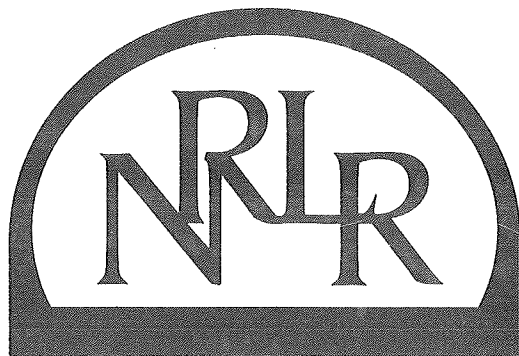


NRLR *THINK TANK* I

**September 27-29, 1991
Santa Cruz, California**

David Brooks



National Rehabilitation Leadership Resource

PREFACE

The California *Think Tank* was a continuation of efforts by more than 60 professionals, to date, involved in an initiative that has been labeled the National Rehabilitation Leadership Resource (NRLR). The National Rehabilitation Leadership Resource is a name given by participants in a *Think Tank* held in Whitefish, Montana, during September 21-23, 1998, for unifying the efforts among those interested in developing leaders for the rehabilitation profession. Previous participants in the initiative adopted a vision for "creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base." The principal intent is to implement a coordinated effort among educators, employers and professional groups which results in a common frame of reference, enables collaboration which minimizes duplication, and permits a learner orientation. Ideally, learners interested in acquiring skills as a rehabilitation leader would be able to obtain such skills in a personal development plan from a variety of programs and using a variety of learning methods.

The Montana *Think Tank* was then followed by a Wyoming *Think Tank* held in Jackson, Wyoming, during April 12-14, 1999. Discussion and plans for that *Think Tank* related to: (a) an NRLR web site; (b) a concept paper on allowing succession by seasoned leaders; (c) leadership competencies; (d) mentoring; (e) leaders as resources; (f) diversity; (g) a fast track for implementation; (h) an NRLR project plan, and (I) a *JRA* Special Issue on "Rehabilitation Leadership Online."

Participants in the California *Think Tank*, held in Santa Cruz during September 27-29, 1999, are grateful to our host for this gathering, the "Collaborative Research and Development Institute" of Hope Rehabilitation Services of Santa Clara and San Jose State University. The hospitality was outstanding, the lodging, meal and meeting arrangements were exquisite, and the generosity of our host in underwriting the local cost portion of travel by participants exceeded anyone's expectation.

James A. Bitter
Chairperson
California *Think Tank*
National Rehabilitation Leadership Resource
September 1999

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NRLR *Think Tank* Report

Santa Cruz, California

September 27-29, 1999

NRLR Vision and Goal and Think Tank Objective

Vision: On the basis of discussion that suggested a broader perspective for the vision of the NRLR, the vision statement developed in 1997 was revised to:

“creation and adoption of a unified system of rehabilitation and disability leadership development for diverse communities through a common set of skills that has high ethics, standards and a competency base which results in the enhancement of the quality of life for people with disabilities.”

Goal: Implementation of a unified system/national plan for the development of rehabilitation leaders.

Think Tank Objective: Refinement of the National Rehabilitation Leadership Resource Plan for the development of rehabilitation leaders and identification of desired outcomes by September 2000.

Think Tank Outcomes

Think Tank discussion related to the draft of the NRLR Plan dated September 1, 1999. Discussion outcomes and suggestions relating to specific strategies for the plan are below. Only those objectives and strategies for which there were action steps identified at the meeting appear here. The complete plan is in the appendix. Volunteers for follow-through are in parentheses.

Goal 1: To make available to leadership learners a national network of rehabilitation resources targeted for the development of the profession's future leaders.

Objective 1.1. To recruit educational resources, including training programs, employers and professional groups, as partners in a network of learning options.

Strategy 1.1.1. Publication of a series of articles about the NRLR initiative in the Enterprising Initiatives column of the *Journal of Rehabilitation Administration*, Column Editor, Margaret Dempsey.

- ➡ Submit the “NRLR Web Site” paper for the *JRA* Enterprising Initiatives column for the Volume 23, Number 1 issue. (Jim Bitter; completed)
- ➡ Submit the “Leadership Competencies” paper for the *JRA* Enterprising Initiatives column for the Volume 22, Number 4 issue (Deborah Atkinson; completed)

Footnote: Contributors to this written report of California Think Tank discussions were Norm Grunewald, Pete Griswold, Laurie Ford, Margaret Dempsey, and Jim Bitter

- ➊ Consider the concept of “Letting Go” to be a continuously evolving concept and the paper for the *JRA* Enterprising Initiatives column as a stimulus for continuing dialogue, rather than viewing the article as a finished product. The reference terminology for the paper by Pete Griswold and Deon Locklin would be changed from “letting go” to “succession;” an added focus might be the development of leaders for some “purpose” which includes impacting the “environment” for promoting leadership, and looking beyond the organization; consider emphasizing the creation of an environment to help leaders emerge rather than viewing a future leader as an apprentice; perhaps raise issues and questions in the paper; have something for the Column Editor, Margaret Dempsey, within the next few months in order to keep some momentum on this subject (Peter Griswold, Deon Locklin, Bob Daniels)
- ➋ Submit a revised “Mentoring Strategies” paper to the *JRA* Enterprising Initiatives Column Editor in October for publication in Volume 23, Number 2 (Margaret Glenn, John Christensen; completed)
- ➌ Postpone submission of the “Leaders as Resources” paper to the *JRA* Enterprising Initiatives column due to a need for some conceptual development (Peter Griswold, Jim Bitter, Jim Dixon)
- ➍ Create an NRLR position statement on diversity as a basis for development of a “Diversity” paper for the *JRA* Enterprising Initiatives column; Dan Hopkins in Denver was mentioned as a potential resource; for the next year a specific focus might be placed on contacting and involving Centers for Independent Living and the Council of Administrators for Native American Rehabilitation; the Independent Living Research Utilization project at Baylor University has completed a study about community outreach. A Task Group consisting of Gary Hudson, Doug St. Clair, Jeanne Miller, Laurie Ford and Mike Collins will attempt to write an article that discusses issues, barriers and opportunities for the *JRA* Enterprising Initiatives column by October 31, 1999. The article could be used to convey a sincere NRLR intent and be a dissemination tool. In addition, individuals volunteered to be liaisons with the following:
 - Independent Living Research Utilization project, Baylor University – Jim Bitter
 - Native Americans and NA Conference – Laurie Ford
 - Recruitment Center, National Clearinghouse for Rehabilitation Training Materials – Dave Brooks
 - State Independent Living Councils – Mike Collins
 - Rehabilitation Research and Training Center, Howard University – Margaret Glenn
 - US Department of Education (for results of previous diversity projects) – Gary Hudson(Gary Hudson, Doug St. Clair, Jeanne Miller, Laurie Ford, Mike Collins)
- ➎ Fast-track the “idea” of advancing a national leadership development system and diversity. Postpone the “Fast Track for Implementation” paper for the *JRA* Enterprising Initiatives column; however, it was suggested that actions might be taken in this area without waiting for concepts to evolve for a paper. Bob Daniels and Laurie Ford indicated that

their group identified two different objectives for fast tracking: (a) implementing parts of a leadership development system before the system is completely developed; (b) fast-tracking people with disabilities for leadership skill development. Ideas advanced included training diverse groups together, seeking help from diverse groups for the development of the system, creating examples for a fast-track, taking people where they are and moving ahead for their development before trying to define where we want them to be, and networking for involvement, e.g. RRCEPs. (Bob Daniels, Laurie Ford)

Strategy 1.1.2. Although any leadership resource serious about contributing to the effort would be welcome, personal invitations to those known to be able to contribute to NRLR activities, e.g., NRLR web site functions, *Think Tanks*, symposiums, forums, chatrooms, conceptual papers.

- Develop an NRLR strategy for networking resources related to rehabilitation leadership; some components might include:

- Training

- Diversity – ILRU, CANAR

- Seasoned consultants – NRLR's Corps of Rehabilitation Leaders

- Resources, materials, consultants – NCHRTM

- Education – pre-service programs, continuing education programs, NISH

- Research – R&T Centers

- Communication

- NRLR web site

- Conferences – NRA, NCRE, CSAVR

- Marketing – NRLR, CARF

- Evaluation

As an illustration for his conceptualization, Pete Griswold shared the story of the 'bridge' (low bridge, high bridge) which appears on NRLR documents. Pete describes it this way:

"On this side of the river with a low bridge (status quo) there is limited access, untapped talent, status quo leadership in an obviously changing environment, unplanned leadership succession, lack of opportunity, little legacy. The river constitutes a barrier to excellence, a resistance to change, makes for a difficult voyage for those who do successfully cross over, and allows only a lucky or serendipitous passage for some individuals. A high bridge to the other side is only possible through equal opportunity, is open to diversity, promotes independent living and the integration of projects with industry into the community and a quality of life, and allows a proliferation of many leaders with opportunities for succession. The bridge itself has a foundation with the philosophy of vocational rehabilitation and independent living. Its pillars, reaching for the sky, are the promise of opportunity. The strands and cable supports the span through the development of competencies, skills, and an understanding of stewardship through training and consultation, and communication through conferences and electronic methods; thus, creating a high bridge highway with open access for many."

- ➡ Continue with an Invitations Committee for recruiting *Think Tank* participants; Deborah Atkinson as Chair will recruit committee members; consider increasing participation from those with disabilities, from state rehabilitation agencies, and from business (Deborah Atkinson)
- ➡ Provide a liaison with the CRP-RCEPs (Laurie Ford)
- ➡ Provide a liaison with the General RRCEPs (Jeanne Miller)
- ➡ Identify what the General Regional Rehabilitation Continuing Education Programs (RRCEP) and the Community Rehabilitation Program-Regional Continuing Education Programs (CRP-RCEP) are doing in the leadership development area for their potential involvement in the NRLR initiative.
- ➡ Write a concept paper on how various organizations, e.g., universities, community rehabilitation programs, independent living centers can participate in NRLR (Laurie Ford)
- ➡ Create a list of all participants involved in the NRLR initiative (Jim Bitter)

Strategy 1.1.3. Conference presentations about the NRLR and its activities by project partners and participants.

- ➡ Create “talking points” about NRLR for use by anyone willing to make an NRLR presentation (Jim Bitter)
- ➡ Create an NRLR Fact Sheet that can be distributed at meetings, conferences, symposia and agency meetings, and for use in promoting the initiative (Jim Bitter)
- ➡ Propose an NRLR presentation to the Association for Persons in Supported Employment (APSE) Conference scheduled for July 2000 (John Christensen)
- ➡ Seek an invitation to address the State Independent Living Council Conference in San Diego during January 3-6, 2000 and/or distribute NRLR materials (Mike Collins)
- ➡ Explore the possibility of *an* NRLR presentation at the ARCA Conference scheduled for March 21-25, 2000 and/or the 2001 conference. (Margaret Glenn)
- ➡ Include an NRLR presentation for the third annual Region VI Forum. (Jeanne Miller)
- ➡ Seek a session about NRLR on the NISH Conference program scheduled for April 16-19, 2000 in Washington, D.C. Volunteers for a panel are Jim Bitter, Mike Carney, Bob Daniels, Margaret Glenn (Deborah Atkinson)
- ➡ Consider approaching the University of Oklahoma about an NRLR presentation as part of their orientation to CSAVR (Pete Griswold)

- ➡ Inform the RSA Commissioner about the NRLR (Pete Griswold)
- ➡ Inform Judith Heumann, Assistant Secretary, Office of Special Education and Rehabilitative Services, about the NRLR (Mike Collins)
- ➡ Seek an opportunity to speak at a session of the President's Committee for People with Disabilities (Margaret Glenn)
- ➡ Distribute information about NRLR at the Region X Education Forum (Laurie Ford)
- ➡ Distribute information about NRLR at the Association for the Education of Community Rehabilitation Programs (AECRP) meeting in San Antonio during November 10-12, 1999 (Laurie Ford)
- ➡ Distribute information about NRLR at the Region X CRP-RCEP Advisory Committee meeting during November 15-16, 1999 (Laurie Ford)

Strategy 1.1.4. Nominations to CSAVR and RSA for conduct of an "Institute on Rehabilitation Issues" that specifically addresses rehabilitation leadership.

- ➡ Nominate rehabilitation leadership as a topic for next year when they convene in May 2000 (Jeanne Miller)

Strategy 1.1.5. Nominations to NRA for conduct of a Mary E. Switzer Memorial Seminar on the topic of rehabilitation leadership.

- ➡ Nominate rehabilitation leadership as a Switzer Seminar topic for the year 2000 (Pete Griswold)

Objective 1.2. To coordinate learning activities among partners, to promote niches in areas of partner strength, and to collaborate in the development and delivery of learning activities where possible.

Strategy 1.2.1. Identification of and definitions for a core of leadership attributes and competencies which can serve as a basis for identification of personal learner needs, identification of learning activities from multiple resources, and the development of personal leadership development plans for learners.

- ➡ Adopt the following 10 "Leading from Within" competencies:

1. Translates vision, mission and strategy into action

Defined as: Understands and actively supports the vision and mission and incorporates them into daily practices, otherwise, walks the talk; Achieves "co-missioning" or instilling the mission and purpose into team practice, as well as instills a sense of ownership and responsibility for fulfilling strategies in others; Is driven for results,

always searching for “what might be” through creative, innovative and entrepreneurial approaches while always questioning/challenging the “what is”; Has the capability to interpret the vision/mission and develop action oriented strategies and plans that result in the achievement of the vision/mission.

Anchors:

- Actively supports vision and mission (Covey)
- Driven for results (Leadership Architect)
- Manages innovation (Leadership Architect)
- Fosters creativity (Covey)
- Incorporates mission, vision and values into daily practice (Easter Seal)
- Takes risks and is entrepreneurial
- Achieves co-missioning (Covey)

2. *Aligns systems, structures and processes with strategy*

Defined as: Aligns all the parts and systems of the organization so that they facilitate achievement of desired results; Understands systems theory & how parts of a system work together/impact each other; Ensures that critical organizational parts (processes, structure, people, information, decisions, rewards) are designed properly & work in concert with one another without impeding progress/work.

Anchors:

- Alignment of processes, structure, people, information, decisions, rewards (Covey)
- Manages processes (Quinn)
- Manages through systems (Leadership Architect)

3. *Creates an environment that allows and cultivates the achievement of the desired mission, outcome and results*

Defined as: Empowers; Creates the conditions that foster talent, potential and creativity; Identifies and provides resources (human, financial, technical, physical, processes) that promote work accomplishment; Creates trust and builds mutual respect; Maintains accountability, internal controls and integrity while developing a sense of ownership, responsibility and pride in team/work group; Maintains positive relationships with others and maintains high morale in team/workgroup.

Anchors:

- Empowers-creates conditions that foster talent, ability, potential (Covey)
- Identifies and provides resources-human, financial, technical, physical, organizational/systematic processes (Covey)
- Maintains accountability (Covey)
- Develops ownership/sense of responsibility
- Manages workplace negativity

4. *Inspires, influences and persuades others to follow*

Defined as: Inspires and motivates others toward a common purpose, mission or strategy; Enlists others to follow; thus, has a followership; Instills commitment through involvement; Influences/negotiates win-win strategies; Possesses credibility, integrity, competence and passion.

Anchors:

- Has a followership (Covey)
- Negotiates/Influences (Leadership Effectiveness Framework)
- Possesses credibility and passion (Covey)

5. *Leads effectively, strategically and by "best practice"*

Defined as: Practicing strategies that lead to team/work group success; Understands the industry; Has business acumen; Organizes, plans realistically, sets goals, evaluates, makes changes/corrections as needed; Budgets strategically and manages finances; Manages technology, information and communication flow; Develops new programs, initiatives and businesses while assessing risks effectively; Manages resources, time and projects; Resolves conflict, makes decisions and solves problems as needed without abdicating responsibility/authority; Deals effectively with difficult situations/people; Strives to stay current on changing trends as well as changes in industry, business, leadership practices.

Anchors:

- Organizes (Quinn, Mary Stewart Hall)
- Manages technology (Leadership Effectiveness Framework)
- Develops programs and businesses (Quinn, Goodwill)
- Manages time and projects (Leadership Architect)
- Plans realistically, sets goals, evaluates (Goodwill)
- Develops/manages resources (Mary Stewart Hall, Goodwill)
- Budgets strategically and manages finances (Mary Stewart Hall)
- Manages information and communication flow (Mary Stewart Hall)
- Assesses risks (Mary Stewart Hall)
- Resolves/manages conflicts (Leadership Effectiveness Framework)
- Solves problems/makes decisions (Mary Stewart Hall, Leadership Architect)
- Effectively deals with difficult people/situations
- Leads by "best practice" (Atkinson)
- Focuses on "what might be" (Greater Washington Society for Association Executives)
- Challenges the process (Kouzes/Posner)

6. *Builds a competent, diverse, empowered team*

Defined as: Empowers and enables others to act; Provides opportunity and develops subordinates; Builds trust and fosters mutual respect; Builds effective teams while strengthening the performance of individuals; Coaches, counsels, nurtures, mentors, strengthens, and encourages the heart; Adjusts style/approach to situation/person as needed; Provides feedback establishing both accountability and rewards; Listens actively, communicates effectively and shares information; Embraces diversity in people and ideas; Attracts talent and selects personnel who are the “right fit;” Maintains positive relationships with others and maintains high morale in team/workgroup; Works to reproduce/create other leaders within; thus, leaving a “legacy.”

Anchors:

- Empowers (Covey)
- Enable others to act (Kouzes/Posner)
- Coaches/counsels (Covey)
- Varies coaching approach/style to needs/situation (Covey, Hersey, Mary Stewart Hall)
- Delegates (Leadership Architect)
- Builds trust (Covey)
- Fosters mutual respect
- Manages HR and a diverse workforce
- Effectively builds teams (Covey)
- Motivates others (Maxwell, Covey)
- Develops subordinates (Mary Stewart Hall)
- Actively listens (Leadership Architect)
- Provides feedback on performance
- Strengthens others
- Attracts talent/selects personnel who are “right fit”
- Mentors (Covey)
- Communicates effectively and shares information
- Encourage the heart/reward (Kouzes/Posner, Covey)

7. *Maintains customer focus*

Defined as: Ensures vision connects with what customers are passionate to get, continually meeting customer needs and wants; Ensures a culture focused on quality and the customer; Focuses on “what might be” and strives to be a market leader understanding that customers have increasing choices; Works to build customers, focusing on both maintaining and creating customers; Possesses external awareness; Establishes credibility and trust with customers; Seeks to listen and understand customer requirements; Works effectively with board of directors/advisory groups.

Anchors:

- Maintains high quality (Mary Stewart Hall)
- Possesses external awareness (Mary Stewart Hall)

- Ensures a culture focused on quality and the customer (Easter Seal)
- Continually meets customer needs and wants (Easter Seal)
- Focuses on “what might be” (Greater Washington Society for Association Executives)
- Establishes credibility/trust (Mary Stewart Hall, Covey)

8. *Possesses ability to follow as well as lead*

Defined as: Accepts, masters and lives with change; Demonstrates flexibility; Practices core values of organization; Is principled centered and has strong values and ethics; Shows loyalty, is trustworthy and demonstrates followership; Actively supports

vision and mission while always questioning the “what is”; Possesses political savvy and organizational agility.

Anchors:

- Is flexible (Leadership Effectiveness Model)
- Possesses organizational agility (Leadership Architect)
- Masters and lives with change (Quinn, Leadership Architect)
- Demonstrates core values of organization (US Navy)
- Is principle centered/has strong ethics and values (Covey, Mary Stewart Hall)
- Demonstrates followership (Covey)
- Shows loyalty (US Army)
- Actively supports vision/mission
- Possesses political savvy (Leadership Architect)
- Trusts (Covey)

9. *Models the way*

Defined as: Leads by example; Walks the talk; Lives and leads by principles, Is trustworthy and honors commitments; Practices integrity, values and ethics that are in line with personal principles and the organization’s/team’s vision/mission; Demonstrates commitment and passion.

10. *Possesses self knowledge, accepts responsibility and exhibits emotional maturity*

Defined as: Knows oneself and is willing to engage in personal change; Motivates oneself and is self directed; Takes responsibility for personal behaviors and actions; Manages one’s emotions and acts with maturity recognizing others’ emotions as well, handling relationships and making corrections as needed

Qualities of a Leader (attributes that enhance personal leadership effectiveness)

- Has ability to set direction
- Possesses initiative
- Has ability to influence/persuade
- Is charismatic

- Is action oriented
- Possesses good interpersonal/communication skills
- Has ability to work with others
- Possesses commitment
- Possesses passion
- Is trustworthy
- Has credibility
- Possesses organizational abilities
- Is mature
- Has ambition/interest in leading
- Uses good judgement
- Possesses problem solving/decision making skills
- Possesses technical/functional competence
- Inspires a followership."

- ➊ Add the following to the above "Qualities of a Leader"
 - Fosters succession
 - Committed to people with disabilities
 - Knows principles and history of rehabilitation
 - Uses disability etiquette
 - Has political savvy
- ➋ Consider giving the 10 core competencies adopted in April 1999 and the 10 "Leading from Within" competencies identified above a rehabilitation and related professions dimension, e.g., "a commitment to people with disabilities," "demonstrates the principles of rehabilitation," (Deborah Atkinson, Joe Campbell, Bob Daniels, Laurie Ford, Dick Oestreich, Ron Wisecarver)
- ➌ Contact Sheryl McGuire regarding her work with competencies and the assessment instrument for rehabilitation that she has developed (Deborah Atkinson, Joe Campbell, Bob Daniels, Laurie Ford, Dick Oestreich, Ron Wisecarver)
- ➍ Add competencies related to stewardship and succession planning (Deborah Atkinson, Joe Campbell, Bob Daniels, Laurie Ford, Dick Oestreich, Ron Wisecarver)

Strategy 1.2.2. Creation and management of a web site devoted to the NRLR that permits a centralized online location for an organized listing of resources and interaction among partners and learners.

- ➎ Create a generic URL (Uniform Resource Locator) address for the NRLR web site so that potential transfers between institutions does not require a new URL (Margaret Glenn, David Brooks, Jim Bitter)
- ➏ Add the capability for Java Script and Visual Basic to the NRLR web site (Margaret Glenn, David Brooks, Jim Bitter)

- ➡ Consider adding the capacity to conduct secured meetings in the chatroom of the NRLR web site (Margaret Glenn)
- ➡ Consider adding a function to the NRLR web site that automatically deletes an activity once its scheduled date is passed, e.g., a scheduled course (Margaret Glenn)

Strategy 1.2.3. Collaborative development of learner-centered activities among partners.

- ➡ Continue searching for ways to collaborate, e.g. create curricular options for learners to take courses from other training programs, develop courses together, share needs assessments, collaborate administratively, e.g., NISH offering CEUs through VCU, Region VI CRP-RCEPs collaborative sharing of materials related to “Just in Time” with WWU and allowing learners to substitute UNC’s *RehabLeadership* Project distance learning courses for their own, and VCU’s online collaborative activity called “Ask the Mentor;” collaboratively develop new ways to make learning activities learner-centered, i.e., learners empowered by choices for content, method, schedule and resource.

Strategy 1.2.4. Collaborative development of publications and papers related to rehabilitation leadership, e.g. the concept of extending leadership throughout the organization by current leaders.

Objective 1.3. To exploit online technology for communication among partners, between partners and learners, and among partners.

Strategy 1.3.1. Utilization of the NRLR web site for forums, chatrooms, and posting of announcements, papers and publications.

- ➡ Create an electronic newsletter that highlights the California *Think Tank* (Margaret Dempsey)
- ➡ Provide brief biographies of NRLR participants for the NRLR web site (Margaret Glenn)
- ➡ Continue to plan for a Forum on Diversity on the NRLR web site (Gary Hudson, Doug St. Clair, Jeanne Miller, Laurie Ford, Mike Collins)
- ➡ Ensure accessibility of the web site (Margaret Glenn)

Objective 1.4. To develop the capacity among partners for utilizing online technology in offering learning anytime and anywhere.

Strategy 1.4.2. Proposing a *JRA* Special Issue on Rehabilitation Leadership Online.

- ➡ Consider conducting an online symposium related to the forthcoming *JRA* Special Issue (Jim Bitter)

Objective 1.5. To capitalize on the experience of quality seasoned leaders, especially retirees, for providing guidance and mentoring to future leaders.

Strategy 1.5.1. Creation of a Corps of Rehabilitation Leaders (CORL) patterned, in part, after the Small Business Administration's Service Corps of Retired Executives (SCORE) that involves resource partners, involves quality seasoned rehabilitation leaders as mentors who are either volunteers or, if possible, paid by existing educational programs, emulates the rehabilitation process for consumers with disabilities, permits mentors and mentees to find each other through a self-selection matching process, utilizes the NRLR web site as a central place for information and interaction, is self-managing to the extent possible, and includes assistive functions like organizational intervention or service as an interim director.

- ⊖ Organize learning content, e.g., competencies, identification of content and resources related to competencies, prior to structuring a CORL program involving delivery mechanisms like mentoring, consultation, placing learners for brief periods in "best practices" sites, the NRLR web site, and seasoned leaders. (Pete Griswold, Jim Bitter, Jim Dixon).

Objective 1.6. To involve people with disabilities in acquiring leadership skills with which to lead the profession.

Strategy 1.6.1. Recruit the involvement of professional groups, consortiums, educational resources and employers composed of people with disabilities as partners in the development of the NRLR project.

- ⊖ Utilize the NRLR web site to conduct chatroom discussions related to ways to reach and involve a diversity of individuals; conduct a forum on the topic after planning using the chatroom function; contact organizations and individuals for guidance based on their experience; identify potential leaders for involvement (Gary Hudson, Doug St. Clair, Jeanne Miller, Laurie Ford, Mike Collins)

Strategy 1.6.2. Recruit learners with disabilities for participation in leadership development activities.

- ⊖ Invite awardees of the "Paul G. Hearne Leadership Awards for People with Disabilities" to NRLR activities.
- ⊖ Continue with the plan to conduct a forum on diversity on the NRLR web site (Gary Hudson, Doug St. Clair, Jeanne Miller, Laurie Ford, Mike Collins).
- ⊖ Consider registering the NRLR web site on www.ONElist.com
- ⊖ Consider permitting participation in NRLR activities by rehabilitation-related professions.
- ⊖ Share information about NRLR with RSA.

Goal 2: To *identify, promote and* offer a competency-based range of quality leadership learning activities which enable learners to create a personal leadership development plan based on competencies and choice in learning modalities and methods.

Objective 2.1 To offer a range of leadership learning activities, including academic and professional development options, which address identified competencies.

Strategy 2.1.1. Recruitment of project partners from among educational resources, employers and professional groups for participation in the NRLR initiative.

- ➡ Encourage current and potential initiative partners to offer mini-seminars and forums related to the adopted competencies; use as one approach for promoting diverse audiences.
- ➡ Utilize the NRAA presentation as “boilerplate” for other presentation opportunities by anyone willing to be a spokesperson for the NRLR (Fred Menz, Margaret Glenn, Deborah Atkinson, Jim Bitter).
- ➡ Conceptualize a leadership program at the University of Wisconsin-Stout (Fred Menz)
- ➡ Conceptualize an interdisciplinary human service program at San Jose State University (Susan Meyers).
- ➡ Conduct joint leadership training among Virginia Commonwealth University, George Washington University and the West Virginia State rehabilitation agency (Margaret Glenn)

Strategy 2.1.2. Enhancement and/or development of learner-centered delivery options including online learning activities by project partners.

- ➡ Consider promoting regional forums and bring results to the *Think Tanks*; sponsor a leadership institute or event (Laurie Ford, Fred Menz)

Objective 2.3. To ~~permit~~ *facilitate* personal leadership development planning and programs for learners by creating learning activities that address all of the identified leadership competencies, and provide competency measures for identifying learning needs and achievement.

Strategy 2.3.3. Identify potential leaders.

- ➡ Develop a plan for identifying and developing leaders for the future, perhaps building on the “Leading from Within” competencies; encourage leadership at a young age; emulate the intern concept; explore private sector funding for the effort.

Identification of Desired Outcomes by September, 2000

Norm Grunewald, as *Think Tank* facilitator, asked participants to identify what accomplishments and outcomes they would like to occur by September 2000. Participants individually wrote their expectations. These activities were then combined into the following categories: (a) Collaborations/ Partnerships; (b) Competencies; (c) Diversity; (d) Funding; (e) Marketing; (f) Web Site, and (g) Miscellaneous, then recorded on newsprint and hung on the wall of the meeting room. After a review of the categories and activities, participants were asked to volunteer for follow-through on the activities during the year by writing their name next to those activities of interest to them. The reader will note some repetition between these desired outcomes for the next 12 months and the major outcomes of the meeting identified above.

Collaborations/Partnerships

- ☉ Involve the Office of Special Education and Rehabilitation Services (OSERS)/ Rehabilitation Services Administration (RSA)/Council of State Administrators of Vocational Rehabilitation (CSAVR)

Achieve support/commitment of OSERS to the concept of leadership development throughout the field of rehabilitation and independent living (Mike Collins, Pete Griswold)

Develop/implement a strategy for approaching OSERS/RSA/CSAVR regarding the vision, mission, goals, and competencies of NRLR (Fred Menz, Jeanne Miller)

Make presentations to OSERS/RSA/CSAVR (Deborah Atkinson, Fred Menz)

- ☉ Introduce NRLR to:

President's Committee on People with Disabilities (Margaret Glenn)
NCRE (Margaret Glenn)
CORE
President's Task Force (Mike Collins, Fred Menz)

- ☉ Create linkages with:

rehabilitation community (Deborah Atkinson; Jeanne Miller)
education community (Susan Meyers)
independent living community
stand alone, disability organizations (Mike Collins)

- ☉ Write a concept paper on how various entities (universities, independent living centers, community rehabilitation programs) can participate in NRLR (Laurie Ford)
- ☉ Participate in NRAA training and ARCA 2001 (Margaret Glenn)

- ➡ Introduce Virginia Commonwealth University rehabilitation leadership doctoral students to NRLR (Margaret Glenn)
- ➡ Encourage each RCEP to sponsor a leadership institute or event (Laurie Ford, Fred Menz)
- ➡ Write at least one example of collaborative efforts (Jeanne Miller)

Competencies

- ➡ Clarify the competencies for leadership; include an “outcomes” orientation, ultimate customer focus, measurability for each, and specific examples of applicability to rehabilitation services (Deborah Atkinson, David Brooks, Mike Carney, Laurie Ford, Richard Oestreich)
- ➡ Revise competencies to relate to rehabilitation values, history, etc. (Deborah Atkinson, Joe Campbell, Richard Oestreich)
- ➡ Distribute the revised list of competencies to groups, trainers, educators (Fred Menz)
- ➡ Create a curriculum or human resources development model that would embrace the ten competencies (Deborah Atkinson, Fred Menz)
- ➡ Request acknowledgment and support for the competencies (Deborah Atkinson)

Diversity

- ➡ Expand the participation in NRLR and include a wider diversity of participants, including:
 - Native Americans (David Brooks, Laurie Ford)
 - Independent living groups (Mike Collins)
 - Service recipients (Deborah Atkinson)
 - People with disabilities (Mike Collins)
 - African Americans and Hispanics
 - Related human service professionals
- ➡ Seek input, guidance and participation of the above diverse groups in NRLR activities and planning
- ➡ Conduct chat room discussions on the proposed diversity paper and on the issues (John Christensen)

Funding

- ➡ Develop a plan for funding the NRLR in the future (Mike Carney, Fred Menz)
- ➡ Develop a strategy for getting political backing from the federal government (Bob Daniels, Pete Griswold, Fred Menz)

- ➡ Develop a program model solid enough to pursue independent funding
- ➡ Create membership in NRLR, similar to AARP (Mike Carney, Pete Griswold)

Marketing

- ➡ Delineate who NRLR believes are the target markets for NRLR Goal 1 related to a national network
- ➡ Develop both a political presence and a political agenda that supports the need for leadership development and succession upon which a marketing strategy can be based (Don Galvin, Pete Griswold)
- ➡ Share needs assessment information among NRLR participants (Deborah Atkinson, Jeanne Miller)
- ➡ Market NRLR activities to his/her constituents (Deborah Atkinson, Jeanne Miller)
- ➡ Develop a marketing plan with goals for recruitment and development of leaders (Deborah Atkinson, Jeanne Miller)
- ➡ Create an NRLR banner for presentations (Mike Carney, Gary Hudson)
- ➡ Create “talking points” for presenters (Deborah Atkinson)

NRLR Web Site

- ➡ Refine the NRLR web site making it even more active, versatile, operational, and utilized (David Brooks, Margaret Glenn)
- ➡ Post leadership competencies on the web site (Deborah Atkinson, Bob Daniels, Margaret Glenn)
- ➡ Continue the development of online resources (Joe Campbell, Margaret Glenn, Jeanne Miller)
- ➡ Formalize one or two NRLR Think Tank meetings online (Bob Daniels, Margaret Glenn)
- ➡ Invite others to visit the web site (Laurie Ford, Jeanne Miller)

Miscellaneous

- ➡ Write a paper on legacy and leadership succession (Bob Daniels, Pete Griswold, Deon Locklin)

- ➡ Schedule the NRLR *Think Tank* meetings between now and September 2000 (Deborah Atkinson, Fred Menz)
- ➡ Make biographies of participants available for collaborative grants, presentations, etc. (Margaret Glenn)
- ➡ Develop compendia of courses and experiences that would allow identifying new leadership (David Brooks, Jeanne Miller)
- ➡ Encourage RCEPs to include labor and education into their training (Fred Menz, Jeanne Miller)

Future NRLR *Think Tanks*

Fred Menz volunteered Wisconsin as the site for a spring 2000 NRLR *Think Tank* to be hosted by the University of Wisconsin-Stout. Bob Daniels accepted the responsibility to serve as Chairperson, and Jim Bitter as Co-Chairperson, for the Wisconsin *Think Tank*. Deborah Atkinson offered Williamsburg, Virginia, as the site for a fall 2000 *Think Tank* hosted by NISH.

Acknowledgment to Hope Rehabilitation Services and San Jose State University

Participants in the California *Think Tank* expressed their sincere appreciation to the “Collaborative Research and Development Institute” of Hope Rehabilitation Services and San Jose State University for serving as host for this *Think Tank*. The facilities, arrangements and hospitality were outstanding. Special thanks go to John Christensen for his leadership in serving as host, and to Joe Campbell, CEO of Hope Rehabilitation Services, and Susan Meyers, Associate Dean of the College of Education at San Jose State University, for generously underwriting the costs for participant lodging and meals, a reception and the meeting room.

Appendix A

National Rehabilitation Leadership Resource
Think Tank Agenda
Santa Cruz, California
September 27-29, 1999

NATIONAL REHABILITATION LEADERSHIP RESOURCE

THINK TANK AGENDA

Santa Cruz, California
September 27-29, 1999

Host, Collaborative Research and Development Institute
a partnership between Hope Rehabilitation Services and San Jose State University

Meeting Site: Chaminade at Santa Cruz
One Chaminade Lane
P.O. Box 2788
Santa Cruz, CA 95063-2788
831-475-5600
800-283-6569
831-476-4798 FAX
kimcraw@chaminade.com
www.chaminade.com

Think Tank Chair: James A. Bitter
RehabLeadership Project
University of Northern Colorado
Greeley, CO 80639
970-351-2506
800-862-2622
970-351-2500 FAX
jabitte@unco.edu
www.mcb.unco.edu/rehab

The Vision - "creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base."

The Goal - Implementation of a unified system/national plan for the development of rehabilitation leaders.

Think Tank Objective - Refinement of the National Rehabilitation Leadership Resource Plan for the development of rehabilitation leaders and identification of desired outcomes by September 2000.

Monday, September 27

1:30-5:00 *Meeting Room – Seascape Room*

Identification of desired NRLR direction and accomplishments by September 2000 and outcomes for this *Think Tank* (to be revisited on Tuesday and Wednesday) – *Norm Grunewald, Facilitator*

Discussion related to Goal 1 of the NRLR Plan including revisions and proposed new activities – *Norm Grunewald, Facilitator, task groups, and individual participants*

Goal 1: To make available to leadership learners a national network of rehabilitation resources targeted for the development of the profession's future leaders.

Objective 1.1 Recruit resources for an NRLR network

Strategy 1.1.1. *JRA* Enterprising Initiatives column series – *Dempsey*

Strategy 1.1.2. Recruit NRLR players – *Invitations Committee (Atkinson, Christensen, Locklin, Mathews) and individually responsible participants (Atkinson, Christensen, Daniels, Griswold, Grunewald)*

Strategy 1.1.3. Conference presentations - *Individual participants (Atkinson, Glenn, Menz)*

Strategy 1.1.4. Institute on Rehabilitation Issues – *Griswold*

Strategy 1.1.5. Switzer Seminar – *Griswold*

Objective 1.2 Coordinate/collaborate on learning activities

Strategy 1.2.1. Leadership attributes and competencies - *Task Group on Leadership Attributes and Competencies (Atkinson, Daniels)*

Strategy 1.2.2. NRLR web site – *Task Group on NRLR Web Site (Bitter, Christensen, Glenn)*

Strategy 1.2.3. Collaborative development of learner-centered activities (*not yet addressed*)

Strategy 1.2.4. Collaborative development of publications/papers – *Individual participants (Bitter, Dempsey, Glenn, Grunewald, Locklin, Griswold)*

Objective 1.3 Exploit online technology

Strategy 1.3.1. Utilization of the NRLR web site – *Task Group on NRLR Web Site (Bitter, Brooks, Christensen, Glenn)*

Strategy 1.3.2. Online forum on mentoring – *Christensen, Glenn*

Objective 1.4. Develop capacity among partners for utilizing online technology

Strategy 1.4.1. Coaching among partners for online learning activities (*not yet addressed*)

Strategy 1.4.2. *JRA* Special Issue on Rehabilitation Leadership Online – *Bitter*

Objective 1.5 Capitalize on quality seasoned leaders for guidance to future leaders

Strategy 1.5.1. Creation of a Corps of Rehabilitation Leaders – *Task Group on Leaders as Resources (Bitter, Griswold)*

Strategy 1.5.2. Mentoring strategies – *Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn)*

Strategy 1.5.3. Online learning activities for mentors – *Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn)*

Strategy 1.5.4. Online learning activities for mentees - *Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn)*

Strategy 1.5.5. Promote Corps of Rehabilitation Leaders - *Task Group on Leaders as Resources (Bitter, Griswold)*

Objective 1.6. Involve people with disabilities

Strategy 1.6.1 Recruit partners – *Task Group on Diversity (Hudson)*

Strategy 1.6.2. Recruit learners - *Task Group on Diversity (Hudson)*

Objective 1.7 Expedite learners involvement by fast-tracking the NRLR – *Task Group on Fast-Track for Implementation (Daniels)*

Strategy 1.7.1. Identify and prioritize NRLR development strategies for expediting - *Task Group on Fast-Track for Implementation (Daniels)*

Strategy 1.7.2. Initiatives for online learning activities (*not yet addressed*)

5:30-6:45 *Social – Hosted by Hope Rehabilitation Services – Linwood's Lounge*
7:00- *Dinner Buffet – Sunset Dining Room*

Tuesday, September 28

7:00-8:00 *Breakfast Buffet – Sunset Dining Room*
8:00-1:00 *Meeting Room – Seascape Room*

NRLR direction revisited – *Norm Grunewald, Facilitator*

Continuation of discussion related to Goal 1 of the NRLR Plan – Refinement of Objectives, Strategies and Responsibilities – *Norm Grunewald, Facilitator*

Discussion related to Goal 2 of the NRLR Plan – Refinement of Objectives, Strategies and Responsibilities – *Norm Grunewald, Facilitator*

Goal 2: To offer a competency-based range of quality leadership learning activities which enable learners to create a personal leadership development plan based on competencies and choice in learning modalities and methods.

Objective 2.1 Leadership learning activities which address competencies

Strategy 2.1.1. Recruit participation in the NRLR Initiative (*not yet addressed*)

Strategy 2.1.2. Learner-centered delivery options (*not yet addressed*)

Objective 2.2 Learning activities responsive to learner delivery preferences

Strategy 2.2.1. Mix of learning opportunities based on learner preferences (*not yet addressed*)

Strategy 2.2.2. Adjustments in educational delivery modalities/methods based on learner preferences (*not yet addressed*)

Objective 2.3. Create learning activities that address all of the leadership competencies and provide competency measures

Strategy 2.3.1. Coordination among NRLR partners (*not yet addressed*)

Strategy 2.3.2. Adoption/development of competency measures (*not yet addressed*)

1:00-2:00 *Lunch Buffet – Sunset Dining Room*

Meeting continued, if needed

Afternoon *Cliff Walk (optional)*

6:00-7:00 *No Host Social – Linwood's Lounge*

7:00- *Dinner Buffet – Sunset Dining Room*

Wednesday, September 29

7:00-8:00 *Breakfast Buffet – Sunset Dining Room*

8:00-12:00 *Meeting Room – Seascape Room*

Continued discussion related to Goal 2 of the NRLR Plan – Refinement of Objectives, Strategies and Responsibilities – *Norm Grunewald, Facilitator*

Revisit/refine desired NRLR accomplishments by September 2000 – *Norm Grunewald, Facilitator*

Future *Think Tanks* and Chairpersons – *Jim Bitter*

Think Tank summary – *Norm Grunewald and Participants*

12:00-1:00 *Lunch Buffet – Sunset Dining Room*

Appendix B

National Rehabilitation Leadership Resource
Think Tank Participants
Santa Cruz, California
September 27-29, 1999

NRLR *Think Tank*
Participants
Santa Cruz, California
September 27-29, 1999

Deborah E. Atkinson
NISH
2235 Cedar Lane
Vienna, VA 22182-5200
703-207-7594
703-560-8473 FAX
datkinson@nish.org

Michael C. Carney
Executive Director
Knox County ARC
2830 East ARC Avenue
Vincennes, IN 47591
812-886-4312
812-886-4312 FAX
mcarney161@hotmail.com

James A. Bitter, Ed.D.
Project Director
RehabLeadership Project
Kenneth W. Monfort College of Business
University of Northern Colorado
Greeley, CO 80639
970-351-2506
970-351-2500 FAX
jabitte@unco.edu

John M. Christensen
Vice President, Hope Rehabilitation Services
Chief Executive Officer, Skills Center, Inc.
2685 Mattison Lane
Santa Cruz, CA 95062
831-476-6501
831-476-3281 FAX
jmceo@aol.com

David J. Brooks
Director
National Clearinghouse of Rehabilitation
Training Materials
Oklahoma State University
5202 North Richmond Hill Drive
Stillwater, OK 74078-4080
405-624-7650
405-624-0695 FAX
brookdj@okway.okstate.edu

Michael C. Collins
Executive Director
State Independent Living Council of California
1600 K Street, Suite 100
Sacramento, CA 95814
916-445-0142
916-445-5973 FAX
mcollins@calsilc.org

Joseph F. Campbell, Ed.D.
President and CEO
Hope Rehabilitation Services
4351 Lafayette Street
Santa Clara, CA 95054
408-748-2896
408-980-9593
campbelj@ix.netcom.com

Robert P. Daniels
Executive Director
Pioneer Adult Rehabilitation Center
485 PARC Circle
Clearfield, UT 84015
801-774-7478
801-776-6188 FAX
rdaniels@parc.dist.davis.k12.ut.us

Margaret C. Dempsey

Assistant Director
RehabLeadership Project
Kenneth W. Monfort College of Business
University of Northern Colorado
Greeley, CO 80639
970-351-2506
970-351-2500 FAX
mdempsey@unco.edu

Laurie H. Ford

Director
Community Rehabilitation Training
Programs, Center for Continuing Education in
Rehabilitation
Western Washington University
6912 220th Street SW, Suite 105
Mountlake Terrace, WA 98043
425-774-4446
425-774-9303 FAX
lford@wce.wvu.edu

Donald E. Galvin, Ph.D.

President and CEO
CARF
4891 East Grant Road
Tucson, AZ 85712
520-325-1044
520-318-1129 FAX
lnausin@carf.org

Margaret K. Glenn, Ed.D.

Assistant Professor
Department of Rehabilitation Counseling
Virginia Commonwealth University
1112 E. Clay Street
P.O. Box 980330
Richmond, VA 23298-0330
804-828-1132
804-828-1321 FAX
mglenn@hsc.vcu.edu

Peter Griswold

Adjunct Professor, CRP-RCEP
University of Wisconsin-Stout
4653 Danbury Way
Okemos, MI 48864
517-349-0976
pgris@mrs.mjc.state.mi.us

Norman D. Grunewald

Consultant on Rehabilitation Management and
Program Services
2032 N. Clifton Avenue, Apt. 3F
Chicago, IL 60614
773-327-2447
773-327-7156 FAX
NGAP@aol.com

Gary Hudson

Executive Officer Emeritus
Community Entry Services
2441 Peck Avenue
Riverton, WY 82501
307-856-5576, Ext. 226
307-857-6901 FAX
ghudson@ces-usa.com

Fred Menz, Ph.D.

Associate Director
Community-Based Rehabilitation Research and
Training Center
University of Wisconsin-Stout
214 10th Avenue
Menomonie, WI 54751
715-232-2236
715-232-2251 FAX
menz@uwstout.edu

Susan Meyers, Ph.D.

Associate Dean
College of Education
San Jose State University
One Washington Square
San Jose, CA 95192-0071
408-924-3605
408-924-3713 FAX
smeyers@email.sjsu.edu

Jeanne C. Miller

Director
Region VI Rehabilitation
Continuing Education Program
P.O. Box 1358, Bldg. #35
105 Reserve
Hot Springs, AR 71902
501-623-7700
501-624-6250 FAX
jcmiller@cei.net

Richard P. Oestreich, Ph.D.

Rehabilitation Consultant
80 East Fifth Street
Chillicothe, OH 45601
740-774-1268
740-779-0644 FAX
oestreic@bright.net

Ronald Wisecarver

President and CEO
ARC of Peoria
1913 West Townline Road
Peoria, IL 61612
309-691-3800
309-689-3613 FAX
ronwisecarver@yahoo.com

Appendix C

National Rehabilitation Leadership Resource Plan
September 1, 1999

NATIONAL REHABILITATION LEADERSHIP RESOURCE PLAN

Notes:

September 1, 1999

The following draft of a National Rehabilitation Leadership Resource Plan attempts to summarize discussions and activities of colleagues participating in an initiative which began in May 1996 and which is leading toward a unified effort for the development of the rehabilitation profession's future leaders. The plan will always be a work in progress. Hopefully, it can serve as an organizing instrument for activities of the NRLR initiative. JB

The NRLR Initiative

National Rehabilitation Leadership Resource (NRLR) is a name given by participants in a *Think Tank* held in Whitefish, Montana, during September 21-23, 1998, to an initiative to unify efforts among those interested in developing leaders for the rehabilitation profession. The intent of the initiative is to foster shared ownership in collaborative efforts among those interested in cultivating future leaders. Thus, the activities of this common effort belong to various organizations and programs among many, rather than one or a few programs.

The initiative originated with the Rehabilitation Leadership Council, an advisory group of the RehabLeadership Project at the University of Northern Colorado. This group, consisting of core members and a rotation of guests, adopted a vision for "creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base." The principal intent of the initiative is to implement a coordinated effort among educators, employers and professional groups, which results in a common frame of reference, enables collaboration to minimize duplication, and permits a learner orientation. Ideally, learners interested in acquiring skills as a rehabilitation leader would be able to obtain such skills in a personal leadership development plan from a variety of programs and using a variety of learning methods. The planning approach is similar to that taken with consumers of rehabilitation services and it emulates the vocational rehabilitation process.

As part of this effort, participants in those early meetings developed a Special Issue on Rehabilitation Leadership Development for the *Journal of Rehabilitation Administration (JRA)*. The Special Issue, published in November 1997, offers six articles relating to leadership in the information age, competencies, the measurement of competencies, curricular delivery approaches, considerations for a curricular model, and the future of rehabilitation leadership.

The *JRA* Special Issue was followed with a symposium conducted on the Internet, involving 31 rehabilitation leaders from around the country. The foci of the sympo-

sium were the six articles in the Special Issue. Each article was the subject of discussion for one week of a six-week dialogue. Each article was formally addressed with a brief reaction submitted in advance by four participants. These papers were posted to the symposium listserv at the beginning of the appropriate week and discussion among all participants ensued. Authors served as discussion moderators related to their article. The discussion was summarized at the end of each week.

In addition to numerous ideas for conceptualizing the development of rehabilitation leaders, the symposium led to a face-to-face *Think Tank* held in Montana and hosted by the Rehabilitation Leadership Council. For this there were 20 rehabilitation leaders. The Montana *Think Tank* resulted in seven action-oriented ideas for implementing a unified system for the development of rehabilitation leaders.

- Creating a web site devoted to rehabilitation leadership development
- Writing a paper on the concept of “letting go” or yielding to succession by current leaders
- Writing a paper relating to desired attributes and core competencies for rehabilitation leaders
- Implementing a program of mentoring strategies
- Creating a program to utilize seasoned leaders as resources for future leaders
- Actively involving people with disabilities in achieving a unified system
- Developing a “fast-track” for the implementation of the NRLR

Need for the NRLR Initiative

It is generally accepted within the vocational rehabilitation profession that it has not prepared with succession planning for the magnitude of turnover in leadership that it will soon experience as a result of retirement. Accession to leadership in rehabilitation has usually been through opportunity. Too, the development of leaders through education/training has not involved a comprehensive plan. Although various excellent training programs offering leadership content exist, they are not coordinated, they promote different philosophies and approaches, there is little exchange of resources and expertise, some duplication of effort exists, and scant resources are not leveraged in order to promote economies among programs. Many of the leadership development programs that do exist use a course-centered format, i.e., courses of fixed length and generally delivered in fixed face-to-face sessions. Face-to-face courses tend to be costly to learners and their sponsors in terms of travel and lost job productivity while in a travel status. They may also be inconvenient for those with families or those who live in remote areas. However, leadership development programs are increasingly integrating communication technology into their curriculums. With the increasing availability of online technology, particularly the Internet, learning anytime and anywhere becomes possible. Positive intents of this new resource are to enhance the options for learners, increase learner accessibility to those options, and cultivate the use of technology by learners and educators.

Significance of the NRLR Initiative

Notes:

Historically, vocational rehabilitation training, whether for credit or for professional development, has been delivered face to face. Although distance learning as a delivery strategy has recently been encouraged, there has not been much incentive to training programs to exploit its potential. Five distance learning programs were funded by the Rehabilitation Services Administration of the U.S. Department of Education beginning in 1993; funding for distance learning as a category in vocational rehabilitation ends in 1999.

Vocational rehabilitation is a relatively small field. However, Congress invests approximately 40 million dollars annually for rehabilitation training. Professional development activities represent the majority of these appropriated monies. Relative to the rehabilitation leadership need, training in this area is a very small part of such professional development activities. Thus, any coordinated effort in this area will have a major impact. This evolving NRLR Plan involves the demonstration of a national unified system of rehabilitation leadership development among partners and emphasizes the availability of multiple resources and learner choice for access to learning opportunities.

The NRLR initiative's task group on the concept of allowing succession and extending leadership throughout the organization by long time leaders has a nice quote by Rosabeth Moss Kanter in *World Class Leaders* in its evolving paper which suggests the essence of leadership by partners reflected in this initiative:

“[They have] open minds and outreach to partners – they have the vision, skills, and resources to form networks that extend beyond their home base and bring benefits to their own group by partnering with others... They must become integrators who can look beyond obvious differences among organizations, sectors, disciplines, functions, and cultures. They must be diplomats, who can resolve conflicts – [to] influence people to work together to find common cause.”

NRLR Purpose, Goals, Objectives, Strategies, Responsibilities and Progress

The purpose of the National Rehabilitation Leadership Resource initiative is to implement a national system for the development of rehabilitation leaders which is learner centered. Attributes of the proposed system, identified by the 20 rehabilitation leaders in the Fall 1998 *Think Tank*, are the following:

- The system is national and focused on rehabilitation leadership
- It takes a diverse, broad and inclusive position with respect to values, ideas, culture, skills, and learning modalities, which can be accessed by everyone in rehabilitation

- It is proactive and emphasizes relevant and cutting-edge knowledge and activity
- It exploits technology for communication and coordination of the system and for learning
- It provides a “fast-track” for implementation and for those with disabilities
- It utilizes a formal network among resources (e.g., education, employers, professional groups) to allow access by learners
- It seeks partnerships with other industries, particularly business, which also involves rehabilitation organizations, e.g., disability consortiums, RSA
- It actively stimulates world/global class best practices, and
- It is market-driven, e.g., responsive to learner demand

The goals, objectives, strategies, responsibilities and progress to date of the NRLR initiative are:

Goal 1: To make available to leadership learners a national network of rehabilitation resources targeted for the development of the profession’s future leaders.

Objective 1.1. To recruit educational resources, including training programs, employers and professional groups, as partners in a network of learning options.

Strategy 1.1.1. Publication of a series of articles about the NRLR initiative in the Enterprising Initiatives column of the *Journal of Rehabilitation Administration*, Column Editor, Margaret Dempsey.

Responsibility

- ☐ Margaret Dempsey and each NRLR Task Group as follows:
- ☐ NRLR Web Site; Jim Bitter by February 28, 1999, for May issue
- ☐ Leadership Competencies; Deborah Atkinson by April 30, 1999, for August issue
- ☐ Letting Go; Deon Locklin, Pete Griswold, Bob Daniels, Doug St. Clair, Peter Vail by July 31, 1999, for November issue
- ☐ Mentoring Strategies; John Christensen and Margaret Glenn by July 31, 1999, for November issue
- ☐ Leaders as Resources; Pete Griswold, Jim Dixon, Jim Bitter by October 31, 1999, for February issue

Notes:

- ☐ Diversity; Gary Hudson, Doug St. Clair by October 31, 1999, for November issue
- ☐ Fast-Track for Implementation; Jim Stephens, Bob Daniels, Kathy Wilkins by October 31, 1999, for February issue

Progress**Margaret Dempsey -**

“*JRA* Enterprising Initiatives Column - To date, two of the seven proposed NRLR task group articles have been submitted to the *Journal of Rehabilitation Administration* for publication in the Enterprising Initiatives column—‘The National Rehabilitation Leadership Resource’ by Jim Bitter and ‘Rehabilitation Leadership Competencies for the Next Millennium’ by Deborah Atkinson. Published in reverse order, Deborah’s article was run first, appearing recently in Volume 22(4); Jim’s article will follow in the next issue. The mentoring and ‘letting go’ task groups plan to glean suggestions and ideas from the California *Think Tank* participants for concrete, practical applications of these two concepts and hope to incorporate these thoughts into their article drafts. A due date of October 31 has been scheduled for receipt of the articles from the three remaining task groups: Seasoned Leaders as Resources, Diversity and Fast Track.”

Strategy 1.1.2. Although any leadership resource serious about contributing to the effort would be welcome, personal invitations to those known to be able to contribute to NRLR activities, e.g., NRLR web site functions, *Think Tanks*, symposiums, forums, chatrooms, conceptual papers.

Responsibility

- ☐ Invitations Committee for California *Think Tank* (Deborah Atkinson, John Christensen, Deon Locklin, Joe Mathews)
- ☐ Deborah Atkinson – NRLR information to Goodwill Industries International
- ☐ John Christensen – NRLR information to listservs for CARF and for California rehab community
- ☐ Norm Grunewald – Develop marketing strategies for NRLR

- ☐ John Christensen – host for the California *Think Tank*, and perhaps, serve as a 501(c)(3) host for potential funding applications
- ☐ Bob Daniels – NRLR information to NISH Board of Directors
- ☐ Jim Stephens – NRLR information to RRCEPs
- ☐ Pete Griswold – NRLR information to CARF and NCHRTM
- ☐ Joe Mathews – NRLR information to CSAVR Human Resource Development Committee
- ☐ Doug St. Clair and Jim Dixon – NRLR information to CANAR

Progress

Joe Mathews –“I mentioned the NRLR to Peggy Rosser (Georgia VR director), who is this year’s chair for the HRD Committee of CSAVR and encouraged CSAVR representation in NRLR activities.”

Strategy 1.1.3. Conference presentations about the NRLR and its activities by project partners and participants.

Responsibility

- ☐ NISH Board of Directors Training and Human Resources Committee (Deborah Atkinson/Jim Bitter)
- ☐ National Council of Work Centers meeting (Jim Bitter)
- ☐ Margaret Glenn (ARCA Conference session)
Presenters –Atkinson, Glenn, Menz
- ☐ Fred Menz (NRAA Conference session)
Presenters –Atkinson, Glenn, Menz, Sattler (tentative)

Progress

Jim Bitter –

“Brief overviews of the NRLR were given to the Training and Human Resources Committee and the National Council of Work Centers at the NISH Board of Director’s meeting in May 1999.”

*Notes:***Fred Menz –**

“National Rehabilitation Administration Association Panel - There is a panel presentation scheduled for NRAA on the 12th of November at the National Rehabilitation Association Meeting in Minneapolis, which the Continuing Education Center at the University of Wisconsin-Stout is going to help sponsor. Panelists are Deborah Atkinson, Margaret Glenn, Dale Sattler (tentatively), and Fred Menz. Glen Peterson approached me on this. The plan I submitted is as follows (and open to revision):

Establish the need and relevant factors in the current environment for creating leadership development resources across the field of rehabilitation and across the country;

Present discussion of curriculum issues that are being addressed by the NRLR;

Discuss the direction of the NRLR as an entity; and

Present products that have been created by the NRLR including various documents and a web site.

Our learner objectives are:

To acquaint participants with the NRLR as a tool that can be used by supervisors, managers, and administrators for the purpose of assisting in providing effective leadership in the field of rehabilitation; and

To stimulate discussion and network building among participants for the purpose of sharing leadership ideas, techniques, and resources.

I suspect this may be similar to the panel to be provided at ARCA under Margaret Glenn’s leadership. We (the four of us) should spend some time at Santa Cruz giving both life.”

Margaret Glenn –

“I am the Program Chair for the American Rehabilitation Counseling Association division for the American Counseling Association’s conference March 21-25, 2000. The site is Washington, DC. I would like to propose a panel or presentation on rehabilitation leadership issues for the conference as a special topic, keeping focused on needs and recommendations for the field at large—

community, private and public rehabilitation. It would be a wonderful opportunity for the NRLR group to gain national attention as well.”

Strategy 1.1.4. Nominations to CSAVR and RSA for conduct of an “Institute on Rehabilitation Issues” that specifically addresses rehabilitation leadership.

Responsibility

☐ Pete Griswold; Joe Mathews

Progress

Joe Mathews –

“CSAVR will be appointing a committee to process IRI suggestions. On behalf of NRLR, I put rehabilitation leadership on the list for next year’s consideration by that committee. I will follow through as an advocate for rehabilitation leadership at the time topics are considered.”

Strategy 1.1.5. Nominations to NRA for conduct of a Mary E. Switzer Memorial Seminar on the topic of rehabilitation leadership.

Responsibility

☐ Pete Griswold

Progress

Jim Bitter –

“The coordinator for the Switzer Seminars indicated that the subject of rehabilitation leadership was too late for this year’s seminar, but would be considered for next year’s.”

Objective 1.2. To coordinate learning activities among partners, to promote niches in areas of partner strength, and to collaborate in the development and delivery of learning activities where possible.

Strategy 1.2.1. Identification of and definitions for a core of leadership attributes and competencies which can serve as a basis for identification of personal learner needs, identification of learning activities from multiple resources, and the development of personal leadership development plans for learners.

Responsibility

- Task Group on Leadership Attributes and Competencies
(Deborah Atkinson, Bob Daniels, Laurie Ford, Mary Zubek)

Progress

Deborah Atkinson –

“Leading From Within: Competencies for Leaders Not at the Top” (*Leadership requirements for the non-CEO*):

1. *Translates vision, mission and strategy into action*

Defined as: Understands and actively supports the vision and mission and incorporates them into daily practices, otherwise, walks the talk; Achieves “co-missioning” or instilling the mission and purpose into team practice, as well as instills a sense of ownership and responsibility for fulfilling strategies in others; Is driven for results, always searching for “what might be” through creative, innovative and entrepreneurial approaches while always questioning/challenging the “what is;” Has the capability to interpret the vision/mission and develop action oriented strategies and plans that result in the achievement of the vision/mission.

Anchors:

- Actively supports vision and mission (Covey)
- Driven for results (Leadership Architect)
- Manages innovation (Leadership Architect)
- Fosters creativity (Covey)
- Incorporates mission, vision and values into daily practice (Easter Seal)
- Takes risks and is entrepreneurial
- Achieves co-missioning (Covey)

2. *Aligns systems, structures and processes with strategy*

Defined as: Aligns all the parts and systems of the organization so that they facilitate achievement of desired results; Understands systems theory and how parts of a system work together/impact each other; Ensures that critical organizational parts (processes, structure, people, information, decisions, rewards) are designed properly and work in concert with one another without impeding progress/work.

Notes:

Anchors:

- Alignment of processes, structure, people, information, decisions, rewards (Covey)
- Manages processes (Quinn)
- Manages through systems (Leadership Architect)

3. *Creates an environment that allows and cultivates the achievement of the desired mission, outcome and results*

Defined as: Empowers; Creates the conditions that foster talent, potential and creativity; Identifies and provides resources (human, financial, technical, physical, processes) that promote work accomplishment; Creates trust and builds mutual respect; Maintains accountability, internal controls and integrity while developing a sense of ownership, responsibility and pride in team/work group; Maintains positive relationships with others and maintains high morale in team/workgroup.

Anchors:

- Empowers-creates conditions that foster talent, ability, potential (Covey)
- Identifies and provides resources-human, financial, technical, physical, organizational/systematic processes (Covey)
- Maintains accountability (Covey)
- Develops ownership/sense of responsibility
- Manages workplace negativity

4. *Inspires, influences and persuades others to follow*

Defined as: Inspires and motivates others toward a common purpose, mission or strategy; Enlists others to follow; thus, has a followership; Instills commitment through involvement; Influences/negotiates win-win strategies; Possesses credibility, integrity, competence and passion.

Anchors:

- Has a followership (Covey)
- Negotiates/Influences (Leadership Effectiveness Framework)
- Possesses credibility and passion (Covey)

5. *Leads effectively, strategically and by "best practice"*

Defined as: Practicing strategies that lead to team/work group success; Understands the industry; Has business acumen;

Notes:

Organizes, plans realistically, sets goals, evaluates, makes changes/corrections as needed; Budgets strategically and manages finances; Manages technology, information and communication flow; Develops new programs, initiatives and businesses while assessing risks effectively; Manages resources, time and projects; Resolves conflict, makes decisions and solves problems as needed without abdicating responsibility/authority; Deals effectively with difficult situations/people; Strives to stay current on changing trends as well as changes in industry, business, leadership practices.

Anchors:

- Organizes (Quinn, Mary Stewart Hall)
- Manages technology (Leadership Effectiveness Framework)
- Develops programs and businesses (Quinn, Goodwill)
- Manages time and projects (Leadership Architect)
- Plans realistically, sets goals, evaluates (Goodwill)
- Develops/manages resources (Mary Stewart Hall, Goodwill)
- Budgets strategically and manages finances (Mary Stewart Hall)
- Manages information and communication flow (Mary Stewart Hall)
- Assesses risks (Mary Stewart Hall)
- Resolves/manages conflicts (Leadership Effectiveness Framework)
- Solves problems/makes decisions (Mary Stewart Hall, Leadership Architect)
- Effectively deals with difficult people/situations
- Leads by "best practice" (Atkinson)
 - Focuses on "what might be" (Greater Washington Society for Association Executives)
- Challenges the process (Kouzes/Posner)

6. *Builds a competent, diverse, empowered team*

Defined as: Empowers and enables others to act; Provides opportunity and develops subordinates; Builds trust and fosters mutual respect; Builds effective teams while strengthening the performance of individuals; Coaches, counsels, nurtures, mentors, strengthens, and encourages the heart; Adjusts style/approach to situation/person as needed; Provides feedback establishing both accountability and rewards; Listens actively, communicates effectively and shares informa-

tion; Embraces diversity in people and ideas; Attracts talent and selects personnel who are the “right fit;” Maintains positive relationships with others and maintains high morale in team/workgroup; Works to reproduce/create other leaders within; thus, leaving a “legacy.”

Anchors:

- Empowers (Covey)
- Enable others to act (Kouzes/Posner)
- Coaches/counsels (Covey)
- Varies coaching approach/style to needs/situation (Covey, Hersey, Mary Stewart Hall)
- Delegates (Leadership Architect)
- Builds trust (Covey)
- Fosters mutual respect
- Manages HR and a diverse workforce
- Effectively builds teams (Covey)
- Motivates others (Maxwell, Covey)
- Develops subordinates (Mary Stewart Hall)
- Actively listens (Leadership Architect)
- Provides feedback on performance
- Strengthens others
- Attracts talent/selects personnel who are “right fit”
 - Mentors (Covey)
 - Communicates effectively and shares information
 - Encourage the heart/reward (Kouzes/Posner, Covey)

7. Maintains customer focus

Defined as: Ensures vision connects with what customers are passionate to get, continually meeting customer needs and wants; Ensures a culture focused on quality and the customer; Focuses on “what might be” and strives to be a market leader understanding that customers have increasing choices; Works to build customers, focusing on both maintaining and creating customers; Possesses external awareness; Establishes credibility and trust with customers; Seeks to listen and understand customer requirements; Works effectively with board of directors/advisory groups.

Anchors:

- Maintains high quality (Mary Stewart Hall)
- Possesses external awareness (Mary Stewart Hall)
- Ensures a culture focused on quality and the customer (Easter Seal)

Notes:

- Continually meets customer needs and wants (Easter Seal)
- Focuses on “what might be” (Greater Washington Society for Association Executives)
- Establishes credibility/trust (Mary Stewart Hall, Covey)

8. *Possesses ability to follow as well as lead*

Defined as: Accepts, masters and lives with change; Demonstrates flexibility; Practices core values of organization; Is principled centered and has strong values and ethics; Shows loyalty, is trustworthy and demonstrates followership; Actively supports vision and mission while always questioning the “what is;” Possesses political savvy and organizational agility.

Anchors:

- Is flexible (Leadership Effectiveness Model)
- Possesses organizational agility (Leadership Architect)
- Masters and lives with change (Quinn, Leadership Architect)
- Demonstrates core values of organization (US Navy)
- Is principle centered/has strong ethics and values (Covey, Mary Stewart Hall)
- Demonstrates followership (Covey)
- Shows loyalty (US Army)
- Actively supports vision/mission
- Possesses political savvy (Leadership Architect)
- Trusts (Covey)

9. *Models the way*

Defined as: Leads by example; Walks the talk; Lives and leads by principles, Is trustworthy and honors commitments; Practices integrity, values and ethics that are in line with personal principles and the organization’s/team’s vision/mission; Demonstrates commitment and passion.

10. *Possesses self knowledge, accepts responsibility and exhibits emotional maturity*

Defined as: Knows oneself and is willing to engage in personal change; Motivates oneself and is self directed; Takes responsibility for personal behaviors and actions; Manages one’s emotions and acts with maturity recognizing others’ emotions as well, handling relationships and making corrections as needed.

Qualities of a Leader (attributes that enhance personal leadership effectiveness)

- Has ability to set direction
- Possesses initiative
- Has ability to influence/persuade
- Is charismatic
- Is action oriented
- Possesses good interpersonal/communication skills
- Has ability to work with others
- Possesses commitment
- Possesses passion
- Is trustworthy
- Has credibility
- Possesses organizational abilities
- Is mature
- Has ambition/interest in leading
- Uses good judgement
- Possesses problem-solving/decision-making skills
- Possesses technical/functional competence
- Inspires a followership."

Strategy 1.2.2. Creation and management of a web site devoted to the NRLR that permits a centralized online location for an organized listing of resources and interaction among partners and learners.

Responsibility

- ☐ Task Group on NRLR Web Site (Margaret Glenn, Jim Bitter, John Christensen, David Brooks)

Progress

Jim Bitter –

"The NRLR web site will continue to be hosted at VCU; Hope Rehabilitation Services had volunteered when VCU asked for another host to be found. VCU subsequently reconsidered and continuation at VCU is fine with Hope Rehabilitation Services. As a result of discussions surrounding the planned transition to Hope, development of the web site was delayed. The posting of substance to the web site by NRLR partners can begin soon. A forum on mentoring was conducted on the NRLR web site in June facilitated by Margaret Glenn and John Christensen."

David Brooks –

"Web site backup - NCHRTM is willing to be a backup resource for VCU for the NRLR web page. The exact degree that we may

Notes:

be of assistance can depend on the way the page and database were developed. We can also provide some consultation on making the site fully accessible, especially to the blind, which it isn't presently. Since we provide so many web pages involving state agencies and rehab associations, we have learned when it comes to getting some things done in the public rehab program. I hope to be of some help on Objective 1.3, Exploit Online Technology and 1.4, Develop capacity among partners for utilizing technology. I will explore alternatives to the WebBoard forum for the NRLR group."

Strategy 1.2.3. Collaborative development of learner-centered activities among partners.

Responsibility

Not yet addressed

Strategy 1.2.4. Collaborative development of publications and papers related to rehabilitation leadership, e.g., the concept of extending leadership throughout the organization by current leaders.

Responsibility

- ☐ Jim Bitter (*JRA* Special Issue on Rehabilitation Leadership Online)
- ☐ Jim Bitter - NRLR Plan
- ☐ Margaret Dempsey (*JRA* Enterprising Initiatives column)
Authors – Bitter; Atkinson; Christensen/Glenn; Locklin; Griswold; Hudson; Stephens
- ☐ Margaret Dempsey – Newsletter re: California *Think Tank*
- ☐ Jim Dixon and Doug St. Clair – NRLR article for CANAR newsletter
- ☐ Margaret Glenn – Study on mentor-mentee relationships
- ☐ Norman Grunewald – California *Think Tank* Report
- ☐ Deon Locklin, Pete Griswold, Bob Daniels, Peter Vail, Doug St. Clair – Succession ("Letting Go") concept paper
- ☐ Doug St. Clair – Paper on diversity for NRLR web site

Progress**Jim Bitter –**

“The *JRA* Special Issue on Rehabilitation Leadership Online is on schedule for publication in February 2000. Involved are six articles by nine authors and 12 reviewers. The six articles are:

- Online Technology Leadership (Adams)
- Partnering Online (Jones)
- Rehabilitation Leadership Education Online (Glenn, Hawley, Mann)
- Learner Online Interaction (Bitter)
- Organizational Communication Online (Dodson)
- Online Accessibility (Oestreich)

The 12 reviewers (unknown by authors) are: Brooks; Dempsey; Ford; Grunewald; Henninger; Huerta; McMahon; Muzzio; Nichols; Ososkie; Sattler; Zubek.”

Deon Locklin –

“Pete’s and my efforts since April have been spent trying to refine the concept of “letting go.” Our recently submitted *Enterprising Initiatives* article reflects our expanded thinking in this area. To summarize:

1. Dramatic change within the rehabilitation industry, along with other factors, challenges us to think more strategically about leadership development, succession planning, and the need for current leaders to create legacy.
2. To successfully address/implement leadership development, succession planning, and legacy, we must let go of autocratic, controlling paradigms within our culture, and move toward open systems thinking, democratic, fluid practices.
3. To help us ‘move forward,’ NRLR can promote and infuse new thinking about leadership and management in all activities.

Possible action steps that move us from concept to application include:

1. Identify specific concepts and subjects that reflect or serve as a foundation for the ‘new thinking’ (e.g., stewardship, chaos theory, open systems, etc.)

Notes:

2. Review curricula of existing rehabilitation leadership development initiatives to determine the extent to which these concepts are integrated.
3. Develop a proposed curriculum that is based on these concepts, and share with existing programs.
4. Develop a presentation on our overall concept - NCRE, CSAVR, etc.
5. Work with the National Clearinghouse of Rehabilitation Training Materials to promote a special interest category in these subjects."

Fred Menz –

"Future of Rehabilitation Paper - In March I prepared a paper on the future of rehabilitation, suggesting some positive thinking toward where and how "more could be more," rather than "less as more." I presented the paper at the NISH Regional Training Forum with Bill Sandanato and slightly revised it and presented from it at the IN-ARF CEO Leadership Symposium. The March version is available at the RTC's web site, under Indiana presentation: rtc.uwstout.edu. Some of my comments went toward creating the next wave of leadership."

Objective 1.3. To exploit online technology for communication among partners, between partners and learners, and among learners.

Strategy 1.3.1. Utilization of a NRLR web site for forums, chatrooms, and posting of announcements, papers and publications.

Responsibility

- ☐ Task Group on NRLR Web Site (Jim Bitter, John Christensen, Margaret Glenn)
- ☐ Deborah Atkinson – post NISH leadership training
- ☐ Jim Bitter – post RehabLeadership Project training activities and a link to the Project web site
- ☐ Pete Griswold – post leadership training information from Michigan State University and from University of Wisconsin-Stout

- ☐ Ron House – post training information from the Forward to Basics organization
- ☐ Gary Hudson – organize a forum on diversity
- ☐ Deon Locklin – post GSU CRP-RCEP workshops, publications and information about their online discussion forum
- ☐ Peter Vail – post OU-National Leadership Executive Institute leadership activities and provide a link to the OU-NLEI web site
- ☐ Jim Stephens – post GSU-RRCEP leadership activities and a link to the GSU-RRCEP web site

Progress**Jim Bitter –**

“The NRLR web site was going to be transferred from VCU to Hope Rehabilitation Services; thus, has not been developed since the Wyoming *Think Tank*. Between VCU and Hope it was decided to keep it at VCU. Development will resume.”

Strategy 1.3.2. Conduct of a Forum on Mentoring on the NRLR web site for the purpose of planning a National Mentoring Program.

Responsibility

- ☐ Margaret Glenn and John Christensen

Progress**Jim Bitter –**

“A Forum on Mentoring was conducted on the NRLR web site during the month of June, led by Margaret and John. There were about seven participants.”

Objective 1.4. To develop the capacity among partners for utilizing online technology in offering learning anytime and anywhere.

Strategy 1.4.1. Coaching among partners and collaborative development of online learning activities.

Responsibility

Not yet addressed

Notes:

Strategy 1.4.2. Proposing a *JRA* Special Issue on Rehabilitation Leadership Online.

Responsibility

☐ Jim Bitter

Progress**Jim Bitter –**

“The proposal was accepted by *JRA* and development of the Special Issue is progressing. Manuscript outlines were submitted by authors by June 15; manuscript drafts were received from authors by July 31, and peer reviews (one-way blind reviews) were completed with feedback to authors by August 15. The next deadline is for author final manuscripts by September 30.

Through the RehabLeadership Project, I am planning to conduct a symposium, perhaps offered twice, related to the *JRA* Special Issue on Rehabilitation Leadership Online. The intent is to pattern it similar to the symposium related to the earlier *JRA* Special Issue on Rehabilitation Leadership Development. That symposium used a listserv, one article was discussed each week, the six authors were moderators, 24 other leaders wrote 500 word comments in advance for one of the six articles as a way to stimulate thinking and discussion, and discussion was summarized at the end of each week. The symposium planned for the forthcoming *JRA* Special Issue will utilize a Jones Knowledge Group e-education web site but will emulate the previous one in other respects. The first symposium is planned for February-March 2000; the possible second one for June-July 2000.”

Objective 1.5. To capitalize on the experience of quality seasoned leaders, especially retirees, for providing guidance and mentoring to future leaders.

Strategy 1.5.1. Creation of a Corps of Rehabilitation Leaders (CORL) patterned, in part, after the Small Business Administration’s Service Corps of Retired Executives (SCORE) that involves resource partners, involves quality seasoned rehabilitation leaders as mentors who are either volunteers or, if possible, paid by existing educational programs, emulates the rehabilitation process for consumers with disabilities, permits mentors and mentees to find each other through a self-selection matching process, utilizes the NRLR web site as a central place for information and interaction, is self-managing to the extent possible, and includes assistive functions like organizational intervention or service as an interim director.

Responsibility

- ☐ Task Group on Leaders as Resources (Pete Griswold, Jim Bitter, Jim Dixon)

Progress**Pete Griswold –**

“Progress on CORL: No further contact with SCORE until we discuss at the Santa Cruz meeting. I have visited the Clearing-house to inquire about collaboration in developing a directory and possibly a dedicated web-site. Also have talked to U. of Oklahoma, CSAVR, and CARF about the concept.”

Strategy 1.5.2. Development of face-to-face and online mentoring strategies and implementation of mentor triads consisting of learner, mentor and educator for creation, implementation and continuous monitoring of personal leadership development plans for learners.

Responsibility

- ☐ Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn, Mathews, St. Clair, Stephens)

Progress

Not yet addressed

Strategy 1.5.3. Development and implementation of face-to-face and online learning activities for mentors about mentoring.

Responsibility

- ☐ Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn, Mathews, St. Clair, Stephens)

Progress

Not yet addressed

Strategy 1.5.4. Development and implementation of general face-to-face and online learning activities for learners (mentees), e.g., personal leadership development planning, personal needs assessment approaches, to be implemented by interested educational resources.

Responsibility

- ☐ Task Group on Mentoring Strategies (Atkinson, Bitter, Christensen, Glenn, Mathews, St. Clair, Stephens)

Progress

Not yet addressed

Strategy 1.5.5. Promotion of the CORL through individual educational resources and the NRLR web site.

Responsibility

- ☐ Task Group on Leaders as Resources (Jim Bitter, Jim Dixon, Pete Griswold)

Progress

Not yet addressed

Objective 1.6. To involve people with disabilities in acquiring leadership skills with which to lead the profession.

Strategy 1.6.1. Recruit the involvement of professional groups, consortiums, educational resources and employers composed of people with disabilities as partners in the development of the NRLR project.

Responsibility

- ☐ Task Group on Diversity (Gary Hudson, Doug St. Clair)

Progress**Gary Hudson –**

“There needs to be further work on developing and implementing a recruitment plan to reach the traditionally underrepresented groups for leadership roles. This plan would benefit from further advice from the National Rehabilitation Leadership Resource participants on how to best proceed state by state; how to proceed on a broad national level, and suggestions and ideas on initial activities to launch this task group. There is still some clarification needed to prioritize and define how this group is to best serve, i.e., written journal articles, web site interactions, discussions and forums, and/or face to face advisory meetings.”

Notes:

Fred Menz –

“CRP Leadership Interest - Some of the CRP associations in Region V have expressed interest in developing a series or emphasis on leadership. We will explore this over the next couple of months with hopes to stimulate some actual programs and subsequently curriculum. Pete Griswold, of course, has been our point person in the region on stimulating the thinking. Some of that is starting to germinate in Indiana, Michigan, and Illinois.”

Ron Wisecarver –

“Identify attributes related to leadership early among employees. Create selection criteria. Encourage employers to provide time for employees to formally acquire leadership competencies.”

Strategy 1.6.2. Recruit learners with disabilities for participation in leadership development activities.

Responsibility

- ☐ Task Group on Diversity (Gary Hudson, Doug St.Clair)
- ☐ Jim Bitter (encourage applications for Paul G. Hearne Leadership Awards for People with Disabilities)

Progress

Jeanne Miller –

“The Region VI RCEP sponsors “Emerging Leaders” forums for young people from Independent Living Centers as a pre-conference to regional IL conferences. The forums are led by ILC directors. Two have been conducted thus far.”

David Brooks –

“Leadership recruitment issues - Operating the NCRTM Rehabilitation Recruitment Center has impressed upon us how truly disjointed the rehabilitation program is on the topic of recruitment. This goes for the recruitment of fresh graduates of graduate programs, recruitment of experienced personnel as well as recruitment of new students into the rehabilitation field. Obviously there are issues beyond the purview of this group; comparative low pay, public agency benefits that do not compare well to private rehab, poor quality information about public rehab, image of public rehab, etc. The recruitment effort is weak and to draw new blood into the rehab field is going to take a commitment to raise pay and upgrade the image of public rehab. Nevertheless, when develop-

Notes:

ing this web site, we discovered a near vacuum in this area. Leadership is nearly absent, other than the *Careers in Rehabilitation* publication (currently out of date and out of print) that RSA put out and the RRC. Nearly all that has been done to stimulate recruitment has come from Tim Muzzio's office, i.e., funding for both the *Careers in rehab* and the RRC itself. There are widespread complaints about the recruitment problem, but few actually do much to promote recruitment activities either in public rehab agencies or in rehabilitation education programs to bring quality students into the field."

Jim Bitter –

"The Milbank Foundation for Rehabilitation established a new program entitled "The Paul G. Hearne Leadership Awards for People with Disabilities." In honor of Mr. Hearne, the Foundation is giving ten people with disabilities and emerging as leaders in their respective fields \$10,000 to help them continue their leadership activities. The program encourages young people to apply. Five NRLR participants (Atkinson, Christensen, Dixon, Glenn, Griswold) submitted 10 names for contact by the Milbank Foundation."

Objective 1.7. To expedite learners' ability to implement personal leadership development plans by fast-tracking and operationalizing parts of NRLR while it is developing.

Strategy 1.7.1. Identify and prioritize NRLR development strategies for expediting access to the project by learners.

Responsibility

- ☐ Task Group on Fast-Track for Implementation (Bob Daniels, Jim Stephens)

Progress

Not yet addressed

Bob Daniels –

"The fast-track task group has discussed a range of issues and has had differing opinions about the direction it should go and what it should achieve. I recommend discussion during the California *Think Tank* for renewed direction for this task group."

Strategy 1.7.2. Initiatives by project partners for developing and conducting online learning activities.

Responsibility

Not yet addressed

Goal 2: To offer a competency-based range of quality leadership learning activities which enable learners to create a personal leadership development plan based on competencies and choice in learning modalities and methods.

Objective 2.1. To offer a range of leadership learning activities, including academic and professional development options, which address identified competencies.

Strategy 2.1.1. Recruitment of project partners from among educational resources, employers and professional groups for participation in the NRLR Initiative.

Responsibility

Not yet addressed

Progress**Dick Oestreich –**

“I think we should make participation in the NRLR project as appealing as possible, maybe even in the form of financial reward such as offering scholarships for participation and/or paid trips to seminars, either those sponsored by NRLR or others.”

Strategy 2.1.2. Enhancement and/or development of learner-centered delivery options including online learning activities by project partners.

Responsibility

Not yet addressed

Objective 2.2. To make learning activities responsive to learner delivery preferences including face-to-face groups, online anytime and anywhere, and one-on-one mentoring.

Strategy 2.2.1. In response to market interest, offer a mix of learning opportunities to future leaders among project partners based on formats preferred by the learners.

Responsibility

Not yet addressed

Strategy 2.2.2. In response to market interest, individual NRLR partners adjust, if necessary, the mix of educational delivery modalities and methods based on identification of learner preferences.

Responsibility

Not yet addressed

Notes:

Objective 2.3. To permit personal leadership development planning and programs for learners by creating learning activities that address all of the identified leadership competencies, and provide competency measures for identifying learning needs and achievement.

Strategy 2.3.1. Coordination among NRLR partners, and collaboration to develop learning activities if necessary, to ensure the availability of learning opportunities in each of the leadership competency areas.

Responsibility

Not yet addressed

Progress**Dick Oestreich –**

“Learners and trainers could be set up in cohorts or classes that assist one another and support one another toward a common goal. We may want to apply for a grant and set up an R & T center on rehab leadership attached to a university, — creating a virtual university with (at least 2 times per year) convocations for learners and trainers.”

Strategy 2.3.2. Adoption, or development, of competency measures for use in determining needs for personal leadership development plans, for monitoring learning programs and for recognizing completion of individual learner programs.

Responsibility

Not yet addressed

Progress**Dick Oestreich –**

“I see leadership and/or administration certification as a possibility. Also the competency measures could be developed using the Lominger (Leadership Architect) system as a good jumping off point.”

Appendix D

Journal of Rehabilitation Administration

Enterprising Initiatives

by Margaret Dempsey, Column Editor

The National Rehabilitation Leadership Resource

by James A. Bitter, Ed.D.

Rehabilitation Leadership Competencies for the Next Millennium

by Deborah E. Atkinson

Mentoring Considerations

by Margaret K. Glenn, Ed.D. and John M. Christensen

Enterprising Initiatives

by Margaret Dempsey, Column Editor

The following article written by Dr. Bitter provides an overview of the National Rehabilitation Leadership Resource, an initiative aimed at unifying efforts in the development and training of rehabilitation leaders. Part of a series, this piece emphasizes one effort of the initiative—the creation of a web site. Additional articles, each focusing on a unique dimension of the initiative, will follow.

The National Rehabilitation Leadership Resource

James A. Bitter
University of Northern Colorado

The Initiative

National Rehabilitation Leadership Resource is a name given by participants in a *Think Tank* held in Whitefish, Montana, during September 21-23, 1999, to an initiative to unify efforts among those interested in developing leaders for the rehabilitation profession. The initiative originated with the Rehabilitation Leadership Council, an advisory group of the RehabLeadership Project at the University of Northern Colorado. This group, consisting of core members and a rotation of guests, adopted a vision for “creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base.” The principal intent is to implement a coordinated effort among educators, employers and professional groups which results in a common frame of reference, enables collaboration which minimizes duplication, and permits a learner orientation. Ideally, learners interested in acquiring skills as a rehabilitation leader would be able to obtain such skills in a personal development plan from a variety of programs and using a variety of learning methods. The planning approach is similar to that taken with consumers of rehabilitation services.

As part of this effort, participants in Rehabilitation Leadership Council meetings developed a Special Issue on Rehabilitation Leadership Development for the *Journal of Rehabilitation Administration (JRA)*. The Special Issue, published in November 1997, offers six articles relating to leadership in the information age, competencies, the measurement of competencies, curricular delivery approaches, considerations for a curricular model, and the future of rehabilitation leadership.

The *JRA* Special Issue was followed with a Symposium conducted on the Internet, involving 31 rehabilitation leaders from around the country and focusing on the six articles in the Special Issue. Each article was the subject of discussion for one week of the six-week dialogue and was formally addressed with a brief reaction submitted in advance by four participants. These papers were posted to the Symposium listserv at the beginning of the appropriate week, and discussion among all participants ensued. Authors served as discussion moderators related to their article. The discussion was summarized at the end of each week.

In addition to numerous ideas for conceptualizing the development of rehabilitation leaders, the Symposium led to the face-to-face *Think Tank* held in Montana and hosted by the Rehabilitation

Leadership Council. For this there were 20 rehabilitation leaders. The *Think Tank* resulted in action-oriented ideas for implementing a unified system for the development of rehabilitation leaders. The unified system was characterized as: (a) national and focused on rehabilitation leadership; (b) market-driven and accessible to everyone in rehabilitation; (c) diverse, broad, and inclusive of ideas, organizations, resources, values, skills, culture, learning modalities; (d) grounded in principles; (e) proactive, current, relevant, cutting edge, future oriented; (f) maximizing resources and partners with other industries, and (g) exploiting technology. Action-oriented ideas included:

- Creating a web site devoted to rehabilitation leadership development
- Writing a paper on the concept of “letting go” by current leaders
- Writing a paper relating to desired attributes and core competencies for rehabilitation leaders
- Implementing a program of mentoring strategies
- Creating a program to utilize retired leaders as resources for future leaders
- Actively involving people with disabilities in achieving a unified system
- Developing a “fast-track” for the development of leaders

With leadership from new Column Editor Margaret Dempsey, the seven actions identified during the *Think Tank* in Montana will be subjects for future *JRA* “Enterprising Initiatives” columns.

The Web Site

One of the first actions implemented following the *Think Tank* was the creation of a web site focused on rehabilitation leadership development. Virginia Commonwealth University, with initiatives by Dr. Brian McMahon, volunteered to create and maintain the web site. Although it will always be a work in progress, the intent is to make it a central point of contact for those interested in leadership content. Learners can use it for finding and enrolling in learning activities related to leadership competencies. It can also be used by training programs for identifying gaps in leadership training opportunities and for identifying possible areas for collaboration. In addition, it can be used for finding web site and publication resources related to leadership. The site includes a chat room for periodic meetings in real time and a forum for dialogue on rehabilitation leadership issues. The web site contains the following main menu items:

Leadership Competencies

A primary function of the web site is to be an organizing mechanism for leadership courses and learning activities from many educational programs. A convenient way to organize learning activities is by competency. A task group is working on identification of attributes and competencies for the purpose of listing courses from educational programs related to those competencies. The list can also serve as a vehicle for learners to assess their personal development needs and create a personalized plan for growth.

Leadership Development Resources

This web site page, or section, is intended to identify rehabilitation leadership training programs at educational institutions and with employers who are willing to make their programs available as a resource. It contains identifying information; e.g., addresses, phone numbers, email addresses,

contacts, and, if available, web site URLs. These programs may also identify any eligibility criteria they might have for participating in their program.

Learning Activities

Linked to the *Leadership Competencies*, this section identifies courses and other learning activities available from the *Leadership Development Resources*. The information, in the form of course syllabi, describes the course, the competencies addressed, the content, and the delivery format. It may also identify instructors, assignments, evaluation measures and how recognition is given for participant performance in the course; e.g., academic credit, CEUs, certificates, certification maintenance.

Publications

This page on the web site can contain significant publications related to rehabilitation leadership development. This includes references to any media; e.g., text, video, and audio. These may be books, journal articles, newsletters, working papers, reports, videotapes, audiotapes, and CD-ROMs. It can also include relevant dissertation abstracts. Appropriate papers from this initiative are the paper on the concept of “letting go” by current leaders, and the paper relating to desired attributes and core competencies for rehabilitation leaders

Forum/Chatroom

The primary intent of the Forum feature is to afford opportunities for dialogue among those interested in leadership development. It can serve as a vehicle for “think tanks,” symposia, training sessions, and general interaction. Similarly, the Chatroom feature permits real-time meetings or discussions among rehabilitation professionals. Both the Forum and the Chatroom could have utility for communication between mentors and mentorees in the proposed program to utilize seasoned leaders as resources for future leaders. This may also be a tool for addressing the initiative’s objective for actively involving people with disabilities in achieving a unified system.

Related Web Sites

This is a place for links to other web sites related to leadership development. The page includes a brief description of each resource in addition to the web site addresses, or URLs (Uniform Resource Locator), and a link to the listed sites.

The web site for the National Rehabilitation Leadership Resource can be found at the following URL:

<http://views.vcu.edu/sahp/rehab/nrlr/>

Summary

The National Rehabilitation Leadership Resource is an initiative for unifying the efforts of training programs and employers for developing rehabilitation leaders. It is also a mechanism for creating a

system which can enable responsiveness to learners. By utilizing a web site as a focal point for communication, the initiative can inform learners of available learning activities, and permit choice by learners among learning opportunities and methods. It can also promote coordination among resources, collaboration in the development of activities, specialization in certain areas of expertise and interest and a common frame of reference.

Future issues of *JRA* will include articles about the National Rehabilitation Leadership Resource initiative in the “Enterprising Initiatives” Column. Papers are planned related to task group efforts; i.e., the concept of “letting go” by current leaders, desired attributes and core competencies for rehabilitation leaders, implementing a program of mentoring strategies, creating a program to utilize retired leaders as resources for future leaders, actively involving people with disabilities in achieving a unified system, and developing a “fast-track” for the development of leaders.

Editor’s Note

Editor’s Note: “Enterprising Initiatives”—formerly called “Bits and Pieces”—contains brief articles written mainly with rehabilitation administration practitioners in mind. The primary intent of the column is to share pertinent, practical information in a format that is quickly digestible, and which communicates enterprising initiatives vital to the profession.

Readers are encouraged to submit brief descriptions of innovative, administrative field practices and projects, reports of pertinent lectures, demonstrations, events, etc. Submit your entries along with your name, title, affiliation and location to Margaret Dempsey, RehabLeadership Project, College of Business Administration, University of Northern Colorado, Greeley, CO 80639, or phone (970) 351-2506. FAX: (970) 351-2500; Email: mdempsey@mcb.unco.edu

Enterprising Initiatives**by Margaret Dempsey, Column Editor**

The following article written by Deborah Atkinson is the second in a series of articles dedicated to the work of the National Rehabilitation Leadership Resource (NRLR). Emphasizing the importance of developing rehabilitation leaders, this piece focuses on critical leadership competencies.

Rehabilitation Leadership Competencies for the Next Millennium

Deborah E. Atkinson
NISH

The National Rehabilitation Leadership Resource (NRLR) is a name given to a group of rehabilitation colleagues who have been meeting together since 1996 with a common goal of identifying and adopting a unified effort for the development of vocational rehabilitation leaders. The goal of the group is not only to strengthen and grow current leaders, but to create new leaders who can “take the helm” as many of our best prepare for retirement.

Our profession has two primary training challenges before it. First, current leaders must learn to lead differently. Our organizations must become more businesslike and competitive if they are to survive, and our leaders must articulate new visions to those they lead. Our managers must change too. They must become leaders. Second, we must concern ourselves with succession planning. Our profession is beginning to experience the retirement of many of our most esteemed and seasoned leaders. This trend will both continue and escalate as many of those influenced by the social consciousness of the 1960s reach retirement age.

The NRLR consists of core and rotating participants who are deeply concerned about these challenges. These leaders envisioned the “creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community that results in a common set of skills that has high ethics, standards and a competency base.” The principal intent is to implement a coordinated effort among educators, employers and professional groups which results in a common frame of reference, enables collaboration to minimize duplication, maximizes resources and promotes a learner-driven orientation.

In order to achieve this vision, one of the first charges of the NRLR was to adopt a core set of leadership competencies that would serve as the cornerstone or foundation for leadership development activities. After much research and a review of current leadership theory and practice, ten critical leadership competencies were identified. At a recent NRLR *Think Tank*, the group overwhelmingly endorsed these ten critical leadership competencies for rehabilitation. Not only were the critical competencies adopted, but a set of common definitions for each of the competencies was ratified also.

These leadership requirements are generic, reaching across all leadership positions both within and outside of the vocational rehabilitation profession. They are applicable to both public rehabilitation agencies and private community rehabilitation programs. These competencies are consistent with the requirements of executives as well as mid-level leaders.

A review of leadership literature and several models guiding rehabilitation leadership/educational programs found significant overlap in the requirements or competencies identified for effective leadership, with many authors reporting the same attributes, characteristics or skills required of leaders. The competencies may be stated in slightly different terms by these authorities, but, upon careful review, virtually the same core information is validated. Therefore, this information can be condensed into ten critical leadership competencies which can easily be applied to the profession of rehabilitation.

Following are the ten competencies and their definitions. After each definition, references are cited which validate or anchor the competency. The information being presented is not new to those who have studied leadership. Rather, it collapses, condenses and summarizes the common ground or factors influencing leadership. The critical leadership competencies include:

1. *Inspires and influences others to follow.* Defined as: inspiring others, motivating people to follow toward a common goal and enlisting others; possessing the magnetism, passion, and credibility that make others want to follow (Covey, 1991; Kouzes & Posner, 1991; Maxwell, 1998).
2. *Creates vision and sets direction.* Defined as: envisioning the future and inspiring toward a shared vision; "pathfinding" as defined by Stephen Covey and "charting the course" as defined by John Maxwell; "providing direction; not providing directions" (Covey, 1991; Maxwell, 1998; Kouzes & Posner, 1991; Executive Update, 1999; Senge, 1990; Hall, 1994; Office of Personnel Management, undated).
3. *Focuses on "what might be."* Defined as: searching for what might be as opposed to what is; redefining markets, constantly searching for new knowledge, and continually looking for ways to satisfy customers and create added value; challenging the status quo, current processes and mental assumptions commonly held, searching for opportunities and taking risks; mastering, sometimes forcing change and fostering innovation and creativity (Kouzes & Posner, 1991; Senge, 1990; Quinn, 1988; Hall, 1994; Executive Update, 1999; Lombardo & Eichinger, 1996).
4. *Thinks strategically, has insight and sees long term.* Defined as: positioning the organization or work group to proactively respond to trends, possibilities and opportunities; using intuition, creating and building on momentum, "working" priorities, and taking advantage of the right timing to accomplish the vision/goals (Hall, 1994; Executive Update, 1999; Maxwell, 1998; Covey, 1991).
5. *Acts decisively.* Defined as: making decisions in a timely manner and making good decisions based upon a mixture of analysis, wisdom, experience and judgement; encouraging debate and diverse opinions in the quest to improve decision quality (Hall, 1994; Lombardo & Eichinger, 1996).
6. *Creates an environment that supports/encourages the vision.* Defined as: creating an environment, organization or work group that ensures success in achieving the vision/goals of the organization/work group; aligning processes, resources, personnel and structures to support the mission; leading the organization/work group in a way that maintains internal controls and integrity,

and moves the organization/work group forward; managing the organization/work group through realistic planning, goal setting, strategic budgeting, sound financial management; effective organizing, conflict resolution and problem solving, listening, creating information and free flowing, interactive communication systems, influencing/negotiating and evaluating efforts/results (Senge, 1990; Covey, 1991; Hall, 1994; Quinn, 1988; Lombardo & Eichinger, 1996).

7. *Leads by "best practice."* Defined as: practicing strategies that lead to personal and organizational/work group success; maintaining a customer focus, understanding the industry, having business acumen, managing through systems, and adjusting management style to the situation/organization/work group; maintaining external organization/work group awareness, reaching outside for resources and support, having political savvy and working effectively with boards/advisory groups (Hall, 1994; Lombardo & Eichinger, 1996; Senge, 1990; Covey, 1991; Office of Personnel Management, undated).
8. *Builds and develops a competent, diverse and empowered organization/workgroup.* Defined as: building and developing both effective workforces and organizations/work groups; empowering, enabling others to act, fostering mutual respect, and building effective teams while strengthening performance in individuals; strengthening others, encouraging the heart, mentoring, and reproducing/creating leaders within the organization/work group; ultimate goal is "creating a legacy," an organization/work group that can run and maintain its success without the (current/existing) leader (Maxwell, 1998; Covey, 1991; Kouzes & Posner, 1991, Lombardo & Eichinger, 1996; Quinn, 1988; Senge, 1990).
9. *Modeling the way.* Defined as: setting the example; "walking the walk" and living and leading by principles; leading by developing trust with others and practicing integrity, values and ethics that are in line with personal principles and the organization's vision/mission (Covey, 1991; Kouzes & Posner, 1991; Lombardo & Eichinger, 1996).
10. *Possesses self-knowledge, accepts responsibility and exhibits emotional maturity.* Defined as: knowing oneself and being willing to engage in personal change; motivating oneself, taking responsibility for personal behaviors and actions, managing one's emotions, recognizing others' emotions, handling relationships and making corrections as needed (Covey, 1991; Goleman, 1994).

Participants in the NRLR believe progress is being made in assisting our profession to create effective leadership. While these ten critical competencies provide educational institutions interested in leadership development with a framework or foundation on which to base curriculums and future work, the work of the NRLR in this area is far from complete. As we continue to build leaders, we will look at two additional critical areas. First, by focusing on the ten leadership competencies in this article, we will explore in greater depth the individual traits or skills that impact an individual's ability to become an effective leader. Second, mid-level leadership will be explored more extensively. Executives do not run organizations by themselves. Instead, they depend on managers who must lead the organization from within. Making managers into mid-level leaders will be an emphasis of further study.

Covey (1991) says, "leadership is, perhaps, the highest management competency." Maxwell (1998) states that, "leadership is learned over time and that skills compound. To lead tomorrow, one must learn today." These two authors have provided us with our challenge for the future.

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Editor's Note

Editor's Note: The efforts of the NRLR are still in their infancy. If you are interested in learning more about the NRLR's efforts or its work in the area of leadership competencies, or if you would like to join this volunteer group, please contact the author of this article, Deborah E. Atkinson, at datkinson@nish.org

Readers are encouraged to submit brief descriptions of innovative, administrative field practices and projects, reports of pertinent lectures, demonstrations, events, etc. Submit your entries along with your name, title, affiliation and location to Margaret Dempsey, RehabLeadership Project, College of Business Administration, University of Northern Colorado, Greeley, CO 80639, or phone (970) 351-2506. FAX: (970) 351-2500; Email: mdempsey@coba.unco.edu

Enterprising Initiatives**by Margaret Dempsey, Column Editor**

A series of articles dedicated to the work of the National Rehabilitation Leadership Resource (NRLR) continues with this piece by Margaret Glenn and John Christensen. Focusing on the continued need for leadership development in the rehabilitation profession, this article examines the role a formal mentoring program might play.

Mentoring Considerations

Margaret K. Glenn, Ed.D.
Virginia Commonwealth University
Richmond, Virginia

John M. Christensen
Hope Rehabilitation Services
Santa Clara, California

Interested in pursuing a national program to foster mentoring opportunities for rising leaders in rehabilitation, the National Rehabilitation Leadership Resource (NRLR) held a rich discussion on its web site during the summer of 1999 about the use of mentoring to facilitate leadership in the profession. Demands on today's leaders are more and more complex and require accelerated learning and development. A lesson can be taken from the corporate world, where a consulting survey of CEOs shows that 45% of those surveyed believe that senior-level executives need to develop new management skills in communication and enhance interpersonal relationships with employees. The CEOs reported being able to use mentors or coaches for help in a host of areas including time management, career guidance and business advice, as well as in relationships, family, wellness and spirituality (Linkage, 1998). This evidence cannot be ignored as we design a system for developing leaders in rehabilitation.

The participants in the online forum explored a wide variety of distinctions in both the concept and practice of mentoring, raising many questions and providing fertile ground for thought. The discussion moved from definitions to practical applications of mentoring programs that exist in business and human service environments. NRLR participants would like to share some of the experience with those who are thinking about developing a mentoring program.

Mentoring in Theory

An interesting foundation for our exploration is the examination of the root of the word mentoring. The term mentor appears to have come from Greek mythology where we find Mentor was a trusted counselor. Shea (1992) tells us that Mentor's work was to develop Telemachus, a counselee, for the responsibilities he was meant to assume in his lifetime. Given these powerful origins, it is no wonder that mentoring relationships have provided so many with value in their lives. In our contemporary language, mentor is defined as a wise and trusted counselor and teacher. How, then, can we facilitate these experiences to enhance our field?

Considerable material has been written about mentoring, what it is, how it works, for whom it works and its benefits. Mentoring may be viewed using two distinct approaches: 1) that mentoring happens between individuals as an unassigned, unplanned manifestation of interest in the betterment of an individual's life/career, and 2) that it is possible to provide a process to encourage and fortify the mentoring relationship.

These approaches are general, but they provide a foundation for our look at formalized strategies for facilitating a mentoring relationship.

Programmatic Strategies

A number of elements must be made available to encourage the utilization of mentoring relationships. These include:

1. definition and processes
2. organizational support
3. a selection process
4. an evaluation process

Viable definition/processes

Individuals involved in mentoring must be operating from the same set of definitions. Clarity in all aspects of the relationship will prevent potential future problems (Coast Guard, 1999; Shea, 1992; Sweeney, 1993). For example, in the case where a senior manager is monitoring a much junior supervisor, how do issues between the junior supervisor and his or her direct manager get handled? Such problems can occur between divisions also. It is wise to anticipate possible conflict and prepare participants in resolving such issues.

In exploring the definition in the discussion forum, NRLR participants introduced alternate terminology for mentor, including personal coach or peer coach. These terms lend themselves to allowing people participating in a mentoring program to define the relationships they are developing.

There are many examples of how mentoring programs have operationalized terminology in practice. For example, The U.S. Coast Guard (1999) has outlined four kinds of mentoring relationships:

- supervisory
- situational
- formal
- informal

These relationships are similarly defined in other literature. Shea (1992) defines them as:

- highly structured, short term
- highly structured, long term
- informal, short term
- informal, long term

We can use each of these approaches to define opportunities for mentoring program development in rehabilitation. The supervisory mentoring relationship already exists in the workplace, and all good supervisors mentor to a degree. Yet the effort is limited by time constraints and the need to balance attention among all staff or by difficulties which arise if the issue is a problem about the job or a desire to explore job alternatives. The recommendation is that supervisors encourage outside mentoring partnerships and allow time for them to develop (Coast Guard, 1999).

Situational mentoring is a “right help at the right time” approach, with the relationship often developing from spontaneous assistance (Shea, 1992). It is usually short term and addresses an immediate situation, but it can open an opportunity for a longer-term partnership.

Formal mentoring programs can be divided into two subgroups: highly structured, short-term and highly structured, long-term programs (Shea, 1992). The short-term relationship is often set up to meet a specific organizational objective, such as to introduce a new employee to the organization. Long-term efforts are often used for succession planning where the intent is to prepare a person to take over a job or master a set of tasks.

Informal mentoring efforts cannot be forgotten in this equation. People (mentees) seek out others for guidance, or individuals (mentors) look for those who can benefit from their experience (Coast Guard, 1999; Sweeney, 1993). These relationships can be very effective and are often encouraged and supported by organizations.

Organizational support

To reap the benefit of a mentorship program, the organization must be prepared to invest in both the program and the participants. This investment may be in the form of incentives, material and time. Time is a critical element, and the organization must view this program as value added, allowing the concession of time available to make the process work (National Mentoring Partnership, 1999).

The organization should avoid over-controlling the process. A mission and intent are important, but empowering the development of mentoring relationships will require that the organization turn it over to the participants.

Selection process

The process of selecting both mentors and mentees must be packed with integrity. To avoid hints of favoritism and to maintain the credibility of the program, participants must be selected from a uniform set of criteria. All employees should be comfortable with the who and why of selection.

Shea (1993) advises looking at investment as a starting point in the process. He outlines four categories of how mentee needs and mentor resources can vary over time, given the complexities of work and life situations. At any time, people can find themselves in relationships where:

- The mentor’s resources (time, skills, etc.) and mentee’s needs are low. Short-term interventions are probably adequate to meet both parties’ expectations.

- The mentee's need is high and the mentor's resources are low. This situation might require outside assistance (referral to counseling) or a move to a more appropriate mentor.
- The mentor's resources are high and the mentee's needs are low. This mentor will, in addition to providing occasional help to the original mentee, have the time and talent to help others.
- The mentee's need is high and the mentor's resources are high. The relationship has the potential, in this case, to be intense and very productive.

There are different stages that define the process of a mentoring relationship (Coast Guard, 1999). These include:

- *Laying the foundation* - getting to know each other; setting boundaries; establishing trust for open communication
- *Clarifying direction* - looking at possibilities and options; developing a plan to reach goals. This stage requires the most time and focus.
- *Helping the mentee grow* - opening doors; guiding and encouraging independent, critical thinking and decision making; leading the mentee to take risks, try new approaches, and build on successes for lifelong learning and development

More than having experience in a given area (Legacy, 1999), there are core values to this relationship and process. Integrity and trust are common themes throughout the process of mentoring. The mentor should possess basic talents (including pride in his or her work), relish new changes and understand and support the mission, vision, and values of the organization (Coast Guard, 1999). The mentee must have the intent to utilize the partnership and grow from the experience. Both parties should have respect for the process, which is built into the very foundation of the program by those who initiate it. A formal agreement can be beneficial and can allow organizational and individual support for the effort. The goal of the agreement is to set objectives for the mutual effort of two people (Shea, 1992), with an organizational support framework lending an important foundation.

Evaluation

The organization and the participants should know if the program is effective and should know how to improve the processes. Part of this includes goal setting and review from both an organizational and personal perspective. Finally, a mechanism should be put in place to indicate when participation in the program ends.

A process evaluation can track an effort and provide valuable input to the organization. This information can facilitate decisions to use organizational resources for further training or development of transitions in mentoring relationships (Sweeney, 1994). Outcome evaluations can also allow the mentors and mentees, as well as the organization, to see their progress. The keys to any of these evaluations are to respect the confidentiality of the relationships and to be supportive.

Creating Opportunities in Rehabilitation

Mentoring is a process that has been used in a variety of settings to increase the potential of employees in their work as well as to build careers. It is often discussed as a way of creating leadership in organizations by allowing individuals to learn from people who are masters in their field and are experienced leaders. In

conversations with human resource development people in rehabilitation agencies and organizations, we have discovered that many are planning for or implementing mentoring programs. These efforts may or not be coordinated with each other.

The questions then become, How have the values and core mission of rehabilitation been infused into these programs? Can we create a rehabilitation- and disability-based mentoring program that incorporates the aspects of mentoring as outlined in Figure 1? If so, who can take the leadership in this endeavor, and how can we evaluate the outcomes? Who will be involved, and how can it impact our field as the efforts of the next generation of rehabilitation and disability unfolds?

These questions lead us to a proposal—to create a national agenda, based on core values, principles and practices, that focuses on development of leadership in rehabilitation through mentoring. The challenge is to create the structure and the effort to make it happen so that we might find ourselves discussing an initiative seeking development of “qualified rehabilitation and disability leadership” not just “qualified rehabilitation counselors” (see Figure 1).

In Conclusion

The value in the development of a mentoring relationship lies in its ability to impact the lives of two individuals, mentor and mentee, and the organization and larger rehabilitation community. Leadership development and mentoring have become topics of considerable exploration and writing. Participants identified two such resources on the web:

- National Mentoring Partnership at <http://www.mentoring.org>
- Mentoring: Elements of Best Practices at <http://www.mentoring.org/bestpractices.html>

This look at the components to a mentoring program has been a brief one. It is not intended to be all-inclusive but rather to spark further conversations and interest. NRLR is interested in facilitated, well-planned, thorough programs that benefit organizations and individuals as well as the field of rehabilitation and disability services. If done well, such a program can provide an organizational legacy of involvement, development and concern for all.

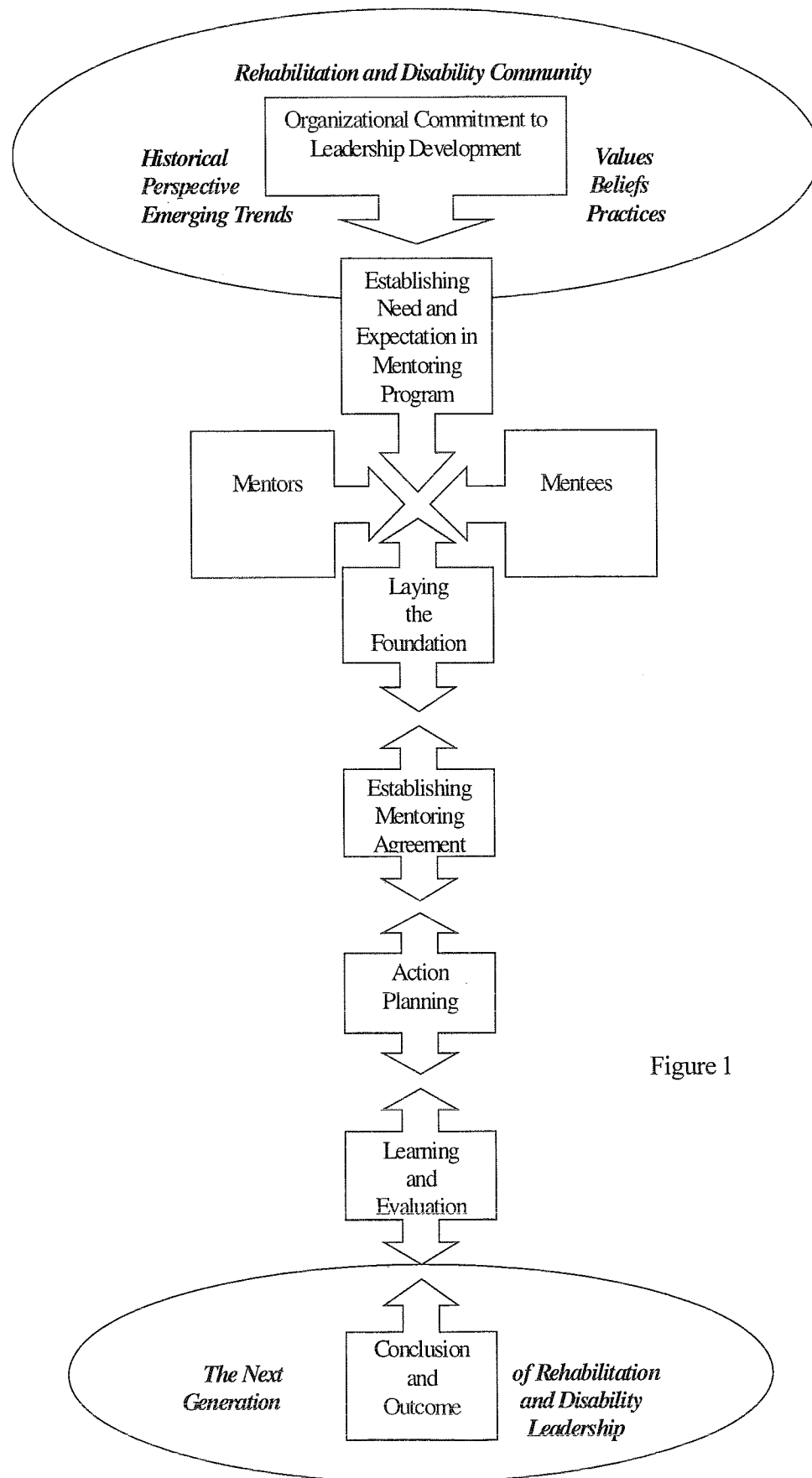


Figure 1

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Appendix E

NRLR *Think Tank* Report
Jackson, Wyoming
April 12-14, 1999
by Norman D. Grunewald, Facilitator

MAJOR OUTCOMES AND ACTION STEPS

The meeting of the Rehabilitation Leadership Development *Think Tank* achieved and surpassed its meeting goal to refine the concepts and components for a proposed unified approach/national plan for rehabilitation leadership development. This was accomplished by participants presenting their follow-up activities that have occurred since the last meeting in September 1998 and by their identifying the many actions that they plan to achieve in the months ahead. This report highlights the outcomes and summarizes participants' planned next steps toward achieving our goal to implement a unified system/national plan for the development of rehabilitation leaders.

JRA SPECIAL ISSUE ENDORSEMENT

Participants endorsed and agreed to participate in authoring a February 2000 Special Issue of the *Journal of Rehabilitation Administration* on the topic of "Rehabilitation Leadership Online," which may include the following areas:

- Education Online
- Learner Online Interaction
- Communication Online Within Organizations
- Organizing Service Delivery Online
- Online Accessibility
- Partnering Online
- Technology Leadership
- Ethical Considerations
- Environmental Considerations

ENTERPRISING INITIATIVES TOPICS ENDORSEMENT

Participants endorsed the following topics and agreed to author the following topics in upcoming issues of the *Journal of Rehabilitation Administration* Enterprising Initiatives column with Margaret Dempsey as column editor:

- National Rehabilitation Leadership Resource web site--by Jim Bitter by February 28, 1999 (accomplished)
- Leadership attributes and competencies--by Deborah Atkinson by April 30, 1999 (accomplished)
- Letting go--by Deon Locklin and Pete Griswold by July 31, 1999
- Mentoring strategies--by Jim Bitter by July 31, 1999
- Leaders as resources--by Pete Griswold, Jim Dixon and Jim Bitter by October 31, 1999
- Diversity--by Gary Hudson and Doug St. Clair by October 31, 1999

Fast-track for implementation--by Jim Stephens, Bob Daniels and Kathy Wilkins by October 31, 1999

NATIONAL REHABILITATION LEADERSHIP PROJECT PROPOSAL ENDORSEMENT

Participants endorsed and refined the National Rehabilitation Leadership Project Proposal (see Appendix A) which is an initiative to unify efforts among those interested in developing future leaders for the rehabilitation profession. Participants also identified private and public entities as potential funding sources to which the proposal could be submitted for consideration.

TASK GROUP ACTIVITIES REPORTS

Participants reported on task group activities that were undertaken since the last *Think Tank* meeting in September 1998. *Think Tank* participants discussed the progress that has been achieved and the next steps and actions that will be taken by each of the following task groups:

National Rehabilitation Leadership Resource Web Site

<http://views.vcu.edu/sahp/rehab/nrlr/> is the current Internet address for the new web site dedicated to rehabilitation leadership.

Think Tank participants are most grateful to Virginia Commonwealth University, with support provided by Jim Bitter, for the site design and management of the nation's first web site dedicated to enhancing rehabilitation leadership. The web site has the capacity for posting rehabilitation leadership academic courses, training events and publications, as well as learning forums and topic-directed chat discussions.

Participants reviewed the current web site, made suggestions on how to enhance its value, offered to post appropriate courses, training events, and publications on the web site along with creating linkages to their own web sites, and discussed conducting a five-week forum discussion on the topic of mentoring.

Allowing Succession, "Letting go" Concept

A subset of leadership development is to support building leadership capacity by encouraging leaders to promote and integrate newer leadership thinking and practices that are fluid, participatory and responsive to the changing environment and situations. This concept is an overarching piece of the whole initiative to rehabilitation leadership. Rehabilitation leaders should constantly be seeking ways to identify and cultivate future rehabilitation leaders. Succession planning is only one discernible way that leaders can take to create a positive legacy within their own organizations.

Participants discussed the "letting go" concept and offered suggestions on how to best pursue this important aspect of leadership development.

Leadership Attributes and Competencies

Participants reviewed and approved a core set of ten leadership competencies that can serve as the cornerstone or foundation for leadership development activities. Not only were the following critical competencies adopted, but a set of common definitions for each was ratified:

- Inspires and influences others to follow
- Creates vision and sets direction
- Focuses on “what might be”
- Thinks strategically, has insight and sees long term
- Acts decisively
- Creates an environment that supports/encourages the vision
- Leads by “best practice”
- Builds and develops a competent, diverse and empowered organization/workgroup
- Models the way
- Possesses self-knowledge, accepts responsibility and exhibits emotional maturity

Mentoring

Participants believe that mentoring can be a useful component of identifying and cultivating future leaders. A national mentoring program for future rehabilitation leaders was suggested. Participants agreed to contact key rehabilitation entities to learn from their experiences. Much can also be learned from organizations, such as the National Mentoring Partnership, whose mission it is to foster mentoring. Any mentoring program that is developed must be designed from the perspective and needs of the mentees.

Participants agreed to conduct a “Forum on Mentoring” this summer on the National Rehabilitation Leadership Resource web site. It was suggested that a five-week forum be held in which one week is devoted to each of the following topics:

- Mentoring definition and concepts
- Mentor skills
- Mentee self-development considerations
- Strategies for coordinating the implementation of a national mentoring program
- Strategies (continued) and summary

Leaders as Resources

Participants suggested the creation of a Corps of Rehabilitation Leaders (CORL) which would include anyone willing to make contributions to the development of rehabilitation leaders. While mentoring is an obvious component of utilizing leaders as resources to future leaders, the concept should be expanded to other assistive functions such as interim directors for organizations. The NRLR web site could be utilized as the focal place for information and interaction by the CORL program.

Participants suggested the involvement of others in the development of this concept such as the National Clearinghouse of Rehabilitation Training Materials at Oklahoma State University. Also,

participants encouraged collaboration with the Small Business Administration's Service Corps of Retired Executives (SCORE).

Diversity

Participants are acutely aware that the changing demographics of the American population must be reflected in the development of future rehabilitation leaders. Unfortunately, the field of rehabilitation lacks proportional representation of either the U.S. population or of consumers of rehabilitation services.

Participants are working to develop a model for assuring the inclusion of diverse groups in the National Rehabilitation Leadership Resource initiative. Such a model is likened to a circle with the dimensions of perception, sensitivity, appropriateness and understanding on the edge of the circle, with "embracement" at the center of the circle. A literature search will be conducted to identify ways to achieve greater diversity. Contact will be made with the National Institute on Disability Rehabilitation and Research to offer NRLR assistance in achieving the intent of a forthcoming announcement for a Disability and Rehabilitation Research Project to increase leadership competencies of individuals with disabilities, including people with minority backgrounds.

Participants will expand the number of participants in the initiative to include greater diversity of minority groups including people with disabilities. Accordingly, the participants of the next *Think Tank* meeting in September will be expanded to achieve involvement of representatives from diverse groups of people.

Fast-track for Implementation

This task group was asked to move the NRLR leadership development initiative ahead as quickly as possible. It became apparent that a political strategy must be developed which targets support from key constituents. Accordingly, a quickstart marketing plan will be developed, as well as pursuit of funding for the NRLR proposal which implements the components of the NRLR initiative.

Participants discussed the feasibility of the NRLR initiative creating its own nonprofit organization or linking with an existing one which has allied interests in rehabilitation leadership. This option is being actively pursued.

SEPTEMBER 1999 *THINK TANK*

Participants agreed that another *Think Tank* should be held by September 1999 in order to assess progress and to identify the next steps that need to be taken which will further achieve our goal to implement a unified system/national plan for the development of rehabilitation leaders. Jim Bitter was asked to be the *Think Tank* Chairperson for the next meeting; John Christensen graciously offered to be the *Think Tank* Host which will be held in the Santa Cruz, California, area. Following this meeting in Santa Cruz, the roles of *Think Tank* Chairperson and *Think Tank* Host will be rotated among initiative participants.

ADDITIONAL HIGHLIGHTS OF THE WYOMING *THINK TANK****JOURNAL OF REHABILITATION ADMINISTRATION* SPECIAL ISSUE ON “REHABILITATION LEADERSHIP ONLINE”*****JRA* Special Issue on “Rehabilitation Leadership Online”**

Guest Editor: James A. Bitter, Ed.D.

Target issue: February 2000 or May 2000

Format: monograph

Topics: Rehabilitation Leadership Education Online (Glenn and Locklin)

Learner Online Interaction (Bitter)

Partnering Online (Jones)

Organizational Communication Online (Dodson)

Online Technology Leadership (Adams)

Online Accessibility (Oestreich)

Number of pages: target is 64 pages

Authors: by invitation, with most authors expected to be from the National Rehabilitation Leadership Resource Initiative

Timeline:

June 15, 1999	Deadline for successful recruitment of authors with an outline of their topic and subtopics; followed by sharing them among authors
July 15, 1999	Deadline for complete manuscript drafts from authors; followed by sharing drafts among authors for Special Issue continuity
August 15, 1999	Completion of peer review of manuscript drafts with recommendations to authors
September 30, 1999	Deadline for final manuscript, author bio from authors on a word processing disk, and signed copyright release for <i>JRA</i>
October 30, 1999	Completion of peer review of final manuscripts
December 10, 1999	Final editing of the Special Issue and submission to <i>JRA</i>

NRLR PROJECT PROPOSAL

Participants added an objective/strategy to Goal 1 to make available to leadership learners a national network of rehabilitation resources targeted for the development of the profession's future leaders. A proposal was suggested to conduct this year, if possible, an Institute on Rehabilitation Issues (IRI)

for rehabilitation leadership. It is hoped that the University of Wisconsin-Stout will conduct this institute. Pete Griswold will approach Frederick E. Menz, Ph.D., about this topic nomination. Joe Mathews will ask that this IRI topic nomination be placed on the meeting agenda of the Human Resources Committee of the Council of State Administrators of Vocational Rehabilitation (CSAVR).

REPORT OF THE TASK GROUP ON THE NATIONAL REHABILITATION LEADERSHIP RESOURCE WEB SITE

Presenters: Margaret Glenn, Jim Bitter

Introduction

The web site for the National Rehabilitation Leadership Resource was reviewed with conference participants. They viewed the actual menu of information available to users of the site. At present, it includes:

- About NRLR
- Leadership Development Resources
- Learning Activities
- Publications
- Forum/Chatroom
- Web Sites
- Contact Information

Site Design and Management

During the presentation, it was noted that credit for development of the site went to Carolyn (Danczyk) Hawley and Mehdi Mansouri at Virginia Commonwealth University, under the direction of Drs. McMahon and Bitter. The site has been designed to be self-managing. Interested parties may register, obtain log on and password information, and enter data regarding publications and educational opportunities relative to rehabilitation leadership.

It was noted that overall management of the site has been provided by Dr. Bitter to date. It was suggested that the issue of continuing management responsibilities be discussed with the Department of Rehabilitation Counseling at VCU.

Adding Information to Current Menu Items

A participant inquired into the accessibility of the site to people with visual and other disabilities. It was reported that accessibility is a concern, and "Bobby" approval will be sought once the site is finalized. It might be necessary to have a Text Only/Graphics option for those who have difficulty downloading graphics or reading the site.

It was suggested that material be added to the About NRLR section. These suggestions include: an explanation of the bridge icon, Frequently Asked Questions, and a section on critical incidents/case

studies in rehabilitation leadership. Adding pictures from the *Think Tank* meetings to the text was recommended.

Participants were taken through the entry of data into the Learning Activities and Publications sections of the web site. It was noted that the approved Leadership Competencies will be added to the appropriate field, and this will allow data to be entered consistently across learning activities. Learners searching for specific competency-based training opportunities can then use this as an index. The size of some fields will also be expanded to allow more data to be entered into each field.

It was also recommended that an abstract field be added to the Publications section, as well as a link to an indexed explanation of the Leadership Competencies.

VCU will be making changes to the site over the next month, so participants were asked to wait to enter data. Notification will be made via email. Links to be added to the Leadership Development Resources and related web sites should be forwarded to VCU.

Adding Menu Items

A link to key professional membership organizations recommended by rehabilitation leaders would be a valuable resource. A speakers bureau section would also add to the availability of training/workshop resources. A person could access possible speakers, their expertise and vitae for specialized work.

It was suggested that the site be expanded to include a bibliography of rehabilitation leadership. In addition, there is the opportunity to include a link to the Retired Leaders as Resources activities and specific online documents such as rehabilitation leadership-oriented Institute on Rehabilitation Issues documents. It was also suggested that the *Journal of Rehabilitation Administration* might want to consider an online link to their journal publication.

Increasing Forum Activities

The web site has the capability of allowing the NRLR group to initiate conferences and forums. The announcement about mentoring that was already online was reviewed as an example. The participants decided to initiate two forums for information exchange and to increase NRLR involvement outside of the present group. These forums will be: (a) Mentoring in Rehabilitation, to be held during June 1999. The discussion will be facilitated by John Christensen. A flyer announcing it will be developed by John Christensen and Margaret Glenn. (b) Diversity in Rehabilitation Leadership, projected to be held during August 1999. This activity is being organized by the task group on diversity.

Marketing

There was discussion about the marketing of the NRLR web site, both for purposes of increasing knowledge of rehabilitation leadership resources and for increasing information available on the site. It was noted that the marketing strategies must acknowledge the volunteer nature of activities to date and proceed carefully.

The Future of the Web Site

Keeping the site up-to-date and informative was also discussed with the participants. The self-management nature of the site allows each NRLR participant to contribute in some way. As a result, each person was invited to contribute and did so as follows:

Deborah Atkinson will post NISH rehabilitation leadership training opportunities on the web site section Leadership Activities. She will also distribute a flyer about the web site and mentoring forum at the NISH annual conference in May 1999. She will also publish an article about NRLR in the NISH newsletter.

John Christensen will facilitate an online forum on mentoring in June 1999. He will publish information about the NRLR web site and mentoring forum through the Commission on Accreditation of Rehabilitation Facilities listserv as well as the California statewide listserv.

Bob Daniels will present information about the NRLR at the NISH board meeting, including information about the web site.

Jim Dixon, with Douglas St. Clair, will contact the Consortia of Administrators for Native American Rehabilitation (CANAR) regarding linkages with NRLR. He will also include information about the project in the CANAR newsletter and peer-reviewed journal.

Pete Griswold will follow up to list relative Institute on Rehabilitation Issues documents as well as related learning activities at Michigan University and University of Wisconsin-Stout.

Norm Grunewald will concentrate on developing marketing strategies for the NRLR web site.

Ron House will publish training related information on rehabilitation leadership in the Learning Activities section.

Gary Hudson will organize and initiate an online forum on diversity in August 1999.

Deon Locklin will post information about CRP-RCEP workshops and publications relative to rehabilitation leadership, as well as their monthly online discussion forum. In addition, she will include information about the NRLR initiative in the RCEP Information Brief and invite the other CRP-RCEPs to join the effort.

Joe Mathews will link the NRLR to the Council of State Administrators of Vocational Rehabilitation, contacting the Human Resource Development Committee for involvement. He will also further the concept of Leadership at All Levels: People as Resources.

Doug St. Clair will create a 4-5 page document relative to diversity discussion for publication online and to initiate the diversity forum.

Jim Stephens will relay information about the NRLR web site to the RRCEPs and create a programmatic rehabilitation leadership link.

Peter Vail will provide a link for the web site to the National Leadership Executive Institute, as well as list relative learning activities and publications.

Kathy Wilkins will contact training sources to list in the Learning Activities section of the web site.

Margaret Glenn will follow up with a reminder to participants of their planned activities via email. Outcomes will be monitored and reported at the next meeting.

REPORT OF THE TASK GROUP ON THE ALLOWING SUCCESSION “LETTING GO” CONCEPT

Presenters: Deon Locklin, Pete Griswold

Summary of Discussion

“Letting go” was a concept discussed at the Montana *Think Tank*. Deon Locklin and Pete Griswold expanded the initial thinking about the concept and created an abstract for the Jackson meeting, with intentions to subsequently broaden the ideas in a full article. However, there is need for further direction from the group at this time. What are our intentions regarding the concept of “letting go?” Does this concept reflect updated leadership principles that we want to infuse throughout all NRLR activities? Does it relate to leadership competencies? What is our ultimate message to existing and aspiring rehabilitation leaders, and how do we impart this message?

Discussion indicated that perhaps the “letting go” concept is our attempt to build on Mary Switzer’s commitment to succession planning, and, that as a subset of leadership development, we must address the fact that our rehabilitation systems contain pockets of inhibitory practices that do not support the practice of sound leadership or building leadership capacity. Also, we are not only talking about “letting go,” but also “what to do instead.” Finally, a part of our thinking also relates to John Maxwell’s work on creating legacy within organizations.

In general, by exploring this “letting go” concept, we are encouraging leaders to abandon leadership styles and practices that are based on rigidity, control and power. Instead, we want to promote, and integrate into all NRLR activities newer leadership thinking and practices that are fluid, participatory and responsive.

Action Items

The task group will:

proceed with the article for the “Enterprising Initiatives” column, using the above discussion points to expand the concept;

recommend, once the concept has been expanded, some additional NRLR action steps at the September meeting that link the concept with specific activities of other task groups (i.e., move from concept to application within NRLR), and revise the “letting go” terminology to better reflect the broader concepts.

Doug St. Clair, Peter Vail and Bob Daniels volunteered to assist this task group.

REPORT OF THE TASK GROUP ON LEADERSHIP ATTRIBUTES AND COMPETENCIES

Presenter: Deborah Atkinson

Summary of Discussion

In order to achieve the vision, one of the first charges of the NRLR was to adopt a core set of leadership competencies that would serve as the cornerstone or foundation for leadership development activities. After much research and a review of current leadership theory and practice, ten core critical leadership competencies were identified.

Critical Leadership Competencies

Inspires and influences others to follow

Defined as: inspiring others, motivating people to follow toward a common goal and enlisting others; possessing the magnetism, passion, and credibility that make others want to follow

Creates vision and sets direction

Defined as: envisioning the future and inspiring toward a shared vision; "pathfinding" as defined by Stephen Covey and "charting the course" as defined by John Maxwell; "providing direction; not providing directions"

Focuses on "what might be"

Defined as: searching for what might be as opposed to what is; redefining markets, constantly searching for new knowledge, and continually looking for ways to satisfy customers and create added value; challenging the status quo, current processes and mental assumptions commonly held, searching for opportunities and taking risks; mastering, sometimes forcing change and fostering innovation and creativity

Thinks strategically, has insight and sees long term

Defined as: positioning the organization or work group to proactively respond to trends, possibilities and opportunities; using intuition, creating and building on momentum, "working" priorities, and taking advantage of the right timing to accomplish the vision/goals

Acts decisively

Defined as: making decisions in a timely manner and making good decisions based upon a mixture of analysis, wisdom, experience and judgement; encouraging debate and diverse opinions in the quest to improve decision quality

Creates an environment that supports/encourages the vision

Defined as: creating an environment, organization or work group that ensures success in achieving the vision/goals of the organization/work group; aligning processes, resources, personnel and structures to support the mission; leading the organization/work group in a way that maintains internal controls and integrity, and moves the organization/work group forward; managing the organization/work group through realistic planning, goal setting, strategic budgeting, sound financial management; effective organizing, conflict resolution and problem solving, listening, creating information and free flowing, interactive communication systems, influencing/negotiating and evaluating efforts/results

Leads by “best practice”

Defined as: practicing strategies that lead to personal and organizational/work group success; maintaining a customer focus, understanding the industry, having business acumen, managing through systems, and adjusting management style to the situation/organization/work group; maintaining external organization/work group awareness, reaching outside for resources and support, having political savvy and working effectively with boards/advisory groups

Builds and develops a competent, diverse and empowered organization/workgroup

Defined as: building and developing both effective workforces and organizations/work groups; empowering, enabling others to act, fostering mutual respect, and building effective teams while strengthening performance in individuals; strengthening others, encouraging the heart, mentoring, and reproducing/creating leaders within the organization/work group; ultimate goal is “creating a legacy,” an organization/work group that can run and maintain its success without the (current/existing) leader

Models the way

Defined as: setting the example; “walking the walk” and living and leading by principles; leading by developing trust with others and practicing integrity, values and ethics that are in line with personal principles and the organization’s vision/mission

Possesses self-knowledge, accepts responsibility and exhibits emotional maturity

Defined as: knowing oneself and being willing to engage in personal change; motivating oneself, taking responsibility for personal behaviors and actions, managing one’s emotions, recognizing others’ emotions, handling relationships and making corrections as needed

As we continue to build leaders, we will look at two additional critical areas. First, by focusing on these ten leadership competencies, we will explore in greater depth the individual traits or skills that impact an individual’s ability to become an effective leader. Second, mid-level leadership will be explored more extensively. Executives do not run organizations by themselves. Instead, they depend

on managers who must lead the organization from within. Making managers into mid-level leaders will be an emphasis of further study.

REPORT OF THE TASK GROUP ON MENTORING

Presenter: Jim Bitter

Action Items

The task group will pursue involvement with various networks in a proposed National Mentoring Program; e.g., RRCEPS, CSAVR, ACCESS, ASAE and CANAR. Participants volunteering to take a lead in working with organizations were:

Jim Stephens - RRCEPs
Joe Mathews - CSAVR
Deborah Atkinson - Goodwill Industries International
Doug St. Clair - CANAR

The task group needs to determine which organizations have good mentoring programs, such as the University of Wisconsin-Stout, State University of New York-Buffalo (RRCEP), Georgia State University, and Goodwill Industries International.

A forum on mentoring on the NRLR web site should be conducted during June 1999 (perhaps the five weeks beginning Tuesday, June 1, through Friday, July 2) and include the following topics:

Week 1: Mentoring Definition and Concepts
Week 2: Mentor Skills
Week 3: Mentee Self-Development Considerations
Week 4: Strategies for Coordinating the Implementation of a National Mentoring Program
Week 5: Strategies (continued) and Summary

John Christensen will serve as forum chairperson. Preparation resources for the forum include the National Mentoring Partnership; the *Newsweek* Special Issue entitled "Be a Great Mentor" (which can be ordered for \$10.90 at 1-800-272-8306), and a qualitative study related to mentor-mentee relationships in VR agencies to be undertaken by Margaret Glenn.

John Christensen and Margaret Glenn will create an NRLR announcement (flyer) to promote the mentoring forum and for accessing the forum on the NRLR web site. Deborah Atkinson will use the flyer to promote the mentoring forum at the NISH Conference in Palm Desert, California, during May 16-19, 1999.

The task group will submit an article on mentoring to Margaret Dempsey for the *JRA* Enterprising Initiatives column by July 31, 1999.

The NRLR task group on mentoring was expanded to include Deborah Atkinson, Jim Bitter, John Christensen, Margaret Glenn, Joe Mathews, Doug St. Clair and Jim Stephens.

REPORT OF THE TASK GROUP ON LEADERS AS RESOURCES

Presenters: Pete Griswold, Jim Dixon, Jim Bitter

Summary of Discussion

The NRLR group received the preliminary report from the task group. It was agreed to pursue this endeavor. The task group should expand the personnel resources concept to include anyone willing to make contributions to the development of rehabilitation leaders, thus, eliminating the restriction to retired leaders. Reference should be changed from Corps of Retired Rehabilitation Leaders to Corps of Rehabilitation Leaders (CORL). The task group should expand the concept of leaders as resources from an emphasis on mentoring to include other assistive functions, e.g., interim directors for organizations (similar to the uses of seasoned executives by Goodwill Industries International).

Leaders as resources should take an inclusive approach, i.e., anyone can volunteer. The approach should permit mentors and mentees to find each other through a self-selection matching process. The CORL program should be self-managing to the extent possible.

The task group should collaborate, in whatever appropriate ways possible, with the SBA's Service Corps of Retired Executives (SCORE).

A specific need was noted in consumer-based organizations, many of which are in their fledgling stages. Particularly receptive may be the Independent Living Centers and the Native American agencies. There was a concern about where the parent organization be located due to the expected expense. One suggestion was the Oklahoma Clearinghouse that now has the recruitment data for individuals seeking employment.

The NRLR web site should be utilized as a central place for information and interaction by the CORL program.

It was suggested that the involvement of various programs in the concept be pursued, e.g., the National Clearinghouse of Rehabilitation Training Materials (NCRTM) at Oklahoma State University and other training programs with leadership components.

The NRLR Task Group on the Corps of Rehabilitation Leaders should be expanded by inviting experts such as David Brooks, Ron House and Owen Pollard.

An article on CORL should be submitted to Margaret Dempsey for the *JRA* Enterprising Initiatives column by October 31, 1999.

Action Items

Jim Dixon will continue contacts with SCORE.

Pete Griswold will meet with the Oklahoma Clearinghouse and with CARF.

REPORT OF THE TASK GROUP ON DIVERSITY

Presenters: Gary Hudson, Doug St. Clair

Summary of Discussion

A graphic presentation was shared by Doug St. Clair. The graphic presented as circular--as opposed to linear--thinking, focusing on balance and emotion. There will be four areas. Starting on the east side of the circle and moving counterclockwise are Perception, Sensitivity, Appropriateness, and Understanding. These quadrants surround Embracement, located in the center of the circle.

The Diversity group must be real, responsive, and not have developed out of tokenism. There is a need to locate the leaders to take over this area for the NRLR. Changing demographics indicate that people with disabilities should be the dominant and emerging group in the rehabilitation field.

The analogy "people cannot be on two canoes without tipping over" will be utilized to help minorities and various disability groups align separately and then together in common goals.

There needs to be further work on how to operationalize and expand the involvement of the various disabilities and other minority groups (race, gender, age, etc.). The group felt that the goals of the NRLR could not develop and succeed without these groups. A review of previous findings in the literature, RCEPS, and grants for what has worked be considered for inclusion in building this leadership model. Efforts will be to focus on utilization, not dissemination.

Action Items

Attempts will be made to try to collaborate with the March 9, 1999, NIDDER Minority Leadership on Disability grant, and to contact Donna Nangle in Washington, D.C. If located, Manuel Travino, formerly with the University of Northern Colorado Diversity Project, could be a wealth of information and history.

Journal publications on diversity will be developed for CANAR, *JRA*, and the NRLR web site.

An article on diversity will be submitted by October 31, 1999, to Margaret Dempsey for the *JRA* Enterprising Initiatives column.

The task group will be expanded to include Doug St. Clair and, hopefully, several others.

REPORT OF THE TASK GROUP ON FAST-TRACK IMPLEMENTATION

Presenters: Jim Stephens, Bob Daniels, Kathy Wilkins

In preparation for the Jackson Hole meeting of the Rehabilitation Leadership Development *Think Tank*, the fast-track group developed a consensus around the concept that in order to truly "fast track" implementation of the NRLR, a political strategy must be developed which would target

support from key constituents. Eventually, it will be necessary to develop consistent funding resources to enhance the collaborative effort required to thoroughly establish and maintain such a resource and to continue to improve and enlarge the effort in the future.

A political strategy is also necessary in order to anticipate and respond to the many issues which will arise concerning the falling away of old barriers and constraints such as dedicated geographic and demographic structures as technology expands our capacity to become much more accessible.

Spirited discussion at the Jackson Hole meeting stimulated the following recommendations from the large group:

- develop a quick start marketing plan for the effort (Mathews)
- switch the function of the large group to a major marketing effort (Daniels)
- focus on the web site itself as the major driver of the fast-track
- emphasize “need” as the dominant driving force in securing resources
- identify and develop a cadre of “like-thinkers” and supporters for fast-tracking (Griswold)
- submit an article to Margaret Dempsey for the *JRA* Enterprising Initiatives column by October 31, 1999

Three additional strategies were suggested:

1. Develop a short term political agenda for fast-tracking;
2. Move the effort forward by establishing a 501(c)(3) organization, and
3. Develop broad-based participation from everyone.

NEXT MEETING OF THE NRLR *THINK TANK*

John Christensen graciously offered Hope Rehabilitation Services in Santa Clara/Santa Cruz, California, to serve as *Think Tank* Host for the next meeting of the NRLR *Think Tank*. It was suggested that the *Think Tank* be held in September 1999. Participants encouraged having a similar format for the meeting except to begin the meeting earlier on the first day, such as 1:00 p.m. Participants want to increase the number of people invited to attend this upcoming meeting. Participants want to expand the ownership and visibility of the NRLR Initiative with key public and private officials while also assuring a greater diversity of participants. Jim Bitter agreed to serve as the *Think Tank* Chairperson. Lastly, participants agreed to send to Jim Bitter, by April 30, their available meeting dates in September for the California *Think Tank*.

Appendix F

NRLR Think Tank Report
Whitefish, Montana
September 21-23, 1998
by Norman D. Grunewald, Facilitator

On Leadership in Rehabilitation
by Frederick E. Menz, Ph.D.

*In Pursuit of a Unified Approach to
Rehabilitation Leadership Development*
by James A. Bitter, Ed.D.

MAJOR OUTCOMES AND ACTION STEPS

The meeting of the members and guests of the Rehabilitation Leadership Council produced a clearer understanding of the overall vision for a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base. Participants also identified many of the components of a unified system of rehabilitation leadership development.

Participants listed individually and then collectively the major benefits and limitations to creating this unified system. They also produced many recommendations on how to help accomplish that vision.

As this vision is still very much a “work-in-progress,” much of the meeting was centered on obtaining a better conceptual and practical understanding of what a unified system of rehabilitation leadership development will “look like” and how it will function.

Significantly, the level of support by participants for a unified system increased at the conclusion of the meeting. A pre- and post-meeting ranking of support for the concept was conducted. Participants were asked to rate their personal support for the concept by the following categories: 1 = unalterably in support, 2 = generally in support but have concerns, 3 = generally not in support but have an open mind, and 4 = unalterably opposed.

The pre-meeting ranking identified general support. Specifically, five participants rated themselves as being in category #1, thirteen in category #2, and one person in category #3. At the conclusion of the meeting, thirteen participants rated themselves as being in category #1 (an increase of eight people) while five were in category #2. No one rated themselves in either category #3 or #4.

Participants identified a menu of the following activities that could or should be acted upon which would help lead the field of disability, in general, and vocational rehabilitation, specifically, to create a unified approach to rehabilitation leadership development:

- each participant should identify twenty potential new leaders
- participants should develop a “fast track” of leadership development for this cadre of potential new leaders
- a select few current leaders in universities, public and private rehabilitation agencies should become the architects of the “fast track” training of future leaders
- considerable mentoring of current to future leaders is already occurring; an organized and structured system should be developed that both supports and encourages the networking of mentors and potential future leaders among and between themselves
- current leaders, perhaps led by the meeting participants, should develop a succession plan for themselves by targeting a potential new leader to fill their position and also another potential leader to fill that person’s old position

- an analysis of how college degree programs, and public and private service providers are already successfully identifying and cultivating future leaders should be conducted; much can be learned from this analysis including an understanding of the value achieved and return on effort
- training of future leaders should be flexible by accepting various competency models; competencies must be continually responsive to the external environment, especially to the needs of employers and businesses
- the efficacy of competencies for future leaders must be continually assessed and validated; this can be accomplished, in part, by learning from the experiences of colleges and universities as well as public and private providers such as Goodwill Industries International
- expand approaches to identifying and developing future leaders through macro-collaborations such as with Rehabilitation Services Administration's supported education and training programs

This menu of activities, in turn, served as a launching pad for assuring that the meeting would achieve follow ups sought by the participants. Most importantly, participants committed themselves to working on follow up activities that would help fulfill the vision of a unified approach. The following action steps were identified along with participants who volunteered to work on each:

ACTION STEPS

▪ **Continue the existing listserv that was created by Jim Bitter for the Rehabilitation Leadership Council members and guests**

The listserv allows for continued and ongoing discussion of leadership issues with a strong emphasis on working together to achieve these action steps.

Lead Participant: James Bitter

▪ **Create a Web site focused on rehabilitation leadership development**

The Website could become an integral vehicle for achieving a unified approach for rehabilitation leadership development. A few examples of its use include: 1) creating a home page whereby future leaders can access college degree programs and long distance training course curricula and competency models similar to that utilized by Professional Real Estate Education Online (www.preeo.realeducation.com/); and 2) adding interactive chat room(s) featuring open discussions or targeted topic areas.

Lead Participant: Brian McMahon with support by Fred Menz

▪ **Write a "think piece" on the concept of letting go by current leaders**

Participant Team: Deon Locklin; Peter Griswold; David Henninger

- **Draft a paper related to desired attributes and core competencies for rehabilitation leadership; include employer needs and validation of the attributes and core competencies**

Participant Team: Deborah Atkinson; Laurie Ford; Robert Daniels

- **Develop and implement a program(s) related to mentoring strategies; include employer needs and validation of the attributes and core competencies**

Participant Team: Fred Menz; Robert Couch; Brian McMahon

- **Develop a model, similar to SCORE, to utilize retired leaders as resources to future leaders and vocational rehabilitation agencies/organizations**

Participant Team: Peter Griswold; James Bitter; James Dixon

- **Assure the active involvement of a consortium of people with disabilities who represent consumer organizations as co-architects of the unified system as well as pushing for its implementation on a "fast-track"**

Part 1 - Achieve greater diversity, especially but not limited to, the active involvement of people with disabilities to the process for achieving a unified system of rehabilitation leadership development

Participant Team: Diana Huerta; Gary Hudson; each participant

Part 2 - Develop ideas and strategies for moving quickly ahead, that is, on a fasttrack, for achieving diversity of people as co-architects of the unified system of rehabilitation leadership development

Participant Team: Kathy Wilkins; Robert Daniels; Laurie Ford; James Stephens

Lastly, participants wanted to assure that the momentum of the meeting would be continued. Even though the costs for a subsequent meeting would be the responsibility of each participant, the consensus of opinion was to meet again before summer 1999. Gary Hudson graciously offered free rentals of the Old West Cabins at Jackson Hole, Wyoming. Gary has tentatively blocked the 14 cabins for use by the participants from Saturday, April 10 through April 14, 1999. Each participant should contact Gary Hudson at her/his earliest convenience to confirm her/his attendance.

Given that participants will be meeting in mid-April 1999, each should now begin work on the action steps for which she/he volunteered.

DISCUSSION

The remainder of this report highlights the key discussion points of the meeting that led to the commitment of participants to work on the previously identified "Action Steps."

The meeting of the members and guests of the Rehabilitation Leadership Council was keynoted by Fred Menz and Jim Bitter who each highlighted their papers on leadership. These papers, *On Leadership in Rehabilitation* and *In Pursuit of a Unified Approach to Rehabilitation Leadership Development*, were included in the manual that participants had read prior to attending the meeting.

On Leadership in Rehabilitation, Frederick E. Menz

Fred Menz highlighted the key points of his paper entitled *On Leadership in Rehabilitation*. Fred provided a macro-view of disability issues in America. He challenged participants on a number of fronts including the growing perception that people with disabilities may be viewed as a “fiscal liability” when totaling the costs of government programs. Although vocational rehabilitation is only \$2.3 billion of the total estimated \$500 billion targeted for disability-related programs, vocational rehabilitation will have to increasingly compete with training and employment programs serving other constituencies. Even though the vocational rehabilitation program is flawed, Fred believes that the outcomes achieved are not too bad.

Fred forewarned us that not just vocational rehabilitation but all of government funded services are on the edge of a significant period of transition. He mentioned Pete Griswold’s analogy of the danger of our building a “low bridge” into the future because we will have greater control of it versus building a “high bridge” that is much more inclusive and diverse.

Fred asks us what is the “context of leadership,” that is, what will future leaders look like? He outlined eight considerations that must be evaluated that will impact that context of future leadership. First, what will the future service delivery model look like? Second, the changing demographics of the country should and will be reflected by who will be the future leaders. Third, the “world view” of leaders toward people with disabilities and societal responsibilities will have an impact. Fourth, knowing which of the following service models (constituent dominated, human services, rehabilitation, government, community or business) will be in place is another consideration. Fifth, determining where control over resources will exist is also a factor. Will control be with consumers, government, private sector or public/private agencies? Sixth, what will that service delivery system be expected to do, to provide, to achieve and to be verified by? Seventh, where and how will future leaders be found? Eighth, Fred suggested developing a ten-year time frame for the training of future leadership.

Lastly, Fred challenges us to carefully assess these eight considerations as we go about the important task of developing future rehabilitation leaders.

In Pursuit of a Unified Approach to Rehabilitation Leadership Development, James A. Bitter

Jim Bitter’s excellent paper focused on four characteristics of, and corresponding suggestions to implement, a unified approach to rehabilitation leadership development. Jim identifies those characteristics as being: 1) comprehensive and flexible approach, 2) system of alliances, 3) competencies, and 4) competency achievement recognition. For each of these characteristics, Jim offers a variety of suggestions for its achievement.

Jim’s paper in particular helped focused participants on working toward achieving the objective of this meeting which was to identify and articulate the concepts and components for a proposed unified approach/national plan for rehabilitation leadership development.

These two papers served as the stimulus for participants to think about the issue of rehabilitation leadership development. A copy of these two fine papers are included as Appendix B and Appendix C.

Participants were asked to identify and write down their choices regarding a unified approach for rehabilitation leadership development for each of the following: 1) the three greatest benefits of a unified approach, 2) the three greatest limitations of a unified approach, and 3) the top three recommendations on how best to achieve a unified approach.

The choices were then aggregated into lists for each of the three topic areas. The participants were provided the next day with the list of the greatest benefits (Appendix D) and limitations (Appendix E) of a unified approach to leadership development as well as the list of recommendations (Appendix F) on how to best achieve the unified approach.

The summary for each follows:

The benefits of a unified approach are indeed many and varied.

The limitations of a unified approach can be summarized as 1) all the negatives that are typically associated with any system that becomes institutionalized, homogenized or standardized; 2) the pitfalls that can occur with collaborations; 3) potential turf issues among organizations and/or individuals; and 4) how to deal with competing competency measurement systems.

Recommendations for achieving a unified rehabilitation leadership development system focused on the following four general areas: 1) diversity of participants, 2) inclusion and collaboration of individuals and organizations, 3) competencies and attributes of leadership, and 4) technology and distance learning.

The issue of diversity, that is, expanding the participation and reach of future leadership development to people of all demographic considerations, was repeatedly discussed. In fact, it was the leading recommendation for achieving a unified rehabilitation leadership development system. From both the discussions and written comments of the participants, the following points were made with respect to diversity:

- Council members and guests should each identify and mentor someone, which will help achieve greater diversity, especially including people with disabilities
- the Council should affiliate with disability organizations to achieve greater participation with people with disabilities
- guidelines for achieving greater diversity should be developed and utilized
- schools should teach competencies needed for effective leadership
- guidelines should be developed for continuous leadership development

- Council members and guests should serve as role models by actively working toward replacing themselves on leadership activities with people with disabilities and other minorities
- Council members and guests should each develop a succession plan that replaces current members with potential new members who have leadership potential and who also have a disability or are of a minority group
- an environment should be created for developing opportunities for people with disabilities to cultivate their leadership potential
- a system should be developed to network mentorees together
- Council members and guests should move quickly on achieving greater diversity by shortening the timeframes for achieving desired results
- a means to both analyze and learn from college degree programs should be undertaken in order to know how to cultivate future leaders (that is, identify best practices)
- the architects of achieving greater diversity need to consider the needs of employers in terms of identifying competencies; those competencies need to be routinely validated

Council members and guests were interested in conceptualizing what a unified approach to rehabilitation leadership development would “look” and “feel” like. There was a strong need to identify the attributes of such a system. Therefore, participants identified the following characteristics of a unified approach:

- ☒ is national in focus
- ☒ focuses on rehabilitation leadership
- ☒ is market-driven
- ☒ provides access to young learners about the rehabilitation industry, particularly by exploiting technology
- ☒ is accessible to everyone in rehabilitation
- ☒ is diverse; broad; inclusive of ideas, organizations, resources, values, skills, culture, learning modalities
- ☒ is not duplicative or redundant
- ☒ cultivates knowledgeable rehabilitation professionals grounded in principles, etc.
- ☒ is open and receptive to a variety of environments and practices
- ☒ maximizes and clusters resources
- ☒ promotes synergy
- ☒ recognizes the best programs
- ☒ creates a world class and global set of best practices
- ☒ is a place that professionals can retire to
- ☒ accesses resources through networks
- ☒ is proactive, current, relevant, cutting edge, always looking towards the future
- ☒ partners with other industries, e.g. business, current players such as R.S.A. and disability groups, etc.

On the final day of the meeting, Fred Menz offered his understanding of what Council members and guests were discussing regarding a unified approach to rehabilitation leadership development. He presented his written outline to participants. His synopsis helped participants to gain a better understanding of both the conceptual and practical aspects to a unified approach. His outline, "National Rehabilitation Leadership Resource," is contained in Appendix G.

Additionally, Jim Bitter summarized some of the participant considerations, dimensions, and strategies that were discussed in striving toward a unified approach to rehabilitation leadership development. He highlighted the comments made by participants, and they are listed as follows:

✠ Some considerations toward achieving a unified approach:

- leadership can be an individual, team or organizational effort
- capitalize on the potential "synergy" among Council members and guests in order to form a nucleus of advocates and coordinators; this can be expanded to involve those willing to "let go" of control and tradition to allow those with leadership potential to grow
- leadership can emerge at any stage in life; Council members and guests need to cultivate awareness among those outside of rehabilitation, particularly employers, and also include young people
- utilize attributes that we value in rehabilitation leadership to identify potential leaders and focus on a core of competencies for developing their potential; these core competencies include skills specifically identified as "leadership" dimensions, rather than managerial competencies
- create a system for addressing a unified approach in a logical, systematic way and then apply some coordinating mechanisms which "tie together" best practices

The "System" for a unified approach to rehabilitation leadership development incorporates the following dimensions:

- is national and focuses specifically on rehabilitation leadership
- takes a diverse, broad and inclusive position with respect to values, ideas, culture, skills, and learning modalities, which can be accessed by everyone in rehabilitation
- is proactive and emphasizes relevant and cutting-edge knowledge and activity
- exploits technology for communication and coordination of the system and for learning
- provides a "fast track" for those with disabilities
- utilizes a formal network among resources (e.g. education, employers, associations) to allow access by learners

- seeks partnerships with other industries, particularly business, which also involves rehabilitation organizations, e.g. disability consortiums, RSA
- actively stimulates world/global class best practices
- is market-driven, e.g. responsive to learner demand

✠ Some “strategies” that Council members and guests may wish to implement include:

- contact disability consortiums with a proposal for involvement as co-architects of the system and “fast track”
- write a “think piece” on the concept of letting go by current leaders
- draft a paper related to the desired attributes and core competencies for rehabilitation leadership; include employer needs and validation of the attributes and core competencies
- develop and implement a learning program(s) related to mentoring strategies; include in such mentoring learning programs the creation of networks for/among mentors and for/among those mentored
- create a program similar to SCORE in the business sector for utilizing retired leaders

Peter Griswold shared his general thoughts and his views on the logical sequence of steps that could be taken to assure that the ideas of participants are acted upon.

First of all, Peter posed some of his questions which were then supplemented by participants. These questions may help serve to stimulate future thinking and action for developing rehabilitation leadership:

- ? What is the level of commitment to achieving a unified approach to rehabilitation leadership development?
- ? What is the expressed need for a unified approach? What is the rationale for it?
- ? What are the Council members’ and guests’ shared values?
- ? What are the Council members’ and guests’ vision for a unified approach?
- ? Are the limitations so overwhelming as to block the accomplishment of the vision?
- ? Is there a system in place to accomplish the vision?
- ? How are Council members and guests able to stimulate interaction with existing resources?
- ? Who will serve as coordinator for this project in order to keep the momentum going?

- ? Are there any additional financial resources to support a unified approach?
- ? How can the concept of SCORE be applied to developing future leaders?
- ? How can an on-line academy be created which would be focused on rehabilitation leadership and disability issues?
- ? How can existing knowledge and expertise be harnessed to develop the format of a vision for a unified approach?
- ? How can the content of the vision be further developed?
- ? What are the strategies to expand and reach out to others to realize the vision, e.g., network with junior and high school teachers on cultivating leadership development?

Peter Griswold provided participants with a suggested series of steps that could be taken to assure that the excellent ideas of participants are acted upon:

- ♦ determine the degree of commitment to a unified approach for rehabilitation leadership development
- ♦ identify what the framework of the unified approach will look like
- ♦ determine the expressed need and rationale for a unified approach
- ♦ provide a draft report back to the participants for their comments and revisions
- ♦ determine what each participant will need to do to help expand the concept and constituencies
- ♦ analyze the current system for rehabilitation leadership development
- ♦ identify resources that will be needed and are already available
- ♦ determine what the unified approach will actually look like
- ♦ determine how participants will “let go” of control and encourage future leaders
- ♦ identify who are the future leaders
- ♦ access existing knowledge and resources
- ♦ understand that skills and attributes take care of themselves in the system
- ♦ expand the size and diversity of the current Council members and guests
- ♦ develop a plan that identifies the next series of steps and sequence of events that will need to be taken

Jim Stephens shared with participants his thoughts on the following key issues related to creating a unified approach to rehabilitation leadership development: availability of resources (capacity), control, access, and maintenance and growth.

It was mentioned that RSA spends annually approximately \$38M for training. Less than 1% of that amount is actually spent on leadership training.

Lastly, participants had agreed to place important but unrelated issues into the list of "Parking Lot Issues." Those issues were as follows: a) discuss each participant's values; b) discuss what is "social justice;" and c) discuss the best practices of college degree programs.

ON LEADERSHIP IN REHABILITATION¹

Fredrick E. Menz, Ph.D.
Research and Training Center
Stout Vocational Rehabilitation Institute
University of Wisconsin-Stout
Menomonie, Wisconsin

August 28, 1998

I'm really pleased that I'll be able to be with you for a couple of days in September. However, I'm not really sure why Jim wants me to postulate on leadership. My own thinking goes along some rather defined lines. But, then again, what the heck. This will give you something to read on the plane or in a traffic jam someplace.

You should know that I have two ulterior motives in participating in this meeting: First, I've never been to Montana and I've always wanted to see where the Sail-and-Ski Regatta takes place. Second, I have a Dahlgren Fellowship which I'm supposed to use to look at, examine, collect, and develop a book outline regarding "human services for people with disabilities" as it may be provided at the community level. This opportunity permits me to go beyond strictly the "current design for delivery" and explore what a future system might look like; regardless of what you and I may think should be, must be, and must consist of.

Over a two-year period (I'm a year behind, so you see my second motive), my plan is to get involved in several groups like this, travel broadly across the United States, talk to a lot of people in the field, interview a lot of important people, and somehow get a renewed sense of what the human services arena **could be** irrespective of the systems we presently have. I therefore begin this written trip with an apology for having you become "subjects" in my personal study. It's the way I approach things, though.

Let me start by saying that I am quite concerned about where the rehabilitation enterprise will go, from where our leadership will come, and what might constitute rehabilitation after the year 2002 (I thought I'd avoid the "magic number" reflecting the "millennium"). This concern isn't with whether rehabilitation is viable or worthwhile or a failed hope or a waste of our time. Rather, my concern is with where it will go, who will lead it, and whether and/or where it will end up at. Will the possibilities offered through the Rehabilitation Act and the Americans With Disabilities Act be lost?

As we all know, federal and state legislation is driving wherein and how public resources will be directed, and we will likely see much effort put into redirecting resources away from people with disabilities: To populations that create the greatest burden to America's taxpaying base and to segments in those populations who have the greater potential for achieving socially responsible solutions. People without disabilities (as we think of people with disabilities) on welfare rolls and/or who are receiving any sort of public (and to some extent private; e.g., disability insurance, settlements through insurance) subsidy are viewed as most amenable to being affected with minimal public expenditures. Public efforts to consolidate our social responsibilities and compress associated costs could easily cause the disability issues and systems as we understand them to be caught up in front of the public reform broom (e.g., remember S.1619 in 1996 and H.R. 105-659 this year?).

People with disabilities will, in their own right, though, be viewed as a "fiscal liability" of some magnitude in the next couple of years, if we consider the significant dollars going to supporting people with disabilities: in poverty, on welfare, in medical supports, in subsidized housing, in transportation, in employment. Coelho, Chairman of the President's Committee on Employment of People With Disabilities, suggests that this figure is about \$500 billion per year to government; and vocational rehabilitation's \$2.3 billion is a very small part of that total. With these kinds of public dollars as a backdrop, concerns over reducing the

federal cost for disability-like cash payments and benefits (Medicare/Medicaid) present for all of us a problem of considerable magnitude: Every dollar spent on non-essential services or on payments of benefits for someone who does not work, represents a significant drain on resources that may be applied to stimulate the economy (i.e., through tax incentives) or to reduce the national debt (e.g., pay out beyond the interest payment which present federal budget ceilings permit).

Given the volume of public dollars being spent in this country, it is not too hard to imagine that there will be some sort of service-market created to absorb such dollars (e.g., the Florida, Texas, Massachusetts experience with privatizing formerly sacrosanct public services). And, if one goes beyond the 48 contiguous states, the market “in human need,” from an international capital sense, is simply crying-out for private sector enterprises to fulfill a service vacuum; especially if such enterprises can move across public-funding, private-resources, and need-lines that will probably exist, though subject to quite different regulatory conditions.

When I was a very young program evaluation² specialist (i.e., “graduate student”), struggling under guys like Bob Stake, Dan Stufflebeam, Jim Popam, Tom Hastings, Ralph Tyler, Benjamin Bloom, and J. P. Thurstone (e.g., the guy that figured out all the attributes of intelligence and creativity), Mike Scriven, then at Berkeley, had the audacity to suggest “goal free evaluation.” His point was in direct reaction to the Popam-Tyler-Stufflebeam evaluation model that insisted that evaluation of educational programs needed to be grounded in the “objectives” (or “intents”, as Stake proposed) of the enterprise and that a beneficial evaluation would be a “test of the extent to which expectations were met.” Meet your objective, your program was pretty good. Exceed those objectives and objectives of competing programs, even better. Scriven’s point (among many) was that our own hypotheses (and therefore the evaluative effort in curriculum development) must be inherently short-sighted unless it proceeded to find out not whether objectives were achieved, but how what was achieved was accomplished.

Scriven never sold well outside California; too little pragmatism and federal-state agencies funding educational innovations were duly terrified of possibly opening up such a Pandora’s box. A non-engineering approach to innovation (when we were proud of getting John Glenn on the moon, the first time) could not be grasped as a viable approach worth discussion (somewhat on the order of the present nondebate between quantitative and qualitative camps in research methodology). In that time of behavioral-engineering, you had to be able to specify the “animal” before you could have the resources to go out and do it (i.e., curriculum development, educational innovation). There was little credence given to any approach that was going to “go romping around in the woods” to define an educational practice.

While not to belabor this great evaluation schism of the 1970s, an adherence to a behavioral-engineering approach to discovery of innovations strongly influenced what we today know about effective educational practices and an awful lot of the “innovations” that came to fore in vocational rehabilitation came through very similar channels of thought. Despite my belief in empiricism predicated on strong theory, much of what is presently provided in our educational institutions came about, not through discovery or experimentation under non-laboratory conditions, as is often the accusation, but based upon “plausibility” respective to predictions of what would be found. More than we like to believe, I think, a whole lot of current practice is based upon what was expected, which is not the same as being based upon theory open to disclosure and evaluation. One has to wonder whether we may be proceeding along similar lines as we move toward “competencies³” for leadership and management.

As I turn from education and look at rehabilitation delivery, an awful lot of what we have “studied” is also predicated upon what we “expected” to find or what we “wanted” reality to be. We haven’t been too open to revealing the faults of our systems or of our practices (note the difficulty we are facing with the introduction of “performance outcomes” for services). We have retained our belief in the rightness of our goals⁴ and “expectancies” that we have, given that the system-practices are provided under compromising conditions and a fair amount of interference, our outcomes are not too bad: *Flawed though the system is,*

it is doing quite well; whether in the public or the non-profit sectors, the issue is wanting for resources, not for quality of resources.

Successively, the public and then the private non-profit sector have been brought up on charges regarding quality of services and significance of outcomes post-services achieved (state system of rehabilitation, or nonprofit sector). Too often the (our) reaction has been to assume one or more of the following postures: (a) Deny the reality of any flaws (as they're always expressed by a small group of dissidents); (b) project flaws onto others with control over resources (which if they were in our control we could have solved the problem); (c) implement new procedures (that reconcentrate resources and disperse responsibility); (d) redefine the causes of the problem (or define standards that require greater expenditure of effort and thereby redirect attention); and/or (e) pursue more resources (from other sources or through other sources or as sources that can be captured). This posturing has gotten the entire field into a very untenable condition and is probably hastening changes relating to rehabilitation as we know it.

Belief is powerful; belief limits our capacities if reality is not supportive to it. I think that we've bought too much into belief about the veracity (or failure) of rehabilitation as a system (or a monolithic non-system) and expect that the future will require leadership (or management) of a system that is a variation upon what we know at present. It is an erroneous assumption that we can protect and retain the way rehabilitation is; it needs to be better today and won't be good enough tomorrow. We are on the edge of a significant period of transition, not just in rehabilitation, but spanning the entirety of "services based in societal responsibility: family services, welfare, health, safety, behavioral health, education, training, among others."

As Pete Griswold puts it, we're fighting over how to design a "low bridge" into the future, because it is expedient, we can control egress, it fits our set of objectives, and has just the right number of lanes. Instead, we should be building a "high bridge" that lets others reach that new shore by other means, doesn't require that they go through us or that we move our low bridge out of the way. A high bridge can keep an open passage between that future culture and the values on our present shoreline.

Another false assumption is that the public will let the status quo continue and/or that change will be gradual and under our control (i.e., those of us presently working through the public and/or nonprofit sector). Well, right now, even our friends are unwilling to see the above postures as reasonable defenses. More and more, they too are reflecting underlying dissatisfaction with current systems (public, private) and are pursuing courses that are different and for which they may not have very precise compass readings. The term "thinking outside the box" hardly describes some of their lines of thought that are without our experiences, our history, our culture, our ideas about resources, our accepted principles, our systems and/or assumptions. And, as the next wave of "thinkers" come forward, less and less of what we prize (as models, as values, as principles) will be evident among the future culture or systems which they then lead.

I very much enjoyed the earlier opportunity that Jim organized as a forum to consider rehabilitation leadership training and the later production of the special edition of the *Journal of Rehabilitation Administration*. The upcoming forum will continue that line of valuable activities, I think. As I was preparing my reaction to Ken Shaw's piece (I was supportive to his five or so general predictions) and reading and listening to the dialogue, I kept getting the feeling that we'd simplified what it is that this whole issue of leadership is about. Skills and competencies (Daniels), measurable attributes (Ford), a finite set of capacities (Locklin, Atkinson), an issue of coordinated delivery (somebody must fit in here; probably Jim). So, I suggested that the "context of leadership" was what is being left out and asked "what do you think that leader is going to look like?"

Maybe, there are more things to consider, besides context as I suggested then, to consider. Let me suggest that there are five (I just picked that number out of the air, so don't be surprised if you find there are seven) contextual factors that we may need to consider as to how they are likely to influence (or should

influence) how we go about training of leaders and managers. These become part of the assumptions-base we each have to evaluate respective to what is tenable, saleable, unfashionable, and meaningful:

1. The delivery model we anticipate, fear for, or hang on to. Another way of putting this is, "what we really believe is essential and what or must we be willing to give up?" What is it that we wish to be part of the resource, mix, and mind-set that will be included in the movement to another shore? Is the Rehabilitation Act about rehabilitation programs or about what we believe people with disabilities deserve, what they should expect for themselves, what we expect of them as fellow citizens?
2. Who leaders might look like and what they will do. The populations where leadership will likely come will carry not only the passion to "provide" or to "assure" or to "serve", but cultural values (e.g., perhaps differing ideas of the importance of work) and ethos (e.g., where and how important decisions are reached), and corresponding actions that will parallel such beliefs (e.g., the weight given to trust as opposed competence). Probably, these leaders will be persons of color, women, first or second generation "Americans," have multicultural values and roots, and be caught in contradictions of popular images of America and the culture of their parents.
3. What their world view is like. These may be viewpoints that envision disability as "within-us," as a natural state, as a "problem of national magnitude," as a societal-environmental weakness or view society and systems as created to serve the greater interests-numbers or society-systems that protect the interests of the few with need (or with power) or view issues and solutions to problem as of a societal, community, or from a world perspective.
4. Which of these "service" models are likely to be in place:
 - A. Constituent dominated, with focus upon disability issues, changing environments, achieving equal access;
 - B. Human services, with societal responsibility assigned to provide essential social and welfare services to indigent citizens;
 - C. Rehabilitation, driven by the values, principles, and expectancies for citizen participation in American society;
 - D. Government, with public fiscal resources and social responsibility vested in systems that aide and provide protections and safeguards for identified targeted populations;
 - E. Community, with designated responsibility to address citizen, social, and economic sector needs as they evolve in relation to community priorities; or
 - F. Business, with services provided in relation to customer value, availability of resources to purchase, sustained market share, and economic returns.
5. Where control over resources actually resides:
 - A. Consumers, as having responsibility and bearing consequences of when to draw upon and apply fiscal resources;
 - B. Government, as responsible for legal-ethical distribution among needy petitioners;
 - C. Private sector, as expected (or regulated) to apply resources in keeping with market conditions and chartered responsibilities; or
 - D. Intermediate agents/agencies, as manager of public-private resources to assure continuing access and accountability.
6. What the service delivery "system" is expected to do, to provide, to achieve, to be verified by:
 - A. Consumer, individual need-based, emphasis on quality and effectiveness;
 - B. Payor, agreed upon units in relation to minimal need, emphasis on effectiveness, efficiency, and compliance;
 - C. Society, maximum impact among populations or arenas of need, emphasis on equity and efficiency;

- D. Stockholders, market driven and customer quality referenced, emphasis on satisfaction, efficiency, and economic return; and
 - E. Other beneficiaries, others' needs driven, emphasis on advocacy and sustained benefit.
7. Where and how we go about finding leaders: What we do now; what we invest in them, what we stop doing in five to ten years.
- A. Our challengers, people who really shake up attitudes and make us uncomfortable with what we are presently able to do or who seem to clearly know where we are failing (e.g., the scary boyfriend of our youngest daughter);
 - B. Our replacements, people we will trust to continue on to do the job as we see it, manage the system, or lead the transition as we envision it or wish that others would share our viewpoints (e.g., the student you really think has potential that you want to mentor);
 - C. Their challengers, today's outsiders who are presently without a following and who we don't yet even recognize, hear about, and who really are from another planet (e.g., the son-in-law you always "dreamed" about);
 - D. Their replacements, tomorrow's insiders who will offer a better package; the "operating system" that wraps around the many constituencies (e.g., that person from the other side of town that really did see the whole picture; the high school junior who is now volunteering to work on people issues in your community).
8. A longer look-see. I suggest that, as we sit together to talk about training for leadership, we also take a ten year view of what and how transitioning of human services (especially as we desire or perceive rehabilitation as a part of that transitioning) must influence identification of potential leaders and creation of opportunities that are more or less appropriate in their training and preparation. I suggest three segments for planning purposes:
- A. First segment, the four years beginning on August 15, 1998 with passage of the Rehabilitation Act. This is the period of time to "look around us" to see (a) who is going, (b) try to identify who are the "comers," and (c) start the matching process. These are the emigrant-leaders who can be the girders of either our low or high bridge. They're likely to be in our classes now, in mid-management, or those really crazy people who are getting into the field from other arenas (e.g., business-transfers) with a cause. They're going to be sorting out what to keep, what to bury, and, I think, will be the "bearers" of rehabilitation culture.
 - B. Second segment, four years, from 2002 when much of the reforms will be coming together and current leadership will be pretty much gone. This is the period of time to "look around others" to consider what administrative, managerial, and advocacy supports will be needed for those transitional leaders to build the next colony, to put the "facilities" in place.
 - C. Third segment, the final two years, to "watch what happens" and begin the process of extending the colony inland and toward principles we believed were worth carrying through or which need to be divested as no longer valid to the status of people with disabilities. We must, I think, begin to imagine and envision this period, when we will not only be watching, but will become the beneficiaries of the leadership which we cultivate between now and then.

Leadership, to me, is part skills, part savvy, and part significant endorsement. I don't know to what extent any of us here today would consider that leadership comes about as a result of some "training" experience. A good manager, a good CEO, or a good team leader probably all share certain traits; not the least of which are intelligence, flexibility, vision of what needs to be, and the communication skills (not necessarily verbal) to cause others to buy into that vision. A bit of a snake oil salesman; perhaps. A bit of the

pragmatist; probably. A bit of a “cause in search of a rationale,” probably. Some, but not all of these, have been subjects of many research studies and efforts to develop leadership screening instruments.

As we now look toward the actual task at hand, let me share with you some criteria we might apply as we move from leadership and get onto giving priority to competencies we deem necessary for this “new leadership.”

Criteria for Evaluating the Appropriateness of Proposed Competencies for Training Leadership in Rehabilitation, Presented in No Particular Order, and Suggested Bi-Polar Dimensions Along Which You Can Check Your Personal Judgement or Any Place Your Heart Desires		
Protection	...	Preservation
Whose ass	...	Who benefits
Transitional	...	Transactional
Reaction	...	Attribute
Blueprint	...	Building code
Control	...	Growth
Exclusion	...	Inclusion
Yesterday	...	Today
Me	...	They
Procedures	...	Culture
Process	...	Concept
Rule	...	Benchmark
Formula	...	Parameters
Us	...	Others
Lead	...	Manage
Envision	...	Lay out procedures
Today	...	Then

Jim (Bitter, our host) has wisely thought to bring together many people who are most intimately concerned with leadership, especially from the standpoint of what our graduate and inservice education efforts should be directed toward and the need in the public program to replace contemporary leadership. This is a distinguished group, representing well the public and the private enterprise “presently” know as “rehabilitation.”

I wonder, though, what sort of course will we pursue as we attempt to envision “leadership training”? Will our objectives require us to stay with our present-based expectancies of the future? What weights will we, can we, must we assign to the phenomenon-unknown-at-present, to desired attributes, and to our assumptions about what we are unfamiliar with and what “might be”?

When I get to Flathead, I'll be very interested in seeing whether the "future" comes with us. Which is, to get to the important point, my entire point and reason for this presentation: What are our assumptions and how well have we embedded them into what we conceive to be a design for curricula and a competency base for our graduate and our continuing education? What will be the terrain upon which rehabilitation plays out? Who is likely to be involved and direct what happens? What are likely to be the values, expectations, and their principles "de rationale"? In what context do we really expect our "students" and/or "peers" to play out the future that "they determine"?

I believe there are the above 8 considerations (I really did lead you on) that you and I must think very carefully through as we propose and develop curricula driven by core competencies. Perhaps, after you consider them, the obvious competencies will not be those needed, while others will be. Perhaps, after you consider this line of thinking, you may conclude that the "body of need" may not fit with our "contemporary" view of competence. Or, perhaps after you have read this, you'll just get onto the task at hand, and I'll go off to gaze out at the mountains and start thinking about something else: Why birds fly, whether the world would really be better off without wolves, and whether there are really four types of "error" in experimental science⁵.

In conclusion, I think the task at hand is the "discovery" of leadership: transitional (our prodigies) and "substantive" (those we may only be threatened by). The task at hand is to identify individuals whom we think have the greatest potential to do the greatest good (or cause the greatest alterations to faltering systems) and offer the greatest alternatives as to what must be done. And then, to put into them the experiences, skills, and tools to achieve the systemic goals which I think many of us retain, foresee, but will not be able to achieve in our lifetimes. And, transfer the culture, values, and compassion that will permit them to let go of our goals for ones that are substantially better and more achievable for people with disability and/or rehabilitation needs.

Notes

¹This paper was written without anyone's blessing, though I expect some federal funds were used in the process. I decided it would be in good taste not to indicate which funding source, though, least they wish to have equal time and/or require me to state that the opinions expressed in this paper are not those of any governmental foundation. Of course they aren't! They're purely my own; except for those I purloined from others and craftily disguised. Further, they were written under the influence ... of many other events, not the least of which was a great need for rest, institutionalization, or a good dose of Jerry Springer ... can you believe that guy?

²Evaluation is the search for kings when all you have are dukes.

³Being clear about your objectives is half the battle; the other half is being sure the objectives are worth the effort.

⁴Goals are place-holders, they're not reality.

⁵Type I error is about being wrong, while sounding right. Type II error is about sounding wrong, while right. Type III error is about being wrong and right at the same time. Type IV error is about still having to act once all the hypotheses have been eliminated.

IN PURSUIT OF A UNIFIED APPROACH TO REHABILITATION LEADERSHIP DEVELOPMENT

James A. Bitter, Ed.D.
RehabLeadership Project
College of Business Administration
University of Northern Colorado
Greeley, Colorado

August 31, 1998

In recent years the RehabLeadership Project and its Advisory Council have been involved in attempting to stimulate a national effort for enhancing the leadership and management skills of professionals in vocational rehabilitation organizations. An emphasis was given to partnerships among rehabilitation resources in order to facilitate the design, development, delivery and dissemination of rehabilitation leadership development. The vision established by this Council was the "creation and adoption of a unified system of rehabilitation leadership development for a diverse vocational rehabilitation community which results in a common set of skills that has high ethics, standards and a competency base."

As part of this effort a Special Issue of the *Journal of Rehabilitation Administration* (JRA) was developed and published in November 1997. It contains six articles. The content of the articles relates to rehabilitation leadership in the information age, competencies, the measurement of competencies, curricular delivery approaches, considerations for a curricular model, and the future of rehabilitation leadership.

The JRA Special Issue on Rehabilitation Leadership Development was then the focus of a Symposium, conducted on the Internet during December 1997 and January 1998, which involved 31 rehabilitation leaders from around the country. The purpose of the Symposium was to generate dialogue for considering the development of future rehabilitation leaders. The format of the Symposium was to discuss one article each week. Authors served as moderators for their topic. Brief reactions written in advance by Commentors for each article were posted to the listserv at the beginning of the appropriate week. The articles and Commentors' reactions started the dialogue among all participants.

The Symposium resulted in considerable thought about the status of leadership development in rehabilitation and numerous ideas for advancing our efforts. Although recognized as an ambitious task, Symposium participants reinforced the desirability of a national approach that involves multiple education programs and employers. In addition to encouraging a national approach, the Symposium discussion supported an emphasis on continuing education as the preferred approach, inclusion of distance learning approaches, a distinction between leadership and management skills, competencies as a curricular guide, alliances for delivering a curriculum, individualized experiential activities in learning activities, and the measurement of competency achievement.

Fred Menz, in his paper "On Leadership in Rehabilitation" developed for this *Think Tank*, offers an insightful challenge to us to discuss leadership development in the context of a profession in transition. For him, the tasks are to identify the leaders with potential for shaping the future, provide them with the experiences, skills and tools to achieve systemic goals, and allow them "to let go of our goals for ones that are substantially better" for people with rehabilitation needs. Fred endorses the assertion by Pete Griswold that "we're fighting over how to design a low bridge into the future, because it is expedient, we can control egress, it fits our set of objectives, and has just the right number of lanes." For Pete and Fred, we should be "building a high bridge that lets others reach that new shore by other means, (and) doesn't require that they go through us or that we move our low bridge out of the way. (The) high bridge ... keeps an open passage between that future culture and the values on our present shoreline."

Fred offers a number of considerations for us as we conceptualize a plan for addressing the development of our leaders for the future. I have focused on only a few. For example,

1. "It is an erroneous assumption that we can protect and retain the way rehabilitation is; it needs to be better today and won't be good enough tomorrow"..... "Flawed though the system is, it is doing quite well; whether in the public or the non-profit sectors, the issue is wanting for resources, not for quality of resources;"
2. "we will likely see much effort (from non-rehabilitation constituencies) put into redirecting resources away from people with disabilities;"
3. "there will be some sort of (private) service-market created to absorb (public) dollars.....(which) can move across public-funding, private-resources, and need lines;"
4. Consider "three segments for planning purposes," i.e. (a) during 1998-2002 seek out those "emigrant-leaders who can be the girders of either our low or high bridge," (b) during 2002-2004 create the "administrative, managerial and advocacy supports needed" for those transitional leaders to put the (systems) in place, and (c) during 2004-2006 extend those supports and systems toward principles we believed were worthy and/or need to be divested as no longer valid.

Within the context of Fred's view of the future, this proposal focuses on four major dimensions evolving from the JRA Special Issue and the Internet Symposium, i.e., a comprehensive and flexible approach to educational delivery, a system of alliances, competencies, and competency achievement recognition. It is a modest proposal, hoping only for an action-oriented step in the right direction. Ideally, consensus for the specific components of a leadership development effort would emerge, a common set of competencies would be adopted, and a single approach to competency measurement would be endorsed. Realistically, it is recognized that players in this effort have vested interests. Perhaps, consensus can be achieved for designing an approach that allows and acknowledges our differences, and yet enables "a unified effort."

Comprehensive and Flexible Approach

Several participants in the Symposium took the position that continuing education is the approach of choice for development of leaders. However, a guiding principle in creating a unified effort must be "inclusion" rather than "exclusion." A comprehensive approach to leadership development can encompass all rehabilitation training programs interested in this area. This includes degree programs, continuing education, mentoring, technical assistance and any other approach to learning. Programs, undoubtedly, vary in terms of inclusion of competencies in their curriculums, in terms of learning objectives and in terms of approaches. Suggesting a comprehensive approach entails learning opportunities in multiple formats, e.g. face-to-face, distance learning and mentoring. Flexibility can also involve the concept of learner empowerment. Learners can be empowered to participate in learning opportunities on their own schedule, using their choice of methods and their choice of educational resources.

A comprehensive and flexible approach to educational delivery also permits us to address, or is responsive to, Fred's contextual factors, especially changing rehabilitation delivery models, what future leaders might look like and what they will do, and what their worldview is like.

The use of technology is also encouraged. Technology for delivering training will continually increase and has many educational advantages, e.g. multiple media, information access, documentation, repetition. A comprehensive and flexible approach to leadership development will incorporate the use of computers, the Internet, and other electronic aids in all educational programs, whether on-campus, by distance, or in the workplace. Face-to-face and distance learning strategies can be integrated. For example, on-campus learners can work together on group projects via a listserv; thus, minimizing a need for finding common meeting times and providing a convenient vehicle for documenting the work of the group and each individual

in the group. Distance learners within an organization can participate in learning activities together; thus, offering a face-to-face job application dimension.

Suggestions for a unified approach

- Adopt Fred's suggested 10-year planning period and framework as a guide for cultivating more specific plans for developing leaders.
- Adopt the principle of "inclusion" for cultivating a unified approach to the development of leaders.
- Integrate face-to-face and distance learning activities. Utilize online learning activities, e.g., instructional web sites and listservs, for encouraging integration within and among programs.
- Create a dedicated Web site for Rehabilitation Leadership Development which lists competencies, identifies courses/learning activities of participating programs by competency, provides a calendar of scheduled courses offered by educational programs, provides links to the course provider and course syllabi, and gives enrollment information.

System of Alliances

Fred's prognosticating includes many stakeholders as potential players in the systems of the future, e.g. constituents, communities, businesses, and governments. He makes various other stakeholder references, e.g. human services, rehabilitation, family services, welfare, health, safety, behavioral health, education, training. Within our relatively small vocational rehabilitation world we have tended to compartmentalize, e.g. public program and community rehabilitation programs, which is often viewed as public program vs. community rehabilitation programs. We know that the integration of resources is becoming increasingly important. Perhaps building the "high bridge" by integrating resources requires the perspective of consumers, the target of our multiple stakeholders. During the Symposium, Bill Mead offered a concept with potential implications for rehabilitation leadership development. Bill feels that leadership in rehabilitation must come from leadership in the disability community. He describes this as society's evolution from paternalism to self-actualization.

Applying the notion of a consumer orientation to our task suggests a learner orientation to the development of leaders. And making learning accessible to learners means providing learner choices through alternative formats. One way to offer multiple delivery approaches is to cultivate multiple learning resources. This may include employers, educational programs, professional associations and accreditation organizations. Achieving access to multiple resources, in part, necessitates alliances. Not every training program addresses all of the managerial/leadership competencies, and some programs may have more training expertise in an area than others. Alliances among resources can address this need for providing the learner with options.

Suggestions for a unified approach

- Pursue coalitions beyond vocational rehabilitation. A limitation of the rehabilitation community is the tendency to be focused narrowly by funding stream. During the Symposium, John Durand encouraged expanding our vision as rehabilitation professionals to include all private and public sectors. Fred Menz advocated "congregational support" to promote and sustain the goals of individuals with disabilities regardless of the system through which their needs are expected to be met. Brian McMahon suggested that educational programs might pursue complementary coalitions, in and out of rehabilitation, which enable a team approach to addressing the many and varied needs of adult learners.
- Seek alliances among educational resources, including businesses and employers, for the purpose of collaborative effort. Examples might be joint development of courses, the integration of curriculums,

- and the use of each other's courses. Partnerships among programs can stretch limited resources, avoid duplication of effort, and increase the options available to learners.
- Create alliances for the purpose of delivering a curriculum that addresses all of the leadership/managerial competencies. This would seem to be a coordination function. Programs often focus on some of the leadership/managerial competencies rather than all. Relating individual program offerings to a more complete list of competencies can identify a wider range of educational offerings for learners, can identify gaps in available training, and can serve as a basis for planning cooperative efforts. Addressing gaps could also involve prioritizing the development of new courses by those interested in the competency area.
 - Ask the National Clearinghouse of Rehabilitation Training Materials to be a repository for maintaining Course Syllabi for all management/leadership development in an accessible format to learners and educators, e.g. on a Web site. This could be a starting point for cultivating a national effort.

Competencies

On the basis of a review of several managerial competency models, the RehabLeadership Project Advisory Council, with guidance from five national rehabilitation organizations, adopted the Leadership Effectiveness Framework (LEF) as a model for curricular development among collaborators in pursuing rehabilitation leadership development. The model identifies 22 competency areas within four levels, basic, supervisor, manager and executive. Rehabilitation leaders participating in a Symposium conducted on the Internet considered the LEF competencies as a viable curricular guide, but felt enhancements were needed. Thus, the 22 LEF competency areas have been expanded to 26 competency areas for rehabilitation leadership development.

Other rehabilitation programs use other models. For example, the CRP-RCEP at Georgia State University uses a model by Robert E. Quinn called "Competing Values Framework." The Rehabilitation Leadership Institute at Western Washington University uses the Transformational Approach by James Kouzes and Barry Posner. Goodwill Industries International is exploring the application of the LEADER-SHIP ARCHITECT® developed by Lominger Limited, Inc. (Michael M. Lombardo and Robert W. Eichinger).

Suggestions for a unified approach

- Adopt an approach to competency recognition, which is inclusive of various models. It is unlikely that programs will give up an approach, or model, that they have cultivated over time in favor of one approach which unifies efforts. Thus, when identifying competencies for a unified effort, consider an approach that allows the integration of leadership models.
- Use competencies as a guide for empowering learners to design their own program of development tailored by their prior education, experience, current position, and career direction. Be flexible in the application of competencies. They do not need to be considered as a hierarchy of skills, or acquired in a prescribed sequence, as suggested by the LEF model.
- Consider giving a high priority to developing leaders in the disability community and to involving consumer organizations in the unification effort.
- Give an educational priority to developing leaders when addressing competencies in curricula. Rehabilitation is thought to have an abundance of managers and a shortage of leaders. Address the differences between leadership skill and managerial skill. In rehabilitation the same person typically implements the roles of manager and leader and leadership is not related to organizational position.

Competency Achievement Recognition

A competency-based curriculum implies the measurement of competencies and most competency-based approaches include a measurement approach. The uses are many. Tim Kral, a Symposium participant, would use competency measures as part of the human resource management function of an organization, e.g. for hiring, promotion and development. Paul Dziedzic uses measures for self-awareness. Again however, it may be unrealistic to expect educators and employers to adopt an approach based on a single model. Unifying efforts should probably focus on a system of recognition, which can acknowledge differences in programs rather than expect all to agree to one tool.

Suggestion for a unified approach

- Adopt an approach to recognizing competency attainment which permits programs to select their own measures for competency measurement, e.g. the Leadership Effectiveness (LEF) Inventory, the Leadership Practices Inventory (Kouzes/Posner), the Competing Values Framework measures (Robert E. Quinn model), yet promotes unity. One possibility is to establish some standards for measurement and allow programs to “certify” competency achievement by learners.

The *Think Tank* Plan

The *Think Tank* during September 21-23, 1998 is probably best characterized as another step in the pursuit of a unified effort for developing rehabilitation leaders. The plan for the meeting is to consider the near future for rehabilitation, including the “high bridge,” to address the components of a unified plan for developing rehabilitation’s future leaders, and to identify strategies for implementing the plan. It is recognized, however, that assembling so much intellectual talent in one room could result in a change in the meeting’s plan early on - and that’s OK. The purpose of Fred’s thoughts and the 13 suggestions in this paper are to stimulate thinking. They are a place to start; hopefully, a thoughtful place. As facilitator, Norm Grunewald will skillfully guide us to a productive conclusion. The *Think Tank* will be considered a success if it moves us one step closer to a united effort, and the outcome is considered worthy of your significant investment of time and the RehabLeadership Project’s limited resources.

A listserv has been established to continue the effort following the *Think Tank*. The listserv becomes a convenient tool for “hammering out” details; thus, permitting our in-person session to be an opportunity for conceptualizing. So, come prepared to give it your best shot - and enjoy the experience.

Appendix G

Acronyms

Acronyms

ACCSES - American Congress of Community Supports and Employment Services

AECRP - Association for the Education of Community Rehabilitation Programs

APSE - Association of Persons in Supported Employment

ARCA - American Rehabilitation Counseling Association

CANAR - Consortia of Administrators for Native American Rehabilitation

CARF - Commission on Accreditation of Rehabilitation Facilities

CORE - Council on Rehabilitation Education

CORL - Corps of Rehabilitation Leaders

CRCC - Commission on Rehabilitation Counselor Certification

CRP-RCEP - Community Rehabilitation Program-Regional Continuing Education Program

CSAVR - Council of State Administrators of Vocational Rehabilitation

GSA - General Services Administration

ILC - Independent Living Center

ILR - Independent Living Rehabilitation

ILRU - Independent Living Research Utilization

IRI - Institute on Rehabilitation Issues

JRA - Journal of Rehabilitation Administration

NCHRTM - National Clearinghouse of Rehabilitation Training Materials

(NCHRTM) RRC - Rehabilitation Recruitment Center

NCRE - National Council on Rehabilitation Education

NIDRR - National Institute on Disability Rehabilitation and Research

NISH - (formerly National Industries for the Severely Handicapped)

NRLR - National Rehabilitation Leadership Resource

NRA - National Rehabilitation Association

NRC - National Results Council

NRCA - National Rehabilitation Counseling Association

NRAA - National Rehabilitation Administration Association (of NRA)

OSERS - Office of Special Education and Rehabilitation Services

RRCEP - Regional Rehabilitation Continuing Education Program

RSA - Rehabilitation Services Administration

SCORE - Service Corps of Retired Executives (Small Business Administration)

SILC - State Independent Living Council

VCU - Virginia Commonwealth University

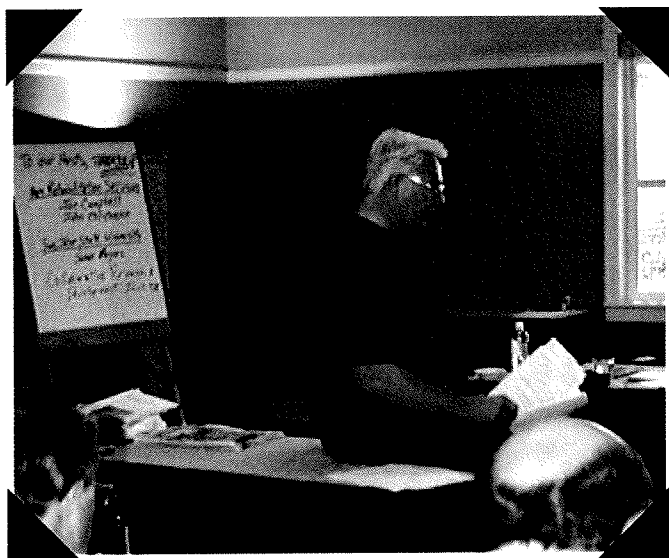
Appendix H

NRLR *Think Tank*
Photograph Album

Antony Grasso
Photographer



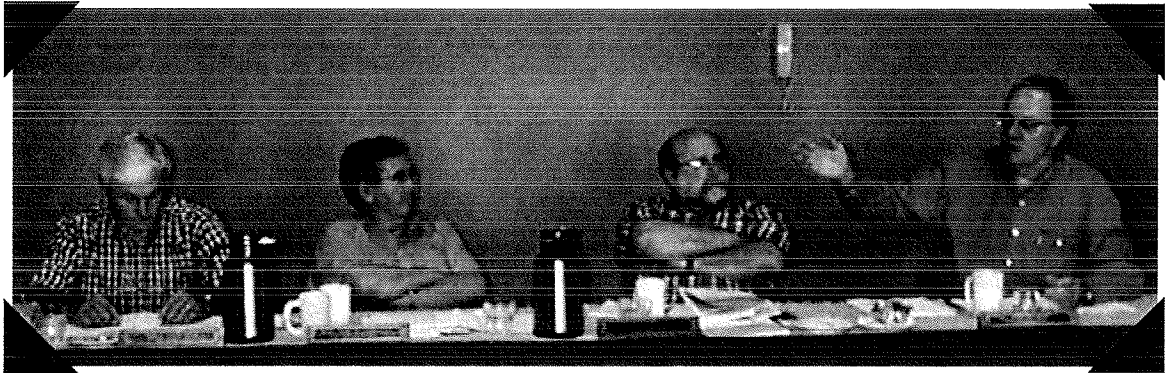
Think Tank participants meet in the Seascape Room at the Chaminade Executive Conference Center



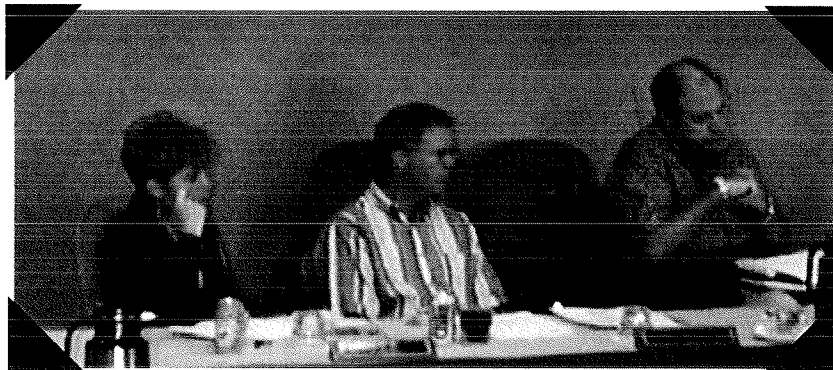
Norman Grunewald, *Think Tank* facilitator, keeps the meeting on track

Margaret Glenn (front), Don Galvin and Laurie Ford listen intently

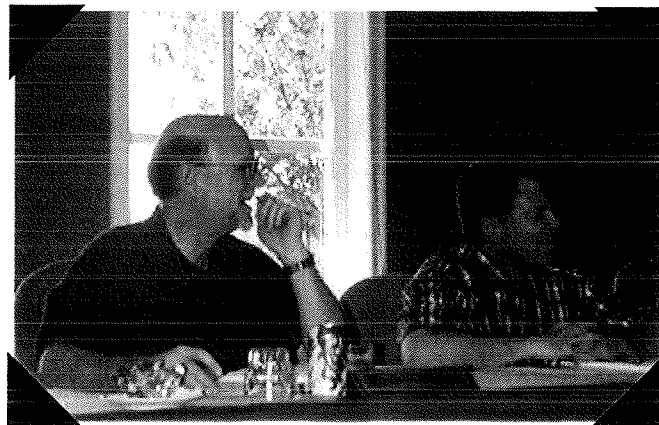




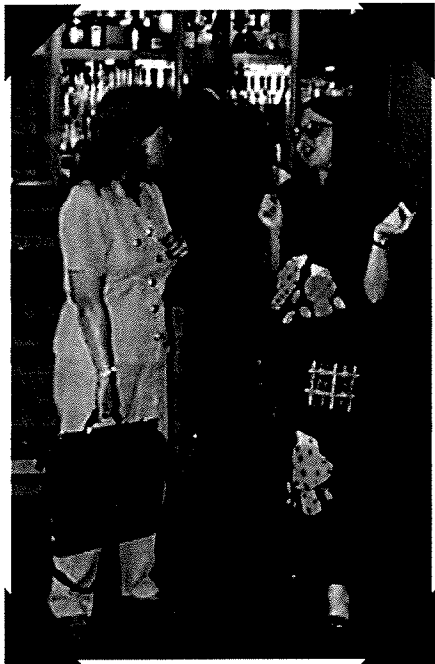
Mike Carney (left), Joe Campbell and David Brooks listen on as Jim Bitter shares a thought



Margaret Dempsey, Bob Daniels and Mike Collins listen as a contribution is made by another participant



Ron Wisecarver and Gary Hudson share in a lighthearted moment



Susan Meyers (left) and Deborah Atkinson converse at the social



Jeanne Miller and David Brooks in conversation



Laurie Ford and Joe Campbell make introductions



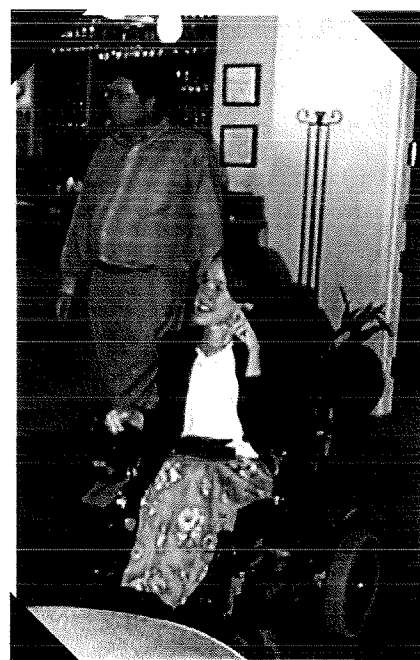
Fred Menz makes a point to Mike Carney



Laurie Ford (left), David Brooks, and Ron and Terri Wisecarver share in conversation

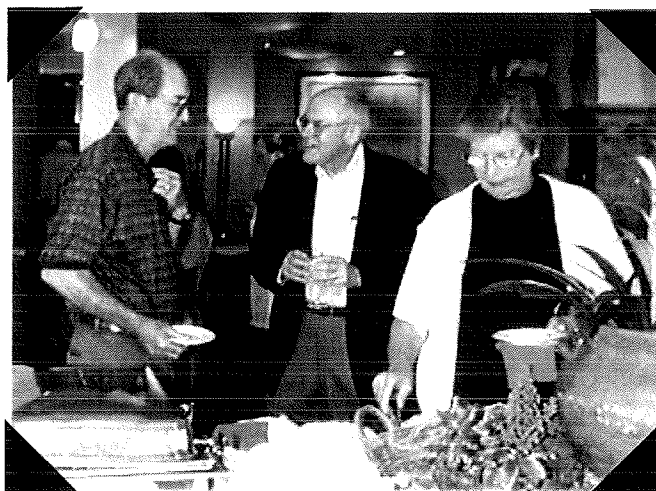


Jeanne Miller and Mike Collins exchange views

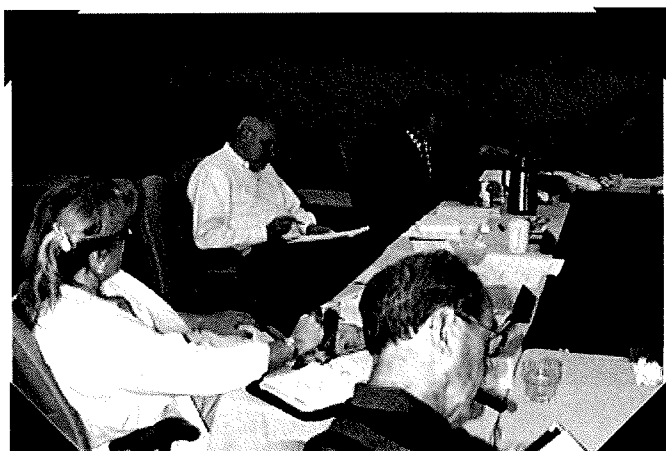


Jessica Milligan, a nominee for the Paul G. Hearne Leadership Award for People with Disabilities, is introduced by John Christensen

Peter Griswold (left) talks with Don Galvin as Sue Griswold samples the appetizers



Gary Hudson stresses a point as
Jeanne Miller looks on



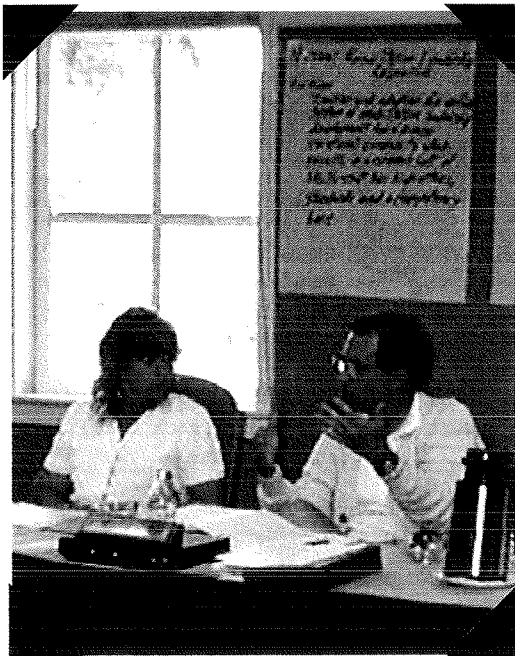
Pete Griswold (front right), Mar-
garet Glenn, Don Galvin, Laurie
Ford and Margaret Dempsey
participate in the meeting

Don Galvin (foreground) makes
notes as others listen





Peter Griswold (right) shares a thought as Dick Oestreich (center) and Fred Menz contemplate



Fred Menz receives the full attention of Susan Meyers



Deborah Atkinson uses a visual aid to demonstrate a leadership topic



Bob Daniels (foreground) takes part in the *Think Tank*

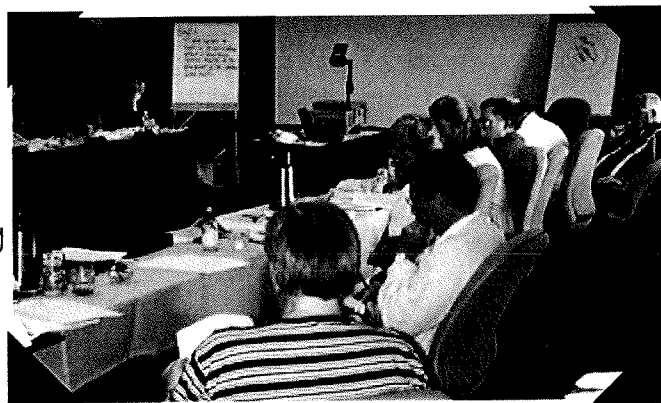


Joe Campbell (far right) enlightens fellow participants (left to right) Mike Collins, John Christensen and Mike Carney

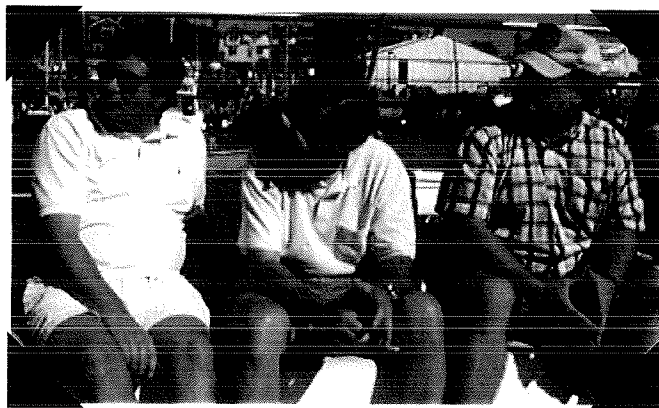


Participants listen intently

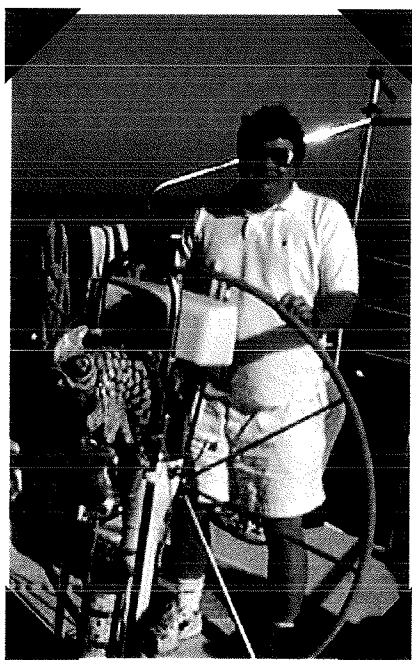
A lighthearted moment is enjoyed by Susan Meyers (center)



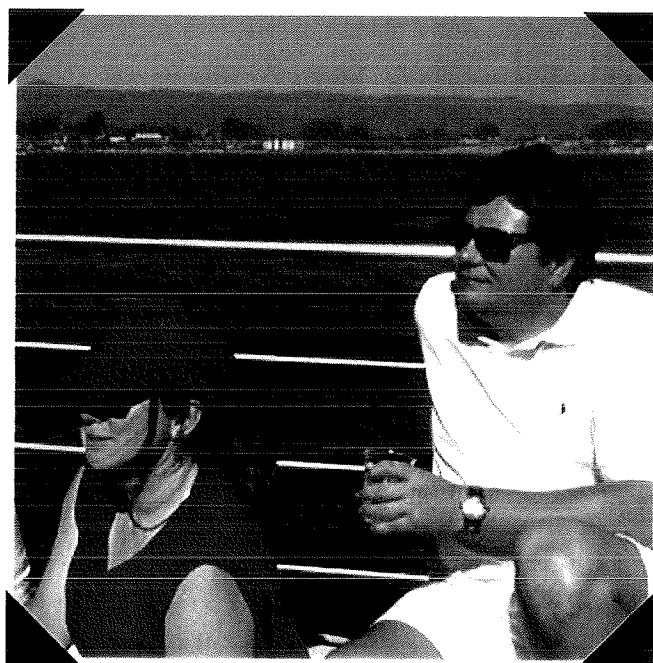
Susan Meyers uses hand gestures to emphasize her point



John Christensen, Fred Menz and Dave Brooks
prepare for a sailing departure



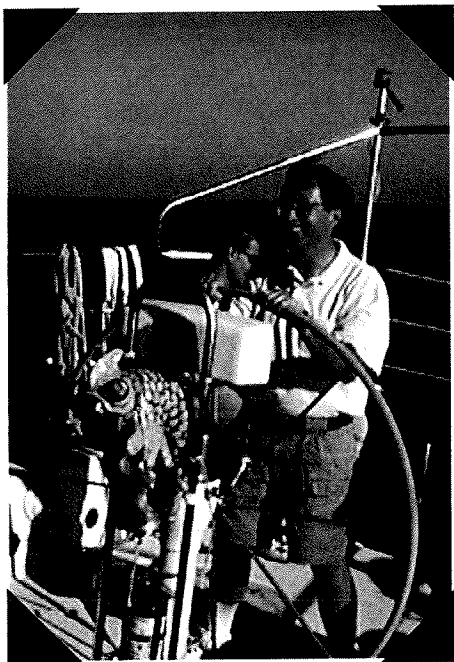
John Christensen demon-
strates his leadership ability
by taking charge of the
wheel



Deborah Atkinson and John Christensen enjoy
the afternoon sail



Jim Bitter and John and Valerie Christensen
delight in the sailboat ride



Fred Menz takes a turn at the
helm



The motley crew

