University College of Medicine, and Baylor Scott & White. We also were able to re-connect with 5 new chairs in departments who lapsed in recent years. In 2023 we only lost 2 departments and have managed to get down to only 3 departments who have lapsed in the last few years and we haven't been able to get a response from them.

Strategic Committee Projects

In addition to the updates on priorities I had identified for 2022, I wanted to also highlight one of the major, recent activities completed by each of our strategic committees. More of the committees accomplishments from this year are included in **Appendix C** of this report.

- **Diversity, Equity and Inclusion:** continue to hold quarterly meetings for the DEI Vice Chair/Director and Chairs to discuss shared challenges and opportunities; submitted a manuscript on DEI measures for publication (Sept 2023)
- **Leader Development:** hosted sessions at STFM Medical Student Education and Annual Conferences and workshops at the ADFM conference; continue to build to [new chair resource toolbox](#)
- **Healthcare Delivery Transformation:** hosted panel discussion 2023 Annual Conference on “the changing role of the chair and department administrator in academic health centers;” re-initiated “hot topic” discussions being held quarterly – upcoming events:
 - November 16, 2023: ADFM Hot Topic Discussion: CBME Board Certification with Warren Newton – Zoom, [Register now](#)
 - November 27, 2023 ADFM Hot Topic Discussion: Primary Care Service Lines, [Register now](#)
 - December 5, 2023: ADFM DEI Directors and Chairs Meeting – Zoom, [Register now](#)
 - December 7, 2023: ADFM Hot Topic Discussion: Models on Primary Care Spend: Ideas and Opportunities – Zoom, [Register now](#)
- **Education Transformation:** co-hosted hot topic discussion on FQHCs (partnerships for the creation of THC residency programs); submitted two proposals related to developing faculty development programs within your department to RLS and STFM!
- **Research Development:** Creation of a research-wide research strategic plan (see Research Summit above); ongoing quarterly research directors and chairs meetings that create opportunities for networking and focused discussion.
- **Advocacy Committee:** added a field to member profile for “voting zip code” to be used for advocacy outreach purposes; committee member (and AAFP President) Tochi Iroku-Malize, MD, MPH, MBA won the 2023 STFM Advocate Award!

Priorities for 2024

Recognizing that there are several things still to come this year (the Research Summit for example) and a number of areas that are moving rapidly (residency redesign), below are what I see as a few priorities for us in 2024:

- 1) Begin implementation of the “overarching” goals in our new strategic plan (see all goals summarized in **Appendix D**)
 - 2) Follow up from the Oct 30 2023 Research Summit and, by late Spring, generate SMARTIE goals tied to the areas that ADFM has indicated willingness to lead on.
 - 3) Continue efforts to expand the LEADS program, aiming for at least 30 applications for the 2024-2025 cohort. Explore strategies to right-size the budget if we are not able to expand as desired.
 - 4) Expand 2024 ADFM Annual Conference sponsorships/contributions as a way to support additional programming.
-

In summary, 2023 was another year full of great work by our staff, our 6 operational committees (Executive, Nominations, Finance, Membership, Administrators’ Steering, Conference Planning), our 6 strategic committees (listed above), our BRC effort (Steering Committee + 4 sub-committees: curriculum, consultation, fellowship, assessment & evaluation). Thank you all for your ongoing efforts and support of this organization!!



LEADS Progress Report

August 2023 (Year 2, Report 2)

This report is the second report to the ADFM-Foundation in 2023 to report on the progress of the expansion of the Leadership Education or Academic Development and Success (LEADS) Fellowship of the Association of Departments of Family Medicine.

This report includes a summary version of our “Background” shared previously and then provides updates from the previous 6 months as follow-up to our report in January 2023.

Background

Since 2009, ADFM has been training future Chairs of Depts of Family Medicine through a Fellowship mechanism which has accommodated generally between 4-8 fellows annually. In the 2018 ADFM identified leadership and diversity, inclusion, and equity as two overarching priorities, specifically goals to:

- *Increase the number of women, racial and ethnic minorities, and individuals from other groups underrepresented in medicine (including rural) serving as FM department chairs and department leaders.*
- *Increase the pool of individuals interested in and prepared to become department chairs and administrators*

In 2018, we launched a re-branded fellowship, Leadership Education for Academic Development and Success (LEADS). The goal of the fellowship is to train pluripotent mid- to late career family medicine leaders to have the skills/understanding of a high level leadership position like a department chair and who would also be competitive for other leadership positions beyond the scope of their current role within health systems. It is designed to be complementary to other programs but to offer something unique without overlap (as best we can tell) with an intent to provide high level leaders for the discipline.

Summary of Support

The ABFM-Foundation agreed to fund \$60,000 in year 1 (beginning Jan 2022), \$30,000 in year 2, and \$10,000 in year 3 for helping with support of the success of the effort. They also approved \$20,000 per year over years 2, 3, and 4 to be distributed as \$5,000 scholarships along with \$10,000 in year 4 for evaluation of the program.

Updates from January 1 2023 to August 16 2023:

Since our January 2023 report, we wrapped up our 2022-23 cohort of fellows and kicked off the 2023-24 cohort in February 2023. The new cohort of fellows have really impressed our faculty and staff. They are proactive, thoughtful in their conversation and offer a lot of great insights for our other fellows to gain.

23-24 Cohort Progress

The LEADS curriculum continues to evolve with our cohort-responsive content (i.e. built in flexibility in topics depending on cohort needs as determined by the strengths and areas for growth in the leadership competency areas). As a reminder, the program is structured with several in-person workshops throughout the year along with weekly hour-long meetings that alternate between journal discussions, project updates, and webinars, plus a time every other month for meeting as small group “learning communities.” This cohort is broken into two of these learning communities, which are led by our two faculty advisors, Val Gilchrist and Steve Zweig.

Overall the feedback from the fellows from our mid-year evaluation has been extremely positive. Fellows reported that they valued the opportunities to connect in-person, the learnings they’d received from colleagues, one fellow stated the best part for them so far has been, “the people! Our class cohort is amazing with lots of geographic and experiential diversity. The faculty facilitators are wonderful and the AFDM staff members have been organized and very responsive!”

We did receive some feedback around how we structure our initial workshop in February to make it easier for the incoming cohort to figure out who is in their cohort vs the previous one and having more protected time for fellows to meet and connect in their specific cohort (typically the February workshop involves the incoming and outgoing cohort). Additionally, it was suggested in our mid-year evaluation that it would be valuable “to have more of an expectation (or optional expectation) that the fellows dig into the topics locally after they are

presented to the larger group. This way they can see how these topics are managed locally instead of hearing how our speakers manage them.” We are looking into ways of incorporating this into our curriculum as we think it would be a great addition.

Summer workshop. Over the summer, we hosted our first summer workshop at the University of Colorado, the home institution of fellowship director Myra Muramoto. This event took advantage of many of the resources the UC Department of Family Medicine has to offer, including inviting faculty to speak on topics such as community engagement, advocacy and policy and philanthropy. The fellows also completed a DISC assessment on their leadership style, and participated in sessions related to strategic planning and strategic communication planned and carried out by the LEADS faculty. There was also ample opportunity for team bonding with a trip to the mountains for a hike and a BBQ at Myra’s house. Overall the workshop was extremely well received; the fellows reported in the evaluation greatly valuing the various sessions/topics and face to face time with their cohort, our faculty and staff. We have early plans to do something similar next year and are excited to start planning our next workshop in November in conjunction with the AAMC Annual Conference .

Next steps for our 2024-2025 Cohort

We closed our call for applications for the 2024-25 cohort on August 14, 2023. As previously reported, we launched a more robust marketing effort that included sending the call out to our own membership in ADFM; our LEADS alumni; our partner academic organizations (STFM, AFMRD, and NAPCRG); the AAFP Chapter staff and executives through their “Chex Mix” weekly update; numerous personal contacts; the Canadian department chairs group; the “Dallas Group” listserv; and the list of individuals identified as ready for this sort of opportunity by the chairs completing the ADFM annual survey over the last several years. Additionally, we had opportunities to promote the fellowship during the AAFP’s Program Director Workshop, the STFM Annual Conference, and the ADFM Annual Conference. After the initial application deadline, we decided to extend the deadline in the hopes of increasing our pool of candidates from health systems. In the relaunched call for applications we put a renewed emphasis requesting that health system leaders, and administrators apply. We also reached out to new and interim chairs with a specific ask to consider applying as we have heard that this program is useful to this group of people.

After the final close of the application, we had 18 competitive applicants, including one international applicant who withdrew for reasons of cost beyond the tuition. Our Oversight Committee is actively reviewing these 17 applications as of mid-August and we look forward to sending letters of acceptance in September! Additionally, we thank the ABFM-F for their generosity in sponsoring a scholarship opportunity for the fellows. This year we had 5

applicants indicate interest in the scholarship (designated as a \$5,000 tuition reduction) and the Oversight Committee is reviewing these as well.

Checking in with our alumni!

We continue to try to better serve our LEADS alumni and create opportunities for networking with the addition of a few in person receptions across the year. The hope is that these receptions will provide an opportunity for past fellows to reconnect and for potential future applicants to learn more about the program. We hosted a reception at the ADFM Annual Conference in February and had a large turnout of past, current, and prospective fellows and department chairs. We continue to use the Alumni listserv to stay connected with past fellows, communicate upcoming events, and share open chair and other senior leader positions.

This spring we began a systematic follow up process with all of our alumni, including the 42 fellows who participated before we rebranded the program to LEADS (2009-10 cohort to 2018-19 cohort) and the 49 fellows since the rebrand (2019-20 cohort to 2022-23 cohort). To date, we have heard back from 19/42 of the pre-LEADS fellows (45%) and 36/49 of the LEADS fellows (73%). We will continue to follow up with those we haven't heard from yet, but have some helpful information from those we've heard from so far.

- From these surveys and our internal records, 24 of the 42 pre-LEADS fellows (57%) have gone on to become department chairs (interim and permanent), and others have taken on other leadership roles (e.g. Dean, Associate Dean, VP of Education for Health System, chief clinical officer, etc.).
- Most (16/19) who responded indicated willingness and interest in being involved in staying engaged with LEADS through various opportunities, such as presenting on webinars to fellows or serving as an informal consultant to a fellow on their project.
- Of the 36 LEADS fellows from 2019-20 to 2022-23 cohorts who responded, 16 (44%) indicated that their role has changed to include a new or different leadership position since the fellowship, including 6 department chairs, many vice chairs of different varieties, and some associate dean-type roles; 12/16 (75%) agreed or strongly agreed that participation in LEADS played a role in this career decision-making.
- Additionally, 28 of the 36 (78%) agreed or strongly agreed that the investment of time and money into LEADS was worthwhile, including 15 of the 16 (94%) who have had career changes who strongly agreed it was worthwhile.
- Similar to the earlier cohorts, the vast majority of former LEADS fellows expressed interest and willingness to staying engaged with LEADS through various opportunities, such as presenting on webinars to fellows or serving as an informal consultant to a fellow on their project.

Plans and process improvements

In addition to the summer workshop noted above we have been working to roll out the following additional features with the current cohort:

- *Outreach to sponsoring chairs/supervisors.* We continue to think of ways to keep department chairs (or other supervisors), who are often responsible for funding our fellows' participation in this program, engaged in the progress of their fellow throughout the year. In order to better communicate back to the sponsoring chairs/supervisors the value of the fellowship for their participant, we initiated the fellowship year with a letter to each individual fellow's sponsoring chair or equivalent (example included in the appendix). As describe below, during our mid-year check-in process for the fellowship, we requested that each fellow meet with their chair/supervisor in order to provide an update on the progress of their annual project. We see this also as a good opportunity to work with their chair/supervisor on any barriers to their fellowship and glean any insights into their perspective on how they are progressing.
- *Assessment using the ADFM Competencies for Department Chairs and Senior Leaders, and the DISC Assessment for Leadership Style.* We've been interested in performing some sort of assessment beyond the self-assessment of our ADFM Competencies for Department Chairs and Senior Leaders that we have the fellows do at the start of their year, in order to give our fellows a more encompassing view of their competencies.
 - First, included in the letter to the chair was a request for them to complete their own assessment of their fellow. This activity proved useful because it gave the fellows a more thorough overview of their skillset. Additionally, by reviewing the aggregate data, it was clear that the fellows had rated themselves more harshly than their sponsoring chair/supervisor had (overview of data included as an attachment). We made minor adjustments to the curriculum based on the fellows and chairs' responses to these assessments.
 - Secondly, this year we also decided to use the DISC Assessment of Leadership Styles, embedded as a session during our Summer Workshop. This session was well received from the group. Although we'd have liked to do it at the beginning of the year, from the informal feedback we heard, it sounded like the timing was right as the debrief of the assessment required a level of vulnerability that seemed to work better given we're further into the fellowship year and the current cohort now know one another better.
- *Mid-Year Check-In.* In line with the intentions of our letter to sponsoring chairs/supervisors, we built out a more robust mid year check in over the summer months in that involves each fellow checking in with their learning community advisor

1:1 and coming up with a mid-year check in report, meeting with their sponsoring chair/supervisor to provide them with an update on their fellowship (the components of this are included as an attachment to this report), and similar to last year, completing a mid-year evaluation of the fellowship (included as an attachment to this report). The goal of these activities is to not spit out a report card for each fellow, but to provide an opportunity for 1:1 conversation with their learning community faculty and their chair/supervisor and have a written narrative of their progress in the fellowship so far.

- *Firming up our process overall.* In June, we said good-bye to our LEADS staff person, Jessie Vera. In looking to welcome Jessie's replacement, JoBeth Hamon, we decided to firm up some of our process documents (work that Jessie had initiated months before her departure). This work led to two important documents that we believe have already had a positive impact on our current cohort. The first document is our LEADS Fellows Guidance document. This document offers a snapshot of the fellowship year and includes important information related to expectations and instructions for weekly activities, projects and presentations. The second document is the backbone of the program, the LEADS admin support doc. This document details the process for all major projects for the fellowship and includes a detailed timeline for the year.

Current (2023-2024) Cohort

Below is the list of 2023-2024 fellows, their institutions, and their proposed projects/project areas. We will add in the 2024-25 fellows in our January report.

Full Name	Institution	Project Areas
Annamalai Ramanathan, MBA	Medical College of Georgia at Augusta University	Integrated Mental and Behavioral Health in Family Medicine
Jaime Bowman, MD, FAAFP	Washington State University Elson S. Floyd College of Medicine	Centering Rural Experience in Curriculum Development
Ann Rutter, MD, MS	Albany Medical College	Creating a culture of inclusivity: Recognizing and changing implicit bias language in narrative assessments of learners, faculty, and applicants
Shalina Nair, MD, MBA	The Ohio State University	Mentoring Program for Faculty Development

Esther Danphuong Ho, MD	UT Southwestern	Developing and Implementing Faculty Mentorship for the UTSW Department of Family & Community Medicine
Andrew Slattengren, DO	University of Minnesota Medical School Department of Family Medicine and Community Health	Developing a Family Medicine Rural Training Track Residency in Minnesota
Barbara Keber, MD	Donald and Barbara Zucker School of Medicine at Hofstra Northwell	Incorporating telehealth into residency curriculum in an underserved population m
Taylor Hooks, Executive MBA, BS	University of Southern California, Keck School of Medicine of USC	Advancement of health equity through development of a scalable street medicine program model.
Careyana Brenham, MD	SIU Family & Community Medicine Springfield Program	Development of a Holistic Faculty Evaluation / Review Process and Faculty Development
Santina Wheat, MD, MPH	Northwestern Feinberg Department of Community and Family Medicine	Assessment of DEI Climate in a Family Medicine Department
Allison Macerollo, MD	Ohio State University College of Medicine Department of Family and Community Medicine	Development of an Effective Feed Forward Process from UME to GME
Jeff Weinfeld, MD, MBI	Georgetown University	Promoting Specialty Respect at Georgetown University Medical Center/MedStar Health – Next Steps for Organizational Change
Monica Le, MD,	Harbor-UCLA Medical Center	Diabetes Health Equity Through the Lens of Adverse Childhood Events Screening
Josephine Fowler, MD, MSc, MBA	University of Massachusetts/ UMass Memorial Health System	Unite: Working Together to Improve Diversity, Equity, and Inclusion
Gretchen Shelesky, MD, MS, FAAFP	University of Pittsburgh School of Medicine, UPMC St Margaret Family Medicine Residency Program	Faculty Development expanded across the state of PA

We thank the ABFM-Foundation for the funding to get this program underway and look forward to sharing the next update in January 2024!

Attachments:

- Mid-Year Check-In Components
- Mid-Year Check-In Template
- LEADS Guidelines
- LEADS Admin Support and Timeline
- Evaluation plan logic model
- Alumni Survey
- Letter to sponsoring chair

ADFM LEADS MID-YEAR CHECK-IN

Purpose: Mid year check in on individual fellows' progress within the fellowship.

Components:

1. Fellow/chair check-in - Completed by fellow and chair
2. Mid-Year Eval of the Program - Completed by fellows
3. Mid-Year Update on Fellows' Progress - Completed by LEADS faculty and staff

Details:

1. **Fellow/chair check-in:** Request that each fellow check-in with their chair on their progress within the fellowship and their project.
2. **Mid-Year Eval of the Program** - example: <https://forms.gle/CpH1N58RP18B5tbg9>
3. **Mid-Year Update on Fellow's progress:**

Each progress update will include the following components:

Attendance:	High	Missed a few session	Often unable to participate
Participation:	High	Sometimes	Infrequent

Narrative assessment of fellow progress on project

Narrative progress on stated goals

ADFM LEADS Mid-Year Check-In

Purpose: Mid-year check in on individual fellows' progress within the fellowship.

Fellow Name: _____ / **Learning Committee Advisor:** _____

Rating scale:

Attendance between February 2023 – end of June 2023		Participation between February 2023 – end of June 2023	
High	Missed <25% weekly meetings	High	Participates during most meetings with more than 1 one of the following methods: speaks up verbally, responds in the chat, or emails.
Medium	Missed >25% weekly meetings	Medium	Participates periodically and/or seems to be preoccupied with other materials ie doing email/ text/reading or interruptions
Low	Missed >50% weekly meetings	Low	Rarely participates during meetings.

Rating:

Attendance:	
Participation:	

Update on Fellow's progress on project:

Update on Fellow's progress on stated leadership related goals:



LEADS Fellowship Guidelines & Guidance

Fellowship Cohort 2023-2024

The LEADS Fellowship seeks to expose fellows to a “tasting menu” of a broad range of leadership topics and issues facing senior leaders in academic family medicine. Our philosophy is that gaining leadership and managerial competence is as much a journey as a destination, much like the practice of medicine. Regardless of one’s career trajectory, we hope your time as a LEADS fellow will stimulate an interest and desire for life-long learning and professional development in the art and science of leadership.

The most learning and personal growth happens when we venture beyond our normal comfort zone. LEADS places a high priority on maintaining a safe learning environment where sharing and being vulnerable can take place in an atmosphere of confidentiality and compassion. The following guidelines and guidance are to intentionally create and sustain our supportive learning environment.

OVERVIEW:

- 1) LEADS Rules
- 2) Guidelines for Weekly Meetings
 - a) Guidelines for LEADS Weekly Sessions, Class Activities and Assignments
 - b) General Ground Rules for Zoom
 - c) Learning Community Mentor's Role
 - d) Weekly Meeting Format & Expectations
 - i) Monthly Format
 - ii) Learning Community Meetings
 - iii) Independent Work Time
 - iv) Journal Club/Reading Discussion Group
 - v) Project Updates
 - vi) Webinars
- 3) Projects
 - a) Annual Project
 - b) Leadership Interviews
 - c) Ignite Talk Presentations

1. “LEADS RULES”

- We commit to confidentiality – what is shared in our sessions stays in the sessions.
- We each listen with curiosity and compassion.
- We avoid making assumptions about other people, including their history, race, and experience. We use preferred pronouns.



- We are committed to progress over perfection. And we acknowledge the prioritization of impact over intent as well-intentioned actions and words can cause trauma and pain.
- We each speak from our own experience; use "I" language; we don't speak for others and we don't share someone else's stories or experiences.
- We center lived experience in this work and we recognize it as valuable insight and wisdom.
- We notice and stay aware of our reactions and when we're triggered, we individually notice where we're experiencing this activation of energy within and name it.
- We expect conflict and value it as an opportunity to deepen understanding, prioritize relationships, and build common ground.
- We each work to decenter ourselves and make space for others. Especially if we identify as someone who holds the dominant privilege, and who works to understand the intersectional experiences and realities of minority, marginalized, or disenfranchised people.
- We acknowledge the role of our LEADS community, including the faculty and staff, in our leadership journey and commit to a growth mindset and a positive intent in our interactions.

2. GUIDANCE FOR LEADS WEEKLY MEETINGS

A. GUIDELINES FOR LEADS WEEKLY CLASS ACTIVITIES & ASSIGNMENTS:

This is time to dedicate to yourself as a LEADS fellow.

1. Protect this time for your professional and personal development. ***If you are unable to attend a session, please email both Jessie Vera and Sam Elwood.***
2. Allow yourself the space and time, free from other distractions to be present – both for yourself and for your classmates.
3. Jump in with both feet and participate! What you put in will determine what you get out of the fellowship experience and take with you into the future.
4. Reminder your participation also affects your class cohort, the success of your cohort relies on each of your contributions, thoughts, willingness to share, and grow.

B. GROUND RULES FOR ZOOM:

1. Please make every effort to be on time – the hour goes by quickly!
2. Mute yourself when not speaking.
3. Your camera should be turned on whenever possible and without a distracting background.
4. Use the “hand raise” feature when you want to speak or type your comments in the chat, particularly if in a larger zoom group
5. Be mindful of the amount of time you are speaking, as we want to give everyone an opportunity to share.



C. LEARNING COMMUNITY FACULTY ADVISOR ROLE:

Learning Community Faculty Advisors play an important role in fostering the LEADS fellow's growth throughout the year and are expected to:

- Set aside a weekly hour to devote to LEADS (***Wednesdays 1-2 pm Eastern/12-1 pm Central.***) These meeting times can be broken down around the following formats:
 - **Learning Community Time:** Every other month, faculty advisors will lead a discussion with their cohort focused on current LEADS topics
 - **Journal Discussion:** With the entire LEADS cohort, faculty advisors are expected to read the articles and offer their perspectives/insights as needed to help foster a good discussion
 - **Project Updates:** With the entire LEADS cohort, faculty advisors are expected to listen in on each of the fellow's project updates and offer any guidance or feedback as needed
 - **Webinars:** Depending on the topic, faculty advisors may be asked to participate in the panel discussion by responding to the facilitator's questions.
- Faculty advisors will provide coaching to their fellows on their fellowship objectives and LEADS projects throughout the year (focusing on the process, what they learned and gained as leadership development) and helping them prepare for their "Ignite" talks about their projects during the ADFM conference at the end of the year.
- Faculty Advisors commit to the necessary prep time for any of these activities, regular meetings with the LEADS program director and staff (typically monthly), and to attending the **three** in-person sessions in their entirety.

D. WEEKLY/MONTHLY MEETINGS FORMAT:

I. Monthly Format

- **Week 1:** Learning Community Meetings *or* Independent Work Time (Every other month switch-off)
- **Week 2:** Journal Club – Fellows lead discussion
- **Week 3:** Project Updates
- **Week 4:** Webinar
- **Week 5:** if there is a week 5, session and topic is TBA

II. Directives for **Learning Community Meetings**



- Learning community meetings happen every other month
- The purpose is protected time with fellows' learning community and assigned faculty advisor
- Topics and activities will center around the overall theme of the month.

III. Directives for **Independent Work Time**:

- In the months that fellows do not meet with their learning community, they're encouraged to still block the hour on Wednesday for LEADS related work - whether that be to review the materials or work on their project.

IV. Directives for **Journal Club/Reading Discussion Group**

Purpose:

- 1) Expose fellows to published works on topics relevant to leadership development
- 2) Stimulate reflection and discussion on topics addressed by the published works
- 3) Provide additional resources on leadership topics for fellows' learning enrichment and reference

Description:

The LEADS journal club is a hybrid of a traditional journal club and a book club. It draws on a diverse set of published works from a wide range of domains. Papers selected for presentation and discussion may include: original research, narrative or systematic reviews, commentaries or opinion pieces. Even when the paper is on original research, the goal of presentation /discussion is less about a detailed analysis and critique of the design and methods, but more about stimulating discussion and reflection about the point(s) the author(s) is trying to make.

As a fellow presenter for the journal club, your role is to be a facilitator of conversation. Each fellow should be reading the articles, so a detailed summary is not necessary. See below for a general structure to facilitation.

Presenter Preparation:

1. Give an "elevator speech" summary of the article(s) in 2-3 minutes (since we do expect everyone to have already read the article)
2. Tell the group what you thought about the article: e.g.
 - a. Any take-home points?
 - b. What was useful or relevant for you?
 - c. What resonated with you and/or what did you disagree with? (entirely personal and subjective, this does not need to apply to everyone.)

3. Have 2-4 discussion questions ready to pose to the group to get the discussion started and facilitate the discussion.
4. The remainder of the time should be a full group discussion. If there is a lull in the conversation, some of the following reflections may be helpful
 - a. What did you learn (if anything)?
 - b. What surprised you (if anything)?
 - c. What confirmed/contrasted with what you already knew or thought?
 - d. What stimulated your thinking?

Audience Preparation:

1. Read the paper being presented.
2. Ideally, also read the optional related papers.
3. Prepare to contribute to discussion by reflecting on:
 - a. What did you learn (if anything)?
 - b. What surprised you (if anything)?
 - c. What confirmed/contrasted what you already knew or thought?
 - d. What stimulated your thinking?
4. Be sure to make room for others to share their thoughts.

V. Directives for Project Updates

Objectives: Through presenting periodic project updates at LEADS meetings, fellows will:

1. Have the opportunity for collaborative learning through hearing about other LEADS fellows' project goals, progress, and lessons learned
2. Provide peer-to-peer idea generation, problem-solving, and peer support for LEADS projects
3. Practice a variety of communication skills/techniques for short, focused presentations to small groups of peers/teams

Guidance:

These should be short informal presentations. Sometimes a fellow prepares a few slides or a handout, sometimes they just talk. The same fellow has used both formats at different times. Maximum of 7-10 minutes.

- 1) Start update with what the project is about
- 2) What leadership competencies/skills you are hoping to gain through doing this project
- 3) Describe project progress thus far
- 4) Any major barriers, surprises, or lessons learned that you have encountered
- 5) Leave time for Q&A, suggestions from other fellows

VI. Webinars

Purpose:

Through monthly or sometimes bi-monthly webinars, fellows will get the opportunity to hear from a wide range of guests and content experts beyond on thematic topics and tap into the larger ADFM network

Guidelines:

- Topics for the webinar are located on the annual agenda and information on the panelists will be shared a few weeks in advance of the webinar.
- Fellows are strongly encouraged to submit questions ahead of time.
- During the discussion fellows are encouraged to also ask questions of the panelists and help keep the conversation flowing.

3. Projects

a) LEADS Fellowship Project

Description:

Your annual project begins in your application cycle when you deliberate on a project you would like to conduct throughout the year-long duration of your LEADS Fellowship. Your project should have at least one objective to address an area for professional growth from the [Leadership Competencies for Family Medicine Department Chairs and Senior Leaders](#).

Throughout the year, you will work on your project and present project updates to your cohort, see *Section 2. D.IV* for more details.

Many fellows experience a change in their project while in the fellowship. This can be due to a myriad of factors. Changes are welcome, provided they are thoughtfully considered and you have consulted peers, your learning community faculty advisor, and/or your department chair. If you would like to make a change in your annual project, please follow the steps below.

1. Contact your Department Chair and explain the reason behind changing your annual project. We recommend checking in that your Department Chair feels this switch will be a 'value-add' to both your own professional development and the department.
2. Once a decision has been made with your Department Chair, contact your learning community faculty advisor, Dr. Myra Muramoto, and staff: Jessie Vera and Sam Elwood to inform us of the change.
3. In your next project update, share your changes and the reasons behind them!

b) Leadership Interviews

Description:

Senior Leadership interviews are intended to fill in the personal perspectives of organizational dynamics and expand opportunities for your professional development within the organization, and oftentimes beyond.

The class will be divided into groups, interviewing one of the following individuals: the Research Dean, the Education Dean, or the Chief Medical Officer. Be aware that the specific titles for these positions will vary among institutions.

Goals:

- Gain insights into your organization's Structures and Functions
- Meet and be met by senior leaders
- Open your mind to new opportunities in leadership

c) Ignite Talk Presentations

Format:

The Ignite talks follow a very specific set of guidelines you must follow:

- 5 Minutes Long
- 20 Slides
- Each slide set to auto-advance in 15 seconds.

Submission & Presentation:

- Pre-recorded version due two weeks before ADFM Annual Conference
- Presentation will be given
 - At the ADFM Annual Conference to the incoming LEADS Cohort at the LEADS Workshop
 - At the ADFM Annual Conference to the ADFM membership

Online Resources:

These resources show examples, give instructions on how to set up your PowerPoint, and more.

Ignite Talks

<http://www.ignitetalks.io/>

Create an awesome Ignite in 6 steps

<https://www.lauramfoley.com/ignite/>



How to give a great Ignite talk

<http://scottberkun.com/2009/how-to-give-a-great-ignite-talk/>

How to make slides Ignite-friendly

<https://igniteSeattle.com/2014/05/18/how-to-make-slides-ignite-friendly/>

What is an Ignite presentation and why should you try it?

<http://sixminutes.dlugan.com/ignite-presentations/>

The Fastest Way to Create an Ignite Presentation

<http://www.speakingaboutpresenting.com/content/fast-ignite-presentation/>

Professional Development with ignite Talks

<https://orise.orau.gov/resources/stem/professional-development/during-the-internship/ignite-talks.html>

LEADS ADMIN SUPPORT DOC

<p><u>ADFM LEADS Program Website</u></p> <p>Important Resources:</p> <ul style="list-style-type: none">• Google drive folder• LEADS Guidance Doc• Annual Agenda• Attendance tracking sheet• Fellow/Senior leaders Database (alumni list)• Logo	<p>Important Roles:</p> <ul style="list-style-type: none">• LEADS Admin (Sam - lead; JoBeth)• LEADS Faculty Advisors (Valerie.Gilchrist@fammed.wisc.edu & zweigs@health.missouri.edu)• LEADS Program Director (MYRA.MURAMOTO@cuanschultz.edu)• LEADS Oversight Committee<ul style="list-style-type: none">○ Myra M. (Program Dir.)○ Amanda W. (ADFM Exec. Dir.)○ Sam E. (ADFM staff)○ Warren N. (ABFM)○ Val (adviser)○ Steve (adviser)○ Jeff Q. (board)○ Grant G. (leader development comm)○ Alison D. (leader development comm)• LEADS Incoming Fellows Cohort (or current)• LEADS Outgoing Fellows Cohort
---	---

Listsers:

- ADFM-LEADS alumni@connectedcommunity.org (alumni)
- ADFM-202324adfmleadfellows@connectedcommunity.org (current cohort)
- ADFM-LEADS22-23@connectedcommunity.org (past cohort)

TABLE OF CONTENTS:

<p>WEEKLY TASKS:</p> <ul style="list-style-type: none">• Coordinate weekly meetings & communications• Maintain Timeline <p><u>MONTHLY TASKS:</u></p> <ul style="list-style-type: none">• Plan Learning Community Meetings - <i>bi-monthly</i>• Select journal articles• Coordinate webinar• Coordinate project updates• Plan ahead for next month• Meet with LEADS Faculty <p>QUARTERLY TASKS:</p> <ul style="list-style-type: none">• Share open chairs list <p>BI-ANNUAL PROJECTS:</p> <ul style="list-style-type: none">• Bi-Annual Report to ABFM• Bi-Annual Eval from Fellows	<p>ANNUAL PROJECTS:</p> <ul style="list-style-type: none">• Leadership interviews• Yearly Projects <p>ANNUAL PROCESSES:</p> <ul style="list-style-type: none">• Fellows Recruitment• Fellows Application Review• Fellows Onboarding<ul style="list-style-type: none">○ Assessments• Fellows Offboarding• Faculty Advisor Recruitment• Fellowship Director Annual Review• Mid-Year Check-In <p>ANNUAL EVENTS:</p> <ul style="list-style-type: none">• Feb. workshop• July workshop• Nov. workshop• Ignite Talks• Alumni Receptions
---	---

WEEKLY/MONTHLY/QUARTERLY TASKS:

LEADS WEEKLY TASKS:

- Review the [timeline/task list](#) and update the status of individual items.
- Send reminder emails beginning of the week about upcoming weekly meeting topic/format.
- Attend weekly meetings - review [monthly tasks](#) for more details.
- Track [attendance](#).
- Launch polls in zoom for journal discussions and webinars.
- As needed, send a follow up email with any action items from the weekly meeting.

LEADS MONTHLY TASKS:

Current month prep: (for example if it's March, you should be doing this in March)

- 1st week – Email reminder independent work time or learning community meeting on Wednesdays / *Ask Myra for next month's article 5 weeks in advance*
- 2nd week – You or Myra send article; reminder who is assigned to facilitate / *Meeting with Myra*
- 3rd week –Remind presenters they are presenting / *notify next month's presenters*
- 4th week – Touch base with webinar panelists; ask fellows to solicit questions to send to panelists / *begin scheduling webinar 2-3 months out*
- 5th week – email reminder no meeting (if applicable) or additional journal article / *review next few months' schedules*

Next month prep (listed above in gray): (for example if it's March, this is for April)

- Ask Myra for next month's article 5 weeks in advance
- Meeting with LEADS faculty – opportunity for content planning; other housekeeping items; run through any issues
- Try to schedule a time to check-in with panelists for upcoming webinar (as needed)
- Notify presenters for next month

Next next month prep: (for example if it's March, this is for May):

- Reach out to listserv/advisers for interest in the next *next* month's webinar
- Review for any upcoming holidays or 5th weeks and plan accordingly

Open Chairs List:

- Update list as you learn about open positions and filled positions.
- Along with circulating on the Chairs Listserve, send to the LEADS Alumni Listserve.

BI-ANNUAL PROJECTS:

Bi-Annual LEADS Progress Report to ABFM

- Timeline: January & July
- Find the most recent report and update with current happenings and upcoming plans.
- Work with Amanda to submit to ABFM
- [Example report](#)

Bi-Annual Program Evaluations for Current Cohort

- Timeline: August & February
- Update and send Mid-Year Eval in surveymonkey
- Review results with LEADS faculty and make adjustments
- Update and send Annual Eval Questions in surveymonkey
- Review results with LEADS faculty and make adjustments
- [Example doc](#)

Alumni Events

- Coordinate in-person reception in conjunction with NAPCRG or STFM.
- Coordinate in-person reception in conjunction with ADFM.
- Share events on alumni listserv.

ANNUAL PROJECTS:

Leadership Interviews

- Timeline: May - Oct.
- [Review and update instructions](#) with LEADS Faculty Advisors.
- Assign fellows to mission areas.
- Share instructions over email and during weekly meeting.
- Outcomes of interviews will be shared in October Learning Community meetings.
- Fellows will also post to the discussion board in connect a summary of outcomes.

Yearly Projects

- Timeline: Feb. - Feb.
- Each fellow works on a project throughout their year. Fellows will give 15-20 min updates on their project during weekly meetings. More details [LEADS Guidance Doc.](#)

- Update instructions for fellows as needed.
- Ignite talks:
 - In winter, update and share [instructions on Ignite Talks](#).
 - Request that fellows pre-record their ignite talks and track completion. Add pre-recorded version to website.
 - Coordinate ignite talks during ADFM Annual Conference.

ANNUAL PROCESSES:

Incoming Fellows Recruiting Process

- Timeline: March - July
- [Update applications checklist](#).
- Put application package together by updating the following
 - [Applications](#) (1. Candidate app 2) Supervisor app 3) Nominator app)
 - Application rubric ([scoring materials folder](#))
 - [Language around announcement](#)
 - [ADFM LEADS Website](#) (turn on banner)
 - Review fellowship timeline on site & assess plan for in-person events
- Launch Call for Applications
- Coordinate marketing plan
 - Send announcement to ADFM Listservs and partners (Partners list)
 - Partner booth at STFM Annual Conf.
 - Plan virtual event with alumni to answer questions and share out recording
 - Mention in Quarterly Newsletter
 - Market to strategic committees
 - Send reminders every few weeks to partners

Incoming Fellows Application Review Process

- Timeline: July & August
- Prepare the application materials for review:
 - Finalize application rubric ([scoring materials folder](#))
 - Download applications and save to individual fellows folders
 - Divide up the applications by reviewer (3 reviewers per application; Program Director reviews all)
- If needed, meet with reviewers (LEADS Oversight Committee) and review the plan for review.
- Provide a month for reviewers to review their applications.
- Once all applications are reviewed, notify candidates of the decisions.

Incoming Fellows Onboarding Process

- Timeline: September - February
- Work with LEADS Faculty to start updating the following resources/processes:
 - Annual agenda & timeline
 - LEADS guidance doc
 - Pre-work needed from fellows
 - Any new processes, projects or work the team wants to introduce
- Update fellows' contract.
- Notify fellows of acceptance into the program. Requests that fellows:
 - Sign contract within a month of being notified
 - Complete payment by early January of the next year
- Request that fellows complete pre-year work/materials & track completion:
 - Fellows will provide: professional bios and headshots for the website, and a longer bio to share with the cohort and faculty advisors.
 - Fellows will complete a self-assessment of the ADFM Senior Leaders Competencies and a 360 assessment. [Review assessment process for details.](#)
 - Fellows' chairs or supervisor will complete an assessment of the ADFM Senior Leaders Competencies
 - Use the fellows/chairs' responses to inform the LEADS Annual Agenda.
- Share information on upcoming in-person events (Feb. workshop & ADFM Annual Conf.).
- Schedule optional virtual meet & greet for incoming cohort and LEADS faculty
- Add fellows to Connect.
- Create LEADS Cohort Community in Connect.
- Send holds for Annual conference & Weds weekly meetings.
- Once fellowship year starts (March),
 - Invite fellows to join strategic committees
 - Assign fellows to learning community faculty advisors
 - Check with fellows and then send out [letter to sponsoring chair.](#)

Outgoing Fellows Offboarding Process

- Timeline: January - March
- Have fellows complete all tasks related to their Ignite Talks Presentations
- Have fellows complete annual evaluation
- Remind fellows they will be on the ADFM listserv and included in ADFM offerings for the next year. Their cohort specific listserv will remain open.
- In a year, invite fellows to join as alumni members or remove them from the listserv.
- Remove from strategic committee invites if they do not elect to join as associate

members.

Learning Community Faculty Recruitment Process

- Timeline: July - September
- Ideally will have 1 faculty advisor for every 6-8 fellows.
- For the past two years (2022 & 2023), the cohorts have had two faculty advisors.
- Assess on a yearly basis if 1) advisors wish to stay for an additional year and 2) if we need to recruit more advisors or cut down the number of advisors we have. This is based on the amount of fellows we approve for the upcoming year.
- If more faculty advisors need to be recruited, update the following:
 - Faculty Advisor role
 - Application
 - Materials for marketing
- Send call for applications to ADFM Listserv.
- Plan to onboard new advisors as needed.

Assessment Process

- Timeline: September - February
- Create a new self-assessment for incoming fellows to complete ahead of their cohort year in survey monkey. [Example here.](#)
- Create a new assessment for chairs to complete ahead of their fellows. [Example here.](#)
- Share results with LEADS faculty and update annual agenda accordingly.
- Share individual responses with incoming fellows before fellowship kickoff.
- Share aggregate data for both assessments with fellows during Feb. workshop. [Example here.](#)

Fellowship Director Annual Review Process

- Timeline: September - January
- Review process is managed by the ADFM Executive Director, LEADS Oversight Committee and ADFM Executive Committee.
- [Review process document for more details.](#)

Mid-Year Check-In Process

- Timeline: July - August
- Work with LEADS Faculty to put together a mid-year update doc for each fellow. Goal is to check-in with fellow students on their progress so far and also have an opportunity to check back in with their sponsor.

- Components include: chair/fellow check-in; advisor/fellow check in; written update of each fellow. Details in [Mid-Year Check-In Doc.](#)

EVENTS:

February Workshop

- Begins Tuesday before the ADFM Annual Conf.
- Two days of content (Tues, 1 - 5 pm - Weds, 7:30 am - 12 pm)
- Attendees include incoming and outgoing fellows cohorts.
- For the incoming cohort, content centered on introductions, team bonding and preparing for the year ahead.
- For the outgoing cohort, content centered on celebrating the past year and preparing for their ignite talks.
- [Example of workshop agenda.](#)

July Workshop

- Currently in July, but can be anytime during the summer. Make sure timing works for LEADS program director, admin and faculty.
- Before planning, assess whether there's enough in the budget to continue with this session.
- Three days of content (Thurs, 7:30 am - 5 pm; Fri, 7:30 am - 5 pm + team bonding activity in the evening; Sat, 7:30 am - 12 pm)
- Past themes include: Advocacy and policy; strategic planning; strategic communication
- [Example of workshop agenda.](#)

November Workshop

- Begins Thursday before AAMC Annual Conf. Fellows are also encouraged to attend AAMC, though it's optional and not part of their tuition.
- Two days of content (Dinner evening before; Fri, 7:30 - 4 pm)
- Themes are flexible. Depends on who is attending AAMC. Good opportunity to include content that has not been incorporated in the agenda. Past sessions included: FM Dean's panel; future of family medicine; change management.
- [Example of workshop agenda.](#)

Alumni Receptions

- Coordinate in-person reception in conjunction with NAPCRG or STFM.
- Coordinate in-person reception in conjunction with ADFM.
- Share events with alumni listserv.

LEADS TIMELINE/TASK LIST:		
Month	Action Item	Status
February	<ul style="list-style-type: none"> Outgoing cohort: Weekly meetings wrap up 	COMPLETE
	<ul style="list-style-type: none"> Plan for February/March 	COMPLETE
	<ul style="list-style-type: none"> Incoming cohort: Self-assessment; bios (long bio/professional bio); photo; add them to the listserv ahead of conference & go over how to use listserv 	COMPLETE
	<ul style="list-style-type: none"> Outgoing cohort: Ignite talks 	COMPLETE
	<ul style="list-style-type: none"> Feb workshop & ADFM Annual Conf. & NEW! Alumni event - Incoming cohort starts at Annual Conference 	COMPLETE
	<ul style="list-style-type: none"> Begin marketing for next cohort by telling chairs when to expect call for applications 	COMPLETE
	<ul style="list-style-type: none"> Remove previous year's fellows from the listserv 	COMPLETE
March	<ul style="list-style-type: none"> NEW! Outgoing cohort wraps up: collect self-assessment and yearly eval 	COMPLETE
	<ul style="list-style-type: none"> NEW! Review beginning of the year and end of the year self assessment and document outgoing cohorts progress 	COMPLETE
	<ul style="list-style-type: none"> NEW! LEADS Chairs: Collect assessment of fellows 	COMPLETE
	<ul style="list-style-type: none"> Weekly meetings begin with incoming cohort 	COMPLETE
	<ul style="list-style-type: none"> Plan weekly meeting content for May 	IN PROGRESS
	<ul style="list-style-type: none"> Send self-eval results to fellows AND chair eval 	COMPLETE
	<ul style="list-style-type: none"> Send both self-eval results to outgoing cohort 	COMPLETE
	<ul style="list-style-type: none"> Create connect community and add ADFM badges to incoming fellows in salesforce (badges include "LEADS" & "ADFM Guest Badge" as well as "Chair/Admin" Community Group) <ul style="list-style-type: none"> Add to alumni group 	COMPLETE
	<ul style="list-style-type: none"> NEW! Plan for potential Alumni book club/journal club 	Not started

	<ul style="list-style-type: none"> ● NEW! Informational interviews 	COMPLETE
	<ul style="list-style-type: none"> ● NEW! Begin working on material for next round of call for applications 	COMPLETE
	<ul style="list-style-type: none"> ● Launch call for applications (for 2024 – list AAMC/Nov. workshop dates) <ul style="list-style-type: none"> ○ send to STFM, NAPCRG, AFMRD, and others to share ○ Send to CCFP (?) AAPL (?) 	COMPLETE
April	<ul style="list-style-type: none"> ● Weekly meetings 	COMPLETE
	<ul style="list-style-type: none"> ● Plan for June 	COMPLETE
	<ul style="list-style-type: none"> ● Scope out date for November Workshop 	COMPLETE
	<ul style="list-style-type: none"> ● Begin planning July workshop 	COMPLETE
May	<ul style="list-style-type: none"> ● Weekly meetings 	COMPLETE
	<ul style="list-style-type: none"> ● Plan for June/July/August 	IN PROGRESS
	<ul style="list-style-type: none"> ● Prep call for mentors 	Not started
	<ul style="list-style-type: none"> ● Plan July workshop 	IN PROGRESS
	<ul style="list-style-type: none"> ● Send out directions for leadership interviews due in October 	COMPLETE
	<ul style="list-style-type: none"> ● NEW! Begin to prepare report for ABFM Foundation (due July 1) 	IN PROGRESS
June	<ul style="list-style-type: none"> ● NEW! Draft LEADS mid-year report cards 	IN PROGRESS
	<ul style="list-style-type: none"> ● Weekly meetings 	COMPLETE
	<ul style="list-style-type: none"> ● Plan for July/August/September 	IN PROGRESS
	<ul style="list-style-type: none"> ● Plan July workshop 	COMPLETE
	<ul style="list-style-type: none"> ● Send reminder re: call for applications 	COMPLETE
July	<ul style="list-style-type: none"> ● Weekly meetings 	COMPLETE
	<ul style="list-style-type: none"> ● Plan for August/September/October 	IN PROGRESS
	<ul style="list-style-type: none"> ● Report to ABFM Foundation due July 1 (due 8/25/23) 	Not started

	<ul style="list-style-type: none"> ● Call for applications due - beginning of July 	COMPLETE
	<ul style="list-style-type: none"> ● Launch call for advisers (as needed) 	Not started
	<ul style="list-style-type: none"> ● Send applications to reviewers with instructions 	COMPLETE
	<ul style="list-style-type: none"> ● Begin planning November Workshop 	COMPLETE
	<ul style="list-style-type: none"> ● Create evaluation for application review 	COMPLETE
	<ul style="list-style-type: none"> ● Ask Leader Development committee for application reviewers 	COMPLETE
	<ul style="list-style-type: none"> ● NEW! Summer Workshop in Denver (2022) - policy and personal growth focused - use Disc 	COMPLETE
August	<ul style="list-style-type: none"> ● NEW! Share LEADS mid-year report cards 	IN PROGRESS
	<ul style="list-style-type: none"> ● NEW! Survey LEADS alumni 	IN PROGRESS
	<ul style="list-style-type: none"> ● Weekly meetings 	IN PROGRESS
	<ul style="list-style-type: none"> ● Plan for September/October/November 	IN PROGRESS
	<ul style="list-style-type: none"> ● Plan November workshop 	IN PROGRESS
	<ul style="list-style-type: none"> ● NEW! Scholarship considerations 	IN PROGRESS
	<ul style="list-style-type: none"> ● NEW! Send mid year eval (due mid-August) 	COMPLETE
	<ul style="list-style-type: none"> ● Notify applicants that were selected / request contracts & send invoices [email] 	Not started
September	<ul style="list-style-type: none"> ● Weekly meetings 	Not started
	<ul style="list-style-type: none"> ● Plan for October/November/December 	Not started
	<ul style="list-style-type: none"> ● Plan November workshop (should have session/panelists set) 	Not started
	<ul style="list-style-type: none"> ● Contracts due (1 month later from original request) 	Not started
October	<ul style="list-style-type: none"> ● Weekly meetings 	Not started
	<ul style="list-style-type: none"> ● Plan for November/December/January 	Not started
	<ul style="list-style-type: none"> ● Plan November workshop 	Not started

	<ul style="list-style-type: none"> ● Begin planning Feb Workshop (during Annual Conf.) 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Request from incoming cohort: self-eval; bios (long bio/professional bio); photo [email] 	<i>Not started</i>
November	<ul style="list-style-type: none"> ● Weekly meetings 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan Feb Alumni event 	<i>Not started</i>
	<ul style="list-style-type: none"> ● AAMC Conf/November workshop/NEW! Alumni event at AAMC 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan for December/January/February 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan Feb workshop 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Begin to prepare report for ABFM Foundation (due Jan 1) 	<i>Not started</i>
	<ul style="list-style-type: none"> ● NEW! Virtual Alumni event (after AAMC) 	<i>Not started</i>
December	<ul style="list-style-type: none"> ● Weekly meetings 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan for January/February/March <ul style="list-style-type: none"> ○ Set up registration and included sessions: <ul style="list-style-type: none"> ▪ LDC Precon ▪ New Chair 101 (outgoing year) ▪ Leadership and management dilemmas 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Debrief AAMC/Workshop 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan Feb workshop 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Prep current cohort for ignite talks & Annual Conference 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Prep incoming cohort for Annual Conference 	<i>Not started</i>
January	<ul style="list-style-type: none"> ● Weekly meetings 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan for February/March 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan Feb workshop 	<i>Not started</i>

	<ul style="list-style-type: none"> ● Notify Kim to remove previous cohort from listserv/email previous cohort that they will be leaving the listserv and can join as an associate member 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Notify current cohort that they will remain on the listserv for a year/can become associate member after or at any time 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Request self eval; project updates from current cohort 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Payment for incoming cohort due 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Report to ABFM Foundation due Jan 1 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Send competencies to chairs to assess incoming group 	<i>Not started</i>
February	<ul style="list-style-type: none"> ● Current cohort: Weekly meetings wrap up 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Plan for February/March 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Finalize incoming cohort ADFM page 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Incoming cohort: Self-eval; bios (long bio/professional bio); photo; project updates due 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Current cohort: Project updates; self eval due 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Feb workshop & ADFM Annual Conf. 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Incoming cohort starts at Annual Conference 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Cohort chairs: complete end of the year assessment of fellow 	<i>Not started</i>
	<ul style="list-style-type: none"> ● Outgoing cohort wraps up 	<i>Not started</i>
	<ul style="list-style-type: none"> ● EVAL: Consider publication on history of leads w/ first bout of alumni survey data 	<i>Not started</i>

APPLICATION PROCESSES CHECKLISTS

Launch Call for apps checklist:

- Update application **as needed** (3 google forms: 1) application (word version as well) 2) support from chair form 3) support from sponsor form)
- Review/update rubric **as needed** (make sure it ties into the application)
- Communication for listserv
- Updating the site
- Send to sister orgs
 - ~~STFM (Emily N & Traci) [Jessie Sending] (x2)~~
 - ~~NAPCRG (Leyla) [Jessie Sending] (x2)~~
 - ~~AFMRD (Mikayla Moroe — mmoreau@aafp.org / Kathleen marshall — KMarshall@aafp.org) [Jessie Sending] (x2)~~
 - ~~AAFP (Chexmix) [Sam Sending]~~
 - ~~Alumni [Jessie Sending]~~
 - ~~ACOFB (Amanda sending)~~
 - ~~Canadians (Amanda sending)~~
 - ~~Saby K @ HCA (Amanda sending)~~
 - ~~Medical Student Educator Director Institute (MSEDI) STFM (Emily N & Traci) [Jessie Sending]~~
 - ~~DEI Directors [Sam Sending]~~
 - ~~Research Directors [Sam Sending]~~
 - ~~Minority & Multicultural Education Collab in STFM (Emily N & Traci) [Jessie Sending]~~
 - ~~AHME (Amanda asked Tochi to pass to their Pres/Board chair, Jessie sent her the info)~~
 - ~~Dallas Group (? — Kirsten R) (Amanda sending)~~
 - ~~Interested parties form [Jessie Sending]~~
 - ~~National Hispanic Medical Association / NMA or any other groups that serve those underrepresented in medicine [Sam reach out to Jose] Reached out in March and in late May~~

Close call for apps checklist:

- Create google folders for each applicant and make sure they have all relevant material (all 3 apps; CV)
- Assign reviewers (at least 2 + fellowship director reviews all)
- Send link to applications and rubric to reviewers (allow at least 1 month to review)

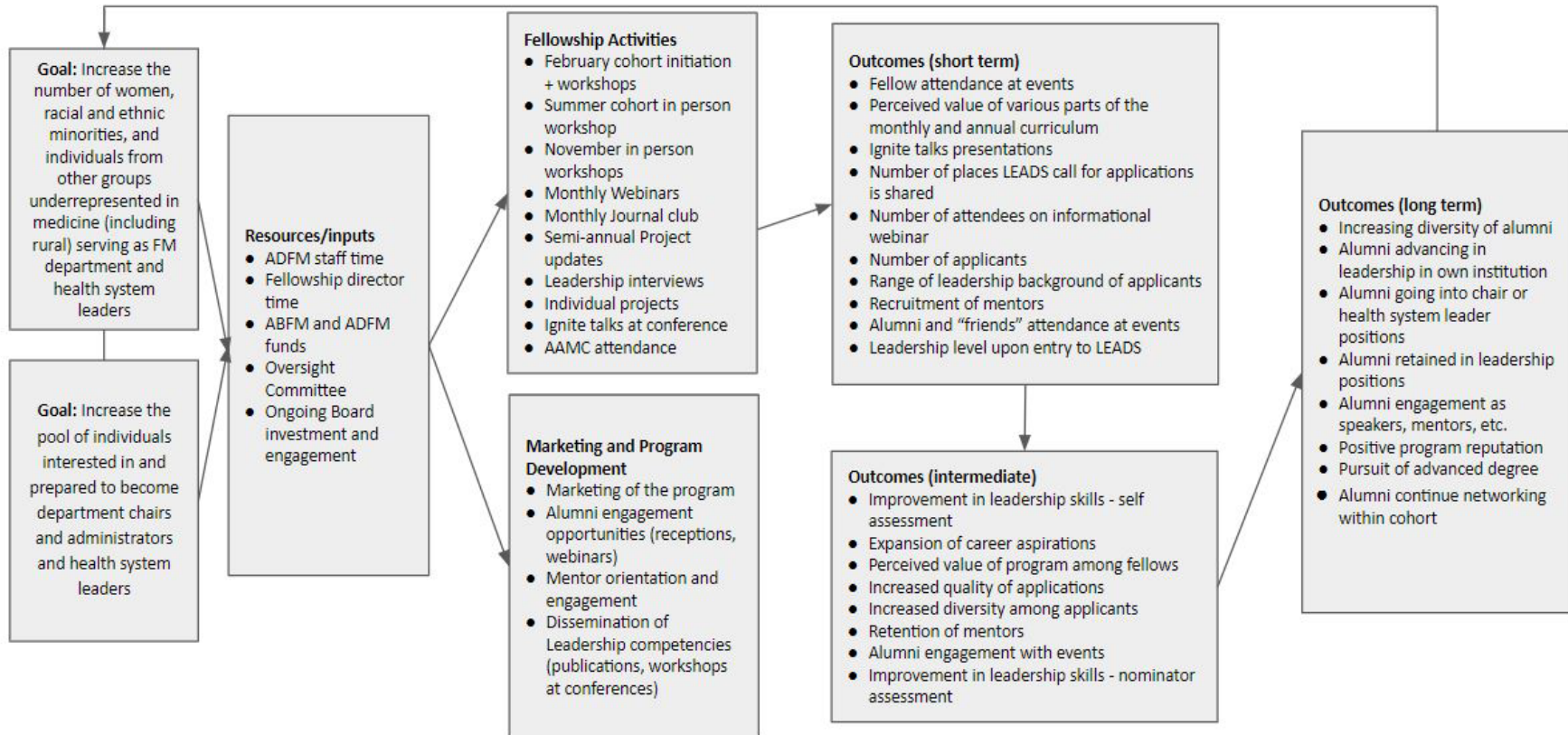
Post application review checklist:

- Notify approved and rejected applicants
- Request contract (1 month deadline)
- Request invoice (4 month deadline)
- Request pre-year material: short bios; long bios; headshots; self-assessment; Disc assessment
- Provide details on key dates and weekly meetings

Problem statement: The LEADS fellowship will train pluripotent leaders to have the skills/understanding of a high level leadership position like a department chair and who would also be competitive for other leadership positions beyond the scope of their current role within health systems.

OUTPUTS

OUTCOMES



LEADS Alumni Surveys

SURVEY #1 – LEADS Alumni

Blurb: In 2019 ADFM received funding from the American Board of Family Medicine Foundation to expand the Leadership Education for Academic Development and Success (LEADS) Fellowship. The fellowship expansion kicked off in February of 2021. The following survey is intended to be completed by those who took part in the program since 2019, the time of the program's expansion.

We're super excited to hear from you and where you've landed since the fellowship! Your responses will inform our assessment of the overall impact of the program on a long-term scale and help us continue to adjust to meet incoming fellows' needs.

Questions:

1. Your name.
2. Years of your fellowship cohort.
 - 2019-20
 - 2020-21
 - 2021-22
 - 2022-23
3. Your current institution.
4. Your current role title.
5. Has your role changed to include a new or different leadership position since the fellowship?
 - Yes
 - No
6. If yes, please list the new roles you've taken on since the year you started the fellowship; please include where these roles are/were held and when you took on these roles.
7. Please check all the below options that led you to make these changes to your career.
 - Family issues
 - Compensation/benefits
 - Promotion/career advancement
 - Different organization (i.e. bigger or academic)
 - Chance to grow
 - Chance to have different responsibilities
 - More autonomy
 - Different part of the country
 - Other (specify)
8. Let us know how much you agree with this statement is: My participation in the LEADS program played a role in my career decision making.
 - 5 Strongly Agree

- 4 Agree
 - 3 Neutral
 - 2 Disagree
 - 1 Strongly Disagree
9. Please describe which part of LEADS was most helpful with making this career decision.
10. Please describe any additional training (such as a master's degree, certificate program such as MBA, or leadership development program, such as ELAM or AAMC) you've started or completed since the years you did the fellowship.
11. In your opinion, what was the most valuable component of the LEADS fellowship?
12. Given the tuition, travel costs, and time required for LEADS, it was worth the investment.
- 5 Strongly Agree
 - 4 Agree
 - 3 Neutral
 - 2 Disagree
 - 1 Strongly Disagree
13. Do you have regular contact with your LEADS cohort or your LEADS chair advisor or LEADS faculty (faculty advisor or director) (email or phone call about twice a year or more often)?
- I have regular contact with others in my cohort and my chair advisor or LEADS faculty.
 - I have regular contact with others in my cohort only.
 - I have regular contact with my chair advisor or LEADS faculty only.
 - I do not have regular contact with others in my cohort or my chair advisor or LEADS faculty
14. Would you be interested in staying engaged with LEADS through any of the following programming or opportunities:
- Attending webinars
 - In-person events
 - Listserv discussions
 - Book club or journal club
 - Volunteering to present at a LEADS webinar or workshop
 - Volunteering to provide brief consultation to a LEADS fellow (e.g. on their project)
 - Other (specify)

SURVEY #2 – "Pre-LEADS" Alumni

In 2019, ADFM received funding from the American Board of Family Medicine Foundation to expand the ADFM fellowship into what is now known as the Leadership Education for Academic Development and Success (LEADS) Fellowship. The fellowship expansion kicked off in February of 2021 with substantial changes to the fellowship structure and curriculum.

The following survey is intended to be completed by those who took part in the program prior to the fellowship expansion in 2021. We're super excited to hear from you and where you've landed since the

fellowship! Your responses will inform our assessment of the impact of the program on a longer-term scale and help us continue to adjust the curriculum to meet incoming fellows' needs.

Questions:

1. Your name.
2. Years you took part in the fellowship.
3. Your current institution.
4. Your current role title.
5. Please list any new roles you've taken on since the year you started the fellowship; please include where these roles are/were held and when you took on these roles.
6. Do you find the alumni listserv helpful? Alternative question based on Val's comments: How often do you read the LEADS alumni listserv?
 - a. I read it whenever there's a post
 - b. I read about half the posts
 - c. I never read the posts
15. Would you be interested in staying engaged with LEADS through any of the following programming or opportunities:
 - Attending webinars
 - In-person events
 - Listserv discussions
 - Book club or journal club
 - Volunteering to provide brief consultation to a LEADS fellow (e.g. on their project)
 - Presenting at LEADS webinar or workshop
 - Other (specify)



Thursday, March 9, 2023

Greetings,

I am writing to you to update you on some improvements to the LEADS fellowship and to ask for your specific engagement with your LEADS fellow over their fellowship year.

We are continually working to improve LEADS through feedback and input from our fellows, the LEADS Oversight committee, and the ADFM Leadership Development Committee. This year we decided we wanted to more intentionally engage the chairs who are sponsoring a LEADS fellow. The purpose is to tap into a sponsoring chair's experience and wisdom as a senior executive leader, to help mentor and guide their fellow's leadership development. And because sponsoring a LEADS fellow is a significant department investment, both financially and in release time, we will be providing mid-point feedback on the fellow's progress to the sponsoring chair.

We are asking sponsoring chairs to engage and support their fellow in the following ways:

- Assess the leadership competencies of your LEADS fellow using the ADFM Senior leadership competencies assessment for sponsoring chairs. We will ask you to repeat this assessment at the end of the LEADS fellowship year.
- Discuss with your fellow, your assessment and their self-assessment of their leadership competencies and their leadership development goals. Fellows repeat their self-assessment at the end of their LEADS fellowship year. We hope this will form a foundation for leadership development planning, mentoring, and guidance of your fellow over the course of their fellowship year.
- The chairs' leadership assessments of their fellows and the fellows' self-assessments will each be aggregated and shared back with the sponsoring chairs and fellows as aggregate de-identified data.
- Meet quarterly with your fellow to check-in with the fellow's experience and progress in the LEADS fellowship, and with their LEADS project. This will help the chair facilitate their fellow's engagement with LEADS and their leadership development, as well as accomplishing their project.

- Sometimes, a fellow finds it necessary to change or modify their original LEADS project/project plan. We now require the fellow to discuss proposed changes to their LEADS project with their sponsoring chair as well as their LEADS learning community advisor to ensure the proposed changes will be supported by the department, and are still focused on developing specific leadership competencies.
- Midway through the fellowship, the LEADS core faculty will provide the sponsoring chair with a progress report.
- If possible, please attend the LEADS graduation to help recognize and celebrate your fellow's achievement. Graduation is on the morning of the pre-conference day of the ADFM meeting (usually a Wednesday).

Another LEADS improvement for this year: we are piloting a new role of LEADS "faculty consultant." This role is to provide short-term and focused consultations (e.g., 1-2 sessions) to individual fellows requesting support or guidance on a specific topic beyond the core LEADS activities and resources of core LEADS faculty and staff (e.g. health system leadership, lived experience of being a minority in academic medicine, developing a research program, etc.). Fellows are directed to/connected with the faculty consultant by LEADS core faculty or staff. If you are interested in also serving as a faculty consultant, please let us know and we can provide more information.

From the LEADS core faculty and staff, we thank you again for sponsoring a LEADS fellow. We welcome your thoughts, input or questions about LEADS and our request for your engagement with your fellow as a sponsoring chair.

Sincere regards,



Myra Muramoto, MD, MPH
Director, ADFM LEADS Fellowship

APPENDIX B

ADFM Program Assessment: Current Status as of May 2023

Program	Program goal	When it started	Participation	Budget implications (minimal/moderate/major)	Staff effort (minimal/moderate/major)	Who steers? [staff lead]	Outputs to date (if applicable)
Annual conference	Bring ADFM members together for networking and sharing about issues related to creating excellent DFMs	Since the beginning!	To date max of about 250 attendees	Major; this is the largest expense in our budget besides staff and also the largest source of income after dues	Major!! Greatest staff list of any programming	Program Planning Committee + Chair/Co-chair Triad, lots of input from staff [Jessie Vera]	Very positive annual evaluations of the offerings
Interim chair hotline	To provide a line of support for interim chairs.	2013	Minimal, can't remember the last time we had a request	Minimal; almost \$0	Minimal	Leader Development Committee [Sam Elwood]	none
New Chair Advising Program	To connect new chairs and interim chairs with experienced chairs in order to introduce them to ADFM's offerings, to help them grow their network of chair peers and provide a line of support.	Revamped in late 2022	8 pairs between Jan - May, 2023	Minimal	Moderate; Staff time plus volunteer chair advisor time	Leader Development Committee [Sam Elwood]	Some informal evaluation; positive anecdotal feedback
New Chair workshop at	Prepare new chairs for challenges, expectations,	1991-1998, 2012-	Max 10 new chairs per	Moderate; ADFM pays for	Minimal from ADFM	MU team, some input from LDC	Evaluation results

the University of Missouri	responsibilities of their role	current	workshop	ED and consultant travel, hotel		[Amanda Weidner]	consistently positive
Leadership Development presentations (precon at ADFM, session at STFM, etc)	Interactive sessions meant to provide opportunities for leadership development.	Since about 2016; part of their strategic workplan	Varies depending on venue.	Minimal	Moderate; Staff time plus volunteer committee members' time	Leader Development Committee [Sam Elwood]	Evaluation results usually quite positive
New Chair 101 workshop	Interactive session during the ADFM Annual Conference intended to provide new chairs with opportunities for leader development in topic areas relevant to them and provide a network of peer support and	Since about 2016; part of their strategic workplan	Usually see 12+ participants	Moderate; This is a paid event to cover lunch costs	Moderate; Staff time plus volunteer committee members' time	Leader Development Committee [Sam Elwood]	Evaluation results usually quite positive
Administrators' preconference	Provide networking time for administrators and programming specific to their role	Since 2010	About 30-40 participants each year	Moderate; This is a paid event to cover costs	Minimal; small amount of staff time, mostly volunteer planning	Administrators' Steering Committee and precon chair/co-chair [Amanda Weidner]	Evaluation results usually quite positive
Administrators' peer partner program	To connect new administrators with experienced administrators in order to provide a line of support and introduce them to ADFM's offerings.	Revamped in early 2023; original 2015	9 pairs since beginning of 2023	Minimal	Moderate; staff time plus volunteer administrator peers' time	Administrators' Steering Committee and membership chair/co-chair [Sam Elwood]	Some informal evaluation; positive anecdotal feedback

BRC overall	BRC was created to strengthen research capacity within academic family medicine and does so with the following subcommittees: ongoing curricular offerings (e.g. workshops at NAPCRG, ADFM, and other conferences); a consultation service; a fellowship program; and an evaluation and assessment arm.	2014	There are 19 members across the subcommittees, including the ADFM & NAPCRG Executive Directors and one staff person for a total of 20.	Moderate overall, major for specific activities (see below)	Major; While each piece of BRC is moderate, combined and overall it is a major use of staff time.	BRC Steering Committee which is co-lead by ADFM and NAPCRG [Jessie Vera, Amanda Weidner]	BRC includes and Assessment & Evaluation Committee; lots of data on what has/hasn't worked; in the process of a longitudinal outcomes evaluation
BRC consultation program	The BRC consultation service goal is to provide guidance on a range of different research-related department inquiries or issues, such as: very specific problem-solving like recruitment and leadership issues to the development of a broad multi-year strategic plan.	The first exploratory consultation (pre-work to consultation) took place in 2017, however the first full consultation occurred in 2018.	15 exploratory conversations, 10 complete consultations, 2-3 current prospective	Major; full consultations have paid contracts, consultants are paid	Minimal. Staff really acts here to track and connect, and let the consultants take the reigns.	BRC Consultation Subcommittee chair and sub-committee members [Jessie Vera, Amanda Weidner]	See above
BRC fellowship program	To equip individuals with the knowledge, leadership skills, mentorship, and peer support to develop	The fellowship began in 2021 (after	The first year fellowship had 13 fellows, likely due to	Major; fellows pay tuition, faculty receive honorarium	Moderate. Only one staff person takes on the BRC	BRC Fellowship Co-Directors & faculty team [Jessie Vera]	See above

	and implement a strategic plan for building research capacity within their own programs, departments, or institutions.	an earlier pilot year with 1 fellow)	pent up demand. The second year held 5 active participants and 1 auditing fellow	and some travel support	fellowship, but it does require a healthy amount of time especially in the beginning and end of the fellowship cycle (November/November)		
LEADS fellowship	The ADFM LEADS fellowship is a 1-year program designed for mid-to-late career family medicine leaders interested in pathways to leadership in academic or other health systems, including department chair, or who want to further explore if these roles would be a good career fit.	Revamped in 2019	23-24 Cohort includes 13 fellows	Major; fellows pay tuition, we pay fellowship director FTE, faculty honoraria, expenses for in person events, etc	Major	LEADS Director, ADFM Staff and LEADS Faculty [Jessie Vera & Sam Elwood]	We have data on how many fellows have gone on to become chairs; currently working on baseline longitudinal evaluation
Physician Scientist Pathway pilot	pilot program intended to meet the needs of those who wish to pursue a career of independently-funded research without having a "gap" in research training during the years of residency	2017	7 pilot sites, very few participants in program to date	Minimal	Minimal	PSP Advisory Board & site leads [Amanda Weidner]	None yet

AAMC's ORR representative nominations	Leadership development opportunity for residents	?	ADFM has 2 representative s to the ORR	Moderate; we pay for dinner and waive registration to ADFM conf	Minimal; staff tracking of nominations and Exec Comm review	ADFM Exec Committee, LDC Chair, AFMRD Pres [Amanda Weidner]	?
DEI Director & Chair meetings	Quarterly meetings intended to provide a space for chairs and their DEI directors to connect over timely DEI related issues.	Fall 2022	30+ participants during each meeting and a email group list of 70+ members	Minimal	Moderate; Staff time plus volunteer meeting planner/moderators' time	DEI Committee [Sam Elwood]	Feedback and brief post-meeting evals positive
Research Director & Chair meetings	Quarterly meetings intended to provide a space for chairs and their research directors to connect over timely research related issues.	Revamped in 2020	30+ participants during each meeting and a email group list of 110+ members	Minimal	Moderate; Staff time plus volunteer meeting planner/moderators' time	Research Development Committee [Sam Elwood]	Feedback and brief post-meeting evals positive
Hot topic discussions quarterly series	Quarterly webinars intended to provide a space for ADFM members and those who would benefit from attending in service to their department to connect and learn about a timely topic, usually with a healthcare delivery focus.	2020	20+ participants during each meeting	Minimal	Moderate; Staff time plus volunteer presenters' time	Healthcare Delivery Transformation Committee [Sam Elwood]	Feedback and brief post-meeting evals positive
Administrators'	Provide a forum for	Approx	Usually about	Minimal	Minimal; staff		Anecdotal

quarterly meetings	administrators' group to meet more often than just at the conference for networking and hot topics discussions	2019	10+ admins participate		help track topics and facilitate as needed	[Amanda Weidner]	feedback that these are helpful
Open chair position list	To provide a list of chair openings across the country in hopes of spreading the word to prospective candidates.	Revamped in 2022	???	Minimal; opportunity for \$\$?	Moderate; Staff time	Leader Development Committee [Sam Elwood]	Not sure but much easier for us to track with a transparent list!
Quarterly newsletter	To provide ADFM members with an update of current ADFM offerings and happenings. This is also time to share sister organization shout-outs.	Since 2012	Received by membership	Minimal; we use free version of MailChimp	Moderate	[Jessie Vera]	? Past issues are tracked and posted to site
Survey efforts	Meant to support ADFM strategic efforts whether thats informing the strategic committee SMART goals, ADFM services or conference planning.	First recorded 2004 but know there were others before that	Responses have been declining over the last 3 years; ranges between 43-57% response rate	Minimal but we pay for SurveyMonkey	Moderate; staff time	Various committees [Sam Elwood]	These data have been invaluable for planning and better meeting members' interests and needs. Past reports posted to website.
Research strategic plan/Summit project	The intention of this process is to bring the discipline together around a draft strategic plan.	2020	Working to meaningfully engage and involve as many people	Major; grant funding from ABFM-F	Major	Amanda, Sam and Irf as Chair of Research Development Committee [Amanda Weidner]	TBD...

			as possible				
Dissemination of efforts	Sharing out of our data	ongoing	n/a	Minimal	Moderate to major, depending on project	Various groups and committees [Sam Elwood and Amanda Weidner]	See “commentaries” and “additional publications” tabs on website for examples

Strategic and operational efforts:

- Board of Directors
- Executive Committee
- Finance Committee
- Membership Committee
- Nominations Committee
- Administrators’ Steering committee
- Strategic committees
 - Leader Development
 - Healthcare Delivery Transformation
 - Research Development
 - Education Transformation
 - Advocacy
 - Diversity, Equity, Inclusion
- Conference Program Committee
- Conference “triad” leadership group
- CAFM (participation and staffing)
- FMLC planning
- Commentary in each issue of *Annals of Family Medicine*
- Advocacy and legislative efforts through AFMAC/CAFM

APPENDIX C



ADFM REPORT TO FMLC July 2023

Greetings colleagues!

ADFM is looking forward to co-hosting the 2023 FMLC meeting in Milwaukee, Wisconsin!

The main strategic efforts of ADFM are undertaken by our ADFM Strategic Committees, and more on the main initiatives of these 6 committees is described below.

We are in the process of reviewing and revising the strategic efforts of these groups with input from the Board and in the committees themselves. The ADFM Board of Directors spent time on strategic planning in February 2023, at their in person meeting in conjunction with the ADFM Annual Conference, specifically exploring what might be missing in our current efforts and on areas that are broader than any one of our committees.

Additionally, the board voted to incorporate [the SMARTIE goal framework](#) (vs just SMART goal framework) into the goal setting process - adding an emphasis directly into the goals on inclusion and equity. Since then, all of the committees have been reworking their goals into the SMARTIE goal framework and the Board has continued to narrow in on its focus for changes to the overall strategic workplan. The goal is to have a full package to review at the November board meeting.

Additionally, while this strategic planning has been going on, the committees started to make progress on their proposed goals so as to not lose momentum or time. Below gives some updates on the efforts of ADFM by committee/priority area since February 2023.

I. DIVERSITY, EQUITY, AND INCLUSION

Elisabeth (Beth) Wilson, MD, MSPH-ED, MPH, took over leadership of the DEI Committee in July. For the first time within an ADFM strategic committee, we are piloting the addition of a committee vice chair, with Shalina Nair, MD, serving in this capacity. Based on how this new structure goes, there's a possibility of extending the opportunity to the other strategic committees and using the opportunity as a leadership development opportunity for our Associate Members, who are not currently eligible to serve as Committee Chair.

Under this new structure, , the committee continues to work on their SMARTIE goals around creating a framework for measuring DEI efforts and improvements in a department's practice, workforce, and learning environment; this framework will be structured so that departments can choose from among a menu of example metrics to find what is meaningful to them and then can use these metrics to measure their baseline and track progress. They plan to publish

this effort as a way to provide an easily accessible framework for all who are interested. The committee hosted a workshop at the 2023 ADFM Annual Conference that showcased some sample departmental DEI dashboards and metrics and allowed participants to explore their own options. This event was well received and has informed their paper. The committee also helped advise on a session for the 2023 ADFM Annual Conference on being an anti-racist leader. The committee continues to review the ADFM anti-racism action plan and acts as an oversight group for ADFM's role in the FM-CAR initiative.

Additionally, they continue to support the meetings of the DEI Directors and Department Chairs, this group has met twice since the beginning of January. Led by Cleveland Piggott, MD, MPH, Vice Chair of DEI at the University of Colorado and a volunteer planning group including Brian Park, MD, Family Medicine Department Director of DEI at Oregon Health & Science University and Christina Kelly, MD, at Uniformed Services University of the Health Sciences, the purpose of these meetings is to provide an opportunity for networking and to create a forum for discussion of key issues that many in the "DEI lead" role face. The January 2023 meeting included a panel on addressing issues of DEI and disparities in professional development and promotion for staff and faculty and the April 2023 meeting included another panel discussion specifically on incorporating DEI into a department's strategic plan.

II. LEADER DEVELOPMENT

The Leader Development Committee hosted several sessions in the first half of 2023, starting with a pre-con during the 2023 STFM MSE Conference titled: "So You Want to Be a Family Medicine Leader? Here Are the Tools That You Need!" and a case-based session during the 2023 STFM Annual Conference using the [leadership competencies](#). For the 2023 ADFM Annual Conference in February, a subgroup developed a workshop for new chairs as well as a pre-conference on succession and transition planning (informed by responses to questions included in the ADFM summer quarterly survey). Additionally, members of this committee joined a planning group with members of the ADFM Healthcare Delivery Transformation Committee to plan a session for the ADFM conference on "the changing role of the chair and department administrator at academic health centers."

In line with the ADFM Board's wishes, the committee continues to explore ways to provide and collaborate on leadership development and offerings for family medicine faculty across the career spectrum, including junior faculty, mid-career faculty, leaders stepping into positions beyond the chair role, new and interim chairs, and lifelong members, among others. They hope to develop a SMARTIE goal related to these efforts to better capture them in the strategic workplan. They continue to evaluate ways to assist with the [open chair positions](#).

The ADFM Leader Development Committee continues to circulate and update the following resources that can all be found on the resource toolbox page under "ADFM-generated resources"

- [Leadership, Coaching, and Mentorship Programs List](#)
- [Executive Coaching Recommendation List](#)
- [Leadership Resources List](#)

Ila. LEADS Fellowship

The [ADFM LEADS fellowship](#) is a 1-year program (February to February) designed for mid- to late-career family medicine leaders interested in pathways to leadership in academic or other health systems, including department chair, or want to further explore if these roles would be a good career fit. This year (2023) was the second year of the expansion of the LEADS fellowship program funded by the ADFM Foundation.

Similar to 2022, the 2023-24 cohort maintains the weekly structure we added in the last two years that fosters excellent discussions, journal clubs, project check-ins, and webinars on a rotating basis. We use a “learning community” structure with a designated mentor for each group of 6 to 8 fellows, and some additional workshops and assignments, including a series of leadership interviews. This year we also requested that the sponsoring chairs complete an assessment of their fellow’s leadership competencies (similar to a self-assessment we have the fellows complete at the beginning and end of their year). The purpose of this is for them to get more encompassing feedback and to better communicate to the chairs that this fellowship is an investment. Near the end of July, we are excited to host our first summer workshop at the Fellowship Director, Myra Muramoto’s, home institution of University of Colorado. Sessions during this three day event will focus on advocacy and policy, strategic planning, and strategic communication and will provide ample time for cohort bonding.

We are also nearing the end of our open call for applications for the 2024-25 LEADS Cohort (deadline is July 11, 2023). In order to market this opportunity more broadly, LEADS staff attended the STFM Annual Conference in May as a partner. Their booth received a lot of interest and we’re hoping this will lead to even more applicants. Please continue to promote this opportunity to any of the senior leaders you know who might like further development before their next roles!

Lastly, we’ve started digging into the work around our long term evaluation plan, starting with a more structured approach to having our fellows evaluate the fellowship at the mid-year and end of the year point. We’re also in the process of surveying alumni who participated in the fellowship when it was re-structured, enhanced, and re-branded as LEADS (starting in 2019) as well as those who participated in it prior to this change (before 2019).

III. HEALTHCARE DELIVERY TRANSFORMATION

As a follow up to the 2022 ADFM Annual Conference session titled, “Sustaining Support for the Academic Mission with Increasing Clinical Demands,” members of the Healthcare Delivery Transformation Committee in partnership with the Leader Development Committee hosted a panel discussion at the 2023 Annual Conference on “the changing role of the chair and department administrator in academic health centers.”

Additionally, the committee has hosted ADFM “Hot Topic” Discussions on a quarterly basis for the last year. The most recent session was on April 3 with Dr. LaShawn McIver, Director of the Office of Minority Health at CMS. The goal of this session was to learn more about the CMS Framework for Health Equity and how our members can get involved and help drive this work forward. They are now gearing up to host their next hot topic discussion on telehealth in academic medical centers with guests from the AAMC joining to discuss a recent report generated in partnership with Vizient, [Effective Strategies for Sustaining and Optimizing](#)

[Telehealth in Primary Care](#). During their June meeting, they met with the new AAMC Director of Clinical Innovations, Lisa Chew, MD to plan for this session and discuss other opportunities to partner with Dr. Chew and the AAMC.

Along with updating their goals to be more in line with the SMARTIE Goal framework, the committee is considering adding a goal related to developing ways for family medicine departmental leaders in clinical operations to connect (specifically similar to what ADFM does for research and DEI directors with their quarterly meetings), starting with a discussion at their August meeting.

IV. EDUCATION TRANSFORMATION

The ADFM Education Transformation Committee welcomed their new chair, Deb Clements, MD, in May. Under this new leadership and per the Board's wishes, the committee is reviewing their past goals and considering new areas to incorporate into their strategic workplan. One area the Board is particularly interested in this committee exploring is drumming up/advocating ways to ensure quality in both UME and GME programs. Some other directions the committee is considering include: follow up on a project exploring Match numbers compared to what departments say they are offering in terms of educational programming; an ongoing conversation about how to move the efforts on specialty disrespect forward; and whether/how we might structure the Student Choice Learning and Action Network (SCLAN) idea that evolved from the 25x2030 effort. There's a chance one of these topics would lend themselves to a session at the 2024 ADFM Annual Conference. The committee was also interested in developing a proposal for a session at the 2024 STFM Annual Conference.

V. RESEARCH DEVELOPMENT

The ADFM Research Development Committee continues to capitalize on their quarterly research directors and chairs meetings that focus on opportunities for networking and focused discussion. Since January, these meetings have largely been used to inform the ongoing work of the national effort on strategic planning for research and the upcoming Research Summit. As a reminder (we will discuss much more at the FMLC meeting), ADFM in partnership with NAPCRG have been funded by the ABFM Foundation to plan and host a research summit in conjunction with the 2023 NAPCRG Annual Conference, with the goal of developing a road map and a strategic plan for research in the discipline for the next 10 years or by 2030. This work kicked off in February of 2023 at the FMLC meeting and so far has allowed for many opportunities for engagement across the discipline. Clarus Group, the consultants engaged to help with this work, held a series of interviews and focus groups around the current future state of research in the discipline and we conducted a survey to gather additional data in addition to these discussions. After these data gathering efforts, we stood up a planning committee for the summit, and have kicked off a paper writing process that will lead to a special edition of a family medicine journal. We look forward to sharing and discussing more at the meeting in Milwaukee!

Additionally, in hopes of continuing to foster an atmosphere of collaboration and information sharing, the committee continues to add research related updates, including funding and project opportunities and success stories in the quarterly ADFM newsletter.

Va. BUILDING RESEARCH CAPACITY INITIATIVE

The ADFM and NAPCRG teams that co-sponsor BRC, and the BRC Steering Committee made up of these individuals as well as representatives from AFMRD and STFM, have continued steps toward formalizing our structures and processes. More about the BRC initiative and programming can be found [here](#)!

The second fellowship cohort of the new BRC fellowship started their fellowship year at NAPCRG in November. The goal of this fellowship is “to equip individuals with the knowledge, leadership skills, mentorship, and peer support to develop and implement a strategic plan for building research capacity within their own programs, departments, or institutions.” We look forward to having the fellows final project presentations as part of the NAPCRG conference agenda this year! [Applications for next year’s cohort](#) close on July 31, please share the information with anyone who might be interested!

VI. ADVOCACY

The Advocacy Committee welcomed their new chair, Wayne Altman, MD, in April. Wayne kicked off his tenure by continuing discussion on developing some sort of informal consultation service on advocacy that ADFM members could take advantage of. The committee also worked with Nina DeJonghe, the new Government Relations Director and ADFM staff to explore ADFM maximizing its use of VoterVoice, an online advocacy messaging platform. In terms of updating their goals, the committee recently revised their goals in winter of 2022 and is waiting to receive direction from the Board on other areas they should focus on.

The committee continues to add to their [page on the ADFM website](#) that highlights their initiatives, advocacy resources, and advocacy case studies they’ve received from family medicine departments. Specifically, under the “ADFM-generated section,” they recently added slides that breakdown ADFM’s role with advocacy. We are very proud of committee member (and AAFP President) Tochi Iroku-Malize, MD, MPH, MBA for winning this year’s STFM Advocate Award!

APPENDIX D

ADFM STRATEGIC WORK PLAN

Updated: 9/21/23

TABLE OF CONTENTS

RELATED MATERIAL: <ul style="list-style-type: none">• STRATEGIC WORK PLAN 1-PAGER• 2022-23 HIGHLIGHTS• SMARTIE GOALS FRAMEWORK• ARCHIVE	<ul style="list-style-type: none">• OVERARCHING STRATEGIC GOALS STRATEGIC COMMITTEE SMARTIE GOALS: <ol style="list-style-type: none">1. ADVOCACY COMMITTEE2. DIVERSITY, EQUITY AND INCLUSION COMMITTEE3. EDUCATION TRANSFORMATION COMMITTEE4. HEALTHCARE DELIVERY TRANSFORMATION COMMITTEE5. LEADER DEVELOPMENT COMMITTEE6. RESEARCH DEVELOPMENT COMMITTEE
---	--

STRATEGIC WORK PLAN 1-PAGER



OVERARCHING GOALS

Looking to the future and staying current

1. In late 2023 or early 2024, the ADFM Membership Committee will explore if and how to make membership in ADFM more inclusive, recognizing the changing landscape and organizational structures of academic medicine.
 - a. Recommendations will be brought to the ADFM Board for consideration and action.
2. In 2024, host a discussion of the family medicine CFAS representatives and other key audiences about how to better engage with medical school and health system leadership to promote academic family medicine.
3. By Feb 2025, identify or generate a "one pager" that makes the business case for investing in family medicine within an academic health system (including downstream revenue, etc.).
4. At the 2024 ADFM conference, make space on the agenda for innovative/disruptive "think tank"-type discussions.

Communication

5. By late 2023, work with CAFM on a collective statement addressing supreme court decision on affirmative action, or, if CAFM does not pursue this, a re-affirmation of our anti-racism statement and values in the context of the supreme court decision on affirmative action.
6. Between late 2023 - 26, design a strategic communication plan to provide timely updates between our members and other organizations and collaborators, in order to ensure equitable communication across the organization and to our broader constituents.
7. As part of this communication plan, include an outreach strategy to health systems that have a large academic component to offer membership and resources such as LEADS.



ADVOCACY

1. Between late 2023-26, build a communication strategy within ADFM for strengthening advocacy relationships across CAFM, AFMAC and AAMC.
2. Between late 2023-26, activate ADFM member departments for advocacy through providing at least one training as well as resources and opportunities to partner on issues of interest.



DIVERSITY, EQUITY, & INCLUSION

1. Between 2023-26, generate at least one publication on issues of DEI in departments of family medicine.
1. In 2024, continue to find ways to build up, support and sustain the DEI directors group with quarterly meetings or other services as advised.
2. Between 2023-26, continue to partner with other key players within ADFM and beyond to widen the DEI space.



EDUCATION TRANSFORMATION

1. In 2024, this committee will provide 1-3 offerings related to how Departments of Family Medicine can support faculty development in order to address the leadership pathway issue for core faculty within ADFM and across the discipline.
2. Between 2023-26, deliver content in the form of, at a minimum, one webinar, one hot topic discussion and one publication addressing education transformation and identifying systemic impact on underrepresented populations that those transformational efforts may have.



HEALTHCARE DELIVERY TRANSFORMATION

1. Between 2023-2026, deliver content in the form of a webinar, hot topic discussion or publication 2-3 times a year that highlights timely healthcare delivery related topics with diversity, equity and inclusion themes interwoven into the content and panelists/author selection process.
2. In 2024, identify clinical section leaders across institutions and explore creating opportunities to foster collaboration and knowledge sharing among that group.



LEADER DEVELOPMENT

1. Between 2023-26, develop a means of supporting growth and development department chairs and other senior leaders in order to adequately prepare them to positively impact the disparities and inequities in the healthcare system in their current and future roles.
2. Between 2023-2026, provide 2-5 opportunities per year for leadership development at gatherings of academic family medicine (e.g. conferences), with the intention of including 1-2 presenters from a diverse backgrounds and a focus on opportunities for underrepresented minorities in medicine.
3. Between 2023-2026, update and/or develop resources for leadership development based on member needs with input from members from diverse backgrounds so they can help shape the resources.
4. In 2024, continue to support the LEADS Fellowship ABFM Foundation-funded expansion.




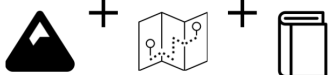




RESEARCH DEVELOPMENT

1. In 2024, offer regular opportunities for research leaders (research directors, vice chairs and chairs) to connect over topics of shared interest (ex: increasing trust in the shared enterprise, increasing community interest).
2. In 2024, on a quarterly basis, curate funding opportunities for ADFM members and disseminate through the Quarterly ADFM Newsletter or listserv
3. In 2024-2026, begin work on National Family Medicine Strategic Plan for Research that ADFM is best poised to lead, including:
 - a. A5: Promote a “culture of curiosity” among medical students and family medicine residency programs to ensure the workforce is well-equipped to critically analyze and apply evidence
 - b. B4: Advocate for increased funding for Departments of Family Medicine from institutional leadership
 - c. B5: Identify and promote promising practices for chairs to support and fund research participation within their departments and institutions
 - d. C4: Leverage Clinical and Translational Science Awards (CTSA) networks and create Centers of Excellence to increase family medicine research within institutions
 - e. Collaboration on other objectives with other organizations as needed
4. In 2024-2026, continue to support the BRC initiative in collaboration with NAPCRG.

STRATEGIC COMMITTEE HIGHLIGHTS

Nov 2022 - Nov 2023

CONTENT FOR OUR MEMBERS	PUBLICATIONS	CONF. SUBMISSIONS BEYOND ADFM
 <ul style="list-style-type: none"> • 5 Sessions at ADFM Annual Conf. • 4 ADFM Hot Topic discussions with 2 more scheduled this year! • 3 DEI Directors and Chairs meetings with 1 more this year! • 3 Research Directors and Chairs meetings with 1 more this year! 	 <ul style="list-style-type: none"> • 4 published Annals Commentaries • 1 manuscript submitted to <i>Family Medicine</i> related to DEI • 1 publication in <i>BMJ Family Medicine and Community Health</i> related to negotiating a new chairs package 	 <p>2023:</p> <ul style="list-style-type: none"> • 1 session at RLS • 1 session at STFM MSE • 1 session and LEADS promotion at STFM Annual Conf. <p>2024:</p> <ul style="list-style-type: none"> • 1 accepted proposal for STFM MSE. Conf. • 4 submissions for STFM Annual Conf. • 1 submission for RLS • 1 submission for AAFP National Conference
SUMMIT	LEADS FELLOWSHIP	UPDATES
 <ul style="list-style-type: none"> • 1 Research Summit • 1 Research strategic plan for the discipline • 1 special issue of JABFM 	 <ul style="list-style-type: none"> • 4 in-person workshops • 15 outgoing fellows • 16 incoming fellows • 2 faculty advisors • 2 alumni receptions • 2 alumni surveys 	 <ul style="list-style-type: none"> • Introduced the Vice Chair Role • Welcome to our 2 new chairs! • Thank you to our 3 outgoing chairs for your years of service!