

Summary Report

Survey: P&A Leadership Institute Survey

1. What do you know now about leadership that you wish you had known when you first started out?

Count	Response
1	How to balance being sensitive to others with developing a 'thick skin'.
1	The Knowledge of the locals law that guarantee the rights of people with disabilities
1	If you are doing your job well, most people will like you. If you are doing your job well, some people won't like you. And it is essential to have a good sense of humor.
1	In no particular order - still a work in progress Tone from the top matters. Sensitivity to messaging, recognition that reactions of others will be exaggerated because of roles. There are lots of folks out there to help, use them (peers, certainly, but also organizational consultants, executive coaches). You can't be in control of what others think of you, but you can be in control of what you do and how you act. Being true to your personal style matters but with 2 caveats: first, you really need to understand what that is (see executive coaches); and second work at being aware and staying in balance, especially on those days when it's not going well! Sondheim, Move On: "Anything you do, Let it come from you, Then it will be new, Give us more to see..." Unreal or undefined personal expectations. Transitions are difficult to manage, but founding successor transitions are particularly difficult, especially for promotion from within. From Wicked: "Cause getting your dreams, It's strange, but it seems, A little - well - complicated. There's a kind of a sort of a cost. There's a couple of things get: lost. There are bridges you cross You didn't know you crossed Until you've crossed." The value of collaborative leadership. Having a strong team (put the energy at the hire stage, not at the other end), learn how to delegate, give feedback. Work with the board to have clear communication and expectations. This challenge is most profound in areas where the CEO was / is a subject matter expert, and particularly for lawyers, I think, where a linear deadline driven work rhythm is replaced with a more global longitudinal one. External relations are paramount.
1	Leadership is situational and there is no one way of doing things. What works well with one group in one location may not be the work with another group because of a whole array of differences in organizational culture, quality of personnel, recent history of employee relations, etc. It is not all about the employees and addressing their concerns. It is possible to focus too much on employee concerns at the expense of the people you serve. There is a balance and part of leadership is helping the organization find that balance and creating an environment where people accept that is not all about them and are able to contribute in a productive and functional manner toward the organization's mission.
1	How to recognize and handle personnel issues early on. The importance of fiscal integrity. Recognizing the difference and inter-relationship between Management and Leadership. Adjusting Exec's role in relationship to the skill sets of the volunteer leadership. The importance of the Nominating Committee Having a skilled and well functioning Board of Directors
1	The breadth of fiscal requirements and variances among the funding sources Rapid changes in Congressional and programmatic mandates Media management and effective networking Handling the "guttersnipes"
1	Here's what I think is important, i would like to think i had some of these skills when i started... i do know these are important Have a vision about where you want to go; engage your staff about the vision and implement the vision in manageable pieces--change is hard and needs to be effectively managed. Be credible, do what you say you will do. staff, constituents, your board notices Listen, be flexible and don't think you are the one with all of the answers.
1	one has to be simultaneously selfish & selfless. selfless, as in willing to outwork all opponents, and to include people whose voices are not heard. selfish, as in sticking to priorities that are informed by good strategic thinking.

Count	Response
1	As the leader of an organization, you can't do everything. You need to rely more on your staff and delegate tasks. Allow staff the ability to complete the task without interfering in their abilities.
1	Finding a balance between doing many things myself and delegating them to others; being aware of how even my most offhand remarks or behavior may be (mis)interpreted; how to establish genuine relationships with staff members while maintaining boundaries needed because of my role as ED.
1	That everything you do - and don't do - when you're the CEO communicates values and norms to employees, whether you're aware of it or not.
1	That almost everything you do and say can be used as an opportunity to communicate the philosophical underpinnings of the P&A That communication is always key to everything you want to accomplish in your organization - whether it is a structural reorganization, a programmatic direction or redirection, or simply the priorities of the agency. That the best outreach strategy is success. The P&As successes speak for themselves and convince people of the necessity of having and supporting this type of agency
1	The difficulty in addressing personnel issues Better supervision techniques addressing stress levels in staff aligning different personalities into a team effort
1	That being a good 'boss' does not necessarily translate to being an effective leader. To be an effective leader, an individual requires both long and short term vision and the ability to listen - to stakeholders all along the way. I learned a while ago, that there are directors, managers and leaders. you have to know when to be directive and tell staff what to do, other times you manage their work to help them get to their goal and sometimes you are asking for their trust in following you. An effective leader understands those different roles and adapts to situations. I have know people who basically just say follow me and never look back, leaving staff behind. I have also know folks who just tell people what to do (directors) which does nothing to help their staff grow. There is a delicate balance to problem solving and contingency planning and maintaining trust. I had to take an Emotional Intelligence test to get this position. I scored high on problem solving which is what was needed at the time I took the job. But I was also counseled to slow down and remember that to solve the problem I needed to consider the feelings of the people involved. This has helped me a great deal in 'leading' the new (now 7 yrs old) P&A in NC. That to be a leader, I had to be accepted and trusted by the staff who were absolutely necessary to go where I wanted to go.
1	The significant time and attention that must be given to personnel-related matters and the sensitivity that all such matters require. Relatedly, the importance of acquiring personnel/employee/human resource management knowledge and skills.

2. What do you see as the most important aspects of leadership that you would like to develop to in the Institute?

Count	Response
1	Managing people
1	That people must know how to claim in an effective way their rights
1	Executive coaching, strategic leadership (especially necessary for larger more complex programs) Fiscal awareness, both federal grant and IRS mandates Developing Quality assurance mechanisms, systems to measure effectiveness and trouble shoot problems, including fiscal Development leadership, ambassador culture, developing relationships Global understanding of disability culture, especially burgeoning self advocacy movement
1	Looking at the big picture. Where do you want your organization to be in three, five or seven years? While planning your vision, do not lose the values and vision of the protection and advocacy system.
1	That being a leader is more than just checking things off on a to-do list. That effective leaders win the respect of their staff). That leadership comes down to mutual trust on a variety of issues including follow

Count	Response
	through, truth telling, honest evaluations, and accountability. So a good leader knows the work, has credibility and doesn't keep secrets or surprises their followers (staff).
1	Focus on leadership not management--they are different. I think lots of middle managers (and no doubt others) think leadership and management are the same. Good leaders have good management skills. But good management doesn't mean you are an effective leader
1	The skills to be innovative, change-oriented and flexible; Keep the organization fresh and vital, yet maintain the mission integrity. I think these qualities promote growth, development, and relevance to the community.
1	Mindfulness. By that I mean that people who are or who want to be leaders must be mindful of how their actions and words affect others. Ethics. By that I mean that a leader must be ever careful to operate at the highest level of honesty, fairness, and transparency. Hard work. A leader must be willing to put out at least as much - and usually more - than the hardest worker on the staff
1	Clear understanding that there are (at least) two parts of the CEO Job: 1. Management of operations 2. the Face of the organization and a credible leadership voice in the disability movement You can't do the second one unless the first one is handled correctly.
1	Professionalism, vision, attention to details, learning how to adapt your leadership to the needs of the person being led.
1	Flexibility, vision, understanding and juggling multiple aspects of agency management; inspiring others to be committed to a common vision and to work toward it.
1	Matching people to the right job and figuring out my role in making them successful based on the skills and expertise they bring to the organization. Making people play nice - working collaboratively both internally and externally.
1	VISION - what is it and how do you develop it if you don't have it.... Effective communication. Clarity with expectations from others.
1	development of young leaders in the P&A network. the CPR protocol is the best such effort I have seen on its subject. Our goal should be to do as well for this subject.
1	Fiscal management and requirements of funding sources, including variances among them Ethical requirements and conflicts of interest Case management and organizing and maintaining case files Public relations, including working with Boards, Councils, the Legislature, state officials, and the public Media relations

3. How do you support leadership development in your P&A now?

Count	Response
1	Find out what people's goals are and when appropriate helping them to achieve those goals.
1	N/A. I am not in a P&A
1	Offer training and resources to Managers.
1	Offering seminars so they can understand the rights they have
1	work especially closely w/2 substantive team leaders, and other members of management team.
1	By promoting people when possible By recognizing talent and always giving people opportunities to work at their highest level By expecting excellence from everyone on staff By communicating and acknowledging success
1	Delegation of responsibility to lead specific teams, projects, and efforts to those with potential and interest.

Count	Response
	Educating all managers about board, budget, and PPRS.
1	Ongoing staff training, including formal and informal training on management issues Webinars, CLEs, and other training opportunities Promoting staff to higher levels of responsibility Weekly case meetings Publications such as review of HR publications and related topics Ongoing training on fiscal requirements and expectations of staff
1	Probably not as well as I should. Giving my colleagues opportunities to be in charge--not micro-managing--asking for volunteers to manage different aspects of the agency (that includes advocates, admin staff, etc.)
1	Delegation of important leadership roles Exposure to board, funders, national and local leaders Training and shared experience in all aspects, including organization development
1	One way: We are committed to sending 2 staff each year to the One Justice Leadership Training (full year training). We are then doing monthly meetings with graduates and participants in the training and working with them to identify leadership opportunities, mentor them around those opportunities. It is one way I am working to identify the next generation of leaders and promote them within the organization.
1	Trying to promote from with-in. Giving Management staff an opportunity to learn the varying responsibilities of Leadership.
1	Provide opportunities to lead projects, get internal and external visibility for work done. Give time and room to develop new interests. But promotion into "higher" positions is a challenge in a small agency with rare turnover in leadership positions.
1	We have 5 directors that I supervise (Legal Services, Program & Operations, and Program Services (2)) that make up the Management Team. We meet consistently (usually weekly) and address issues and ideas as a group. I believe this is helpful in promoting leadership as (especially newer) directors are engaged in the decision-making process and how things are decided is more transparent to them. They learn that input from others is (usually) very positive. It promotes listening, overall communication skills, and buy-in as well as responsibility in following up on assignments. We have an Issue Team for each of our agency priorities (of which there are seven). Each Issue Team is composed of 3-4 members (advocates, attorneys, and directors). The Issue Team is responsible for developing a work plan composed of strategies that will help the agency reach its target goals and objectives. The Issue Teams meet to track & report progress throughout the year. The Issue Teams each have a leader that is a Disability Advocate. The 7 Issue Team leaders make up the Leadership Team. I facilitated the work of the group for a number of years but this role has been re-assigned to the 2 Directors of Program Services. The Leadership Team meets approx. quarterly. The members take turns providing 'leadership lessons' to the rest of the group. These are often fun and creative exercises as well as good learning experiences. We use a team and committee process for many projects. Staff from all roles, including support staff, participate on at least one of these and are often in the role of being the team or committee leader.
1	I like to think we do this. I share information with leaders on staff who have a great deal of autonomy with the companion responsibility - we have a monthly meeting of supervisors where we go over the budget and spending, etc. We call this our Resource Efficiency Engagement group. REM looks at spending, the service requests coming in, predictions of future costs, etc. Now we will begin looking at job descriptions, performance assessments and their relationships to quality assurance..
1	Provide varied work opportunities access to training and conferences assigning lead on certain projects

4. Does the Leadership Institute appear to be structured to support your efforts?

Value	Count	Percent
Yes	15	93.8%
No	1	6.3%

Statistics

Total Responses

16

5. At this time, do you have additional ideas for this program can be made more useful to you in the future? We will ask you this question again.

Value	Count	Percent
Yes	2	12.5%
No	14	87.5%

Statistics

Total Responses

16

6. Given the length of our sessions, we may have to emphasize some learning objectives over others. Please rank the learning objectives in order of importance to you below with 1 being the most important and 4 being the least important.

Session I - Vision and Personal Characteristics of Leaders

Learning Objectives - At the conclusion of this section, participants should be able to:

Item	Total Score	Overall Rank
Identify strategies to maximize resources and tolerate uncertainty;	28%	1
Understand how to communicate organizational vision and use it as a guide for decision-making;	26%	2
Increase understanding of how to integrate P&A values and principles into the daily work of the P&A.	26%	3
Name personal characteristics of effective leaders; and	20%	4

Session II – Working with and Leading People Within the Organization

Learning Objectives - At the conclusion of this section, participants should be able to:

Item	Total Score	Overall Rank
Name strategies to promote high quality work and accountability.	36%	1

Item	Total Score	Overall Rank
Identify key aspects of effective supervision and methods to motivate others; and	34%	2
Understand how to spot and support leadership across the agency;	30%	3

Session III – Working with and Leading People Outside the Organization

Learning Objectives - At the conclusion of this section, participants should be able to:

Item	Total Score	Overall Rank
Identify roles and responsibilities of Board of Directors and strategies to support Board engagement;	28%	1
Ascertain community expectations of P&A from disability and other communities and strategies for managing these expectations; and	26%	2
Involve community partners in achieving shared goals;	24%	3
Recognize opportunities to leverage potential shared resources and build effective coalitions.	22%	4

Session IV –Leadership Style Boot Camp – June 2 or 3, 2014 – 9: 00 am – 5:00 pm – On-Site

Full Day Institute at the NDRN P&A/CAP Annual Conference in Baltimore, MD.

Learning Objectives: At the conclusion of this section, participants should be able to:

Item	Total Score ¹	Overall Rank
Put leadership ideas into practice through a series of scenarios facing P&A leaders today and in the future.	37%	1
Identify individual leadership style;	33%	2
Deepen understanding and commitment to disability community and P&A agencies; and	30%	3

Session V – Maximizing Client Services

Learning Objectives: At the conclusion of this section, participants should be able to:

Item	Total Score ¹	Overall Rank
Identify methods to monitor and evaluate program outcomes and use them to modify activities; and	27%	1
Understand how to ensure zealous advocacy across diverse communities;	20%	2
Recognize systems necessary to manage advocacy;	19%	3
Appreciate challenges of managing legal agency as a non-attorney or an attorney depending on the background of the leader.	18%	4
Identify P&A continuum of remedies;	16%	5

Session VI – Understanding the Finances

Learning Objectives: At the conclusion of this section, participants should be able to:

Item	Total Score ¹	Overall Rank
Understand how to read financial statements and audits;	26%	1
Identify methods to project and troubleshoot future financial picture; and	21%	2
Name source of federal P&A funds and develop initial understanding of rules that govern their spending;	19%	3
Recognize strategies to diversity P&A funding.	17%	4
Create P&A budget;	17%	5

7. Other comments

Count	Response
1	Love to help in any way.
1	Thanks for doing this/
1	Thank you for this opportunity and for creating the Leadership Institute. We look forward to participation in the future.
1	Long-term and short term strategies to address the needs of people with disabilities need to be understood. Outcome measurements as opposed to activity reports need clarity. (Differences between for profit and non-profit outcome measurements) Board/CEO relationship really seems to be missing in this curriculum.
1	some of these were difficult to score. For larger programs, evaluating systems, developing strategies should have the highest priority regardless of the context. Less complex entities will need more hands on management training, I think.
1	Quote from Curt Decker that I have written on a sticky note on my desk: " You have the right to expect certain productivity levels. You need strong managers." I don't recall when he said this (probably one of our CEO meetings many years ago), but it gave me more confidence in working with staff within the agency.

