

National Leadership Consortium Bulletin

Looking Ahead and
Developing Leadership
from Within

The National Leadership
Consortium | on Developmental
Disabilities



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National Leadership Consortium **Bulletin**

About the Bulletin

The National Leadership Consortium Bulletin is a free, web-based publication dedicated to providing relevant, trustworthy, and thought-provoking information to leaders, practitioners, and people with disabilities and their families involved in the field of developmental disabilities support services. The Bulletin will serve as a bridge between scientific journals and day-to-day leadership, exploring timely research and policy issues in the leadership and disabilities fields with the aim of promoting organizational change and assisting leaders to support people with disabilities to experience inclusive, valuable, and meaningful lives.

About the National Leadership Consortium

Leadership, Values and Vision: Transforming Lives and Organizations

The National Leadership Consortium was founded in 2006 to develop current and future generations of disability sector leaders to have the knowledge, skills, and values needed to transform services and systems to be responsive to the needs, wants, and rights of people with disabilities. Our mission is to provide quality training, technical assistance, and support aimed at the development of values-based leadership in disability sector leaders. The National Leadership Consortium is focused on promoting the rights of people with disabilities to direct their services and lives and to fully belong in their chosen communities. One way the National Leadership Consortium works to meet this mission is through a nationally recognized, intensive leadership development program, the Leadership Institute. These in-person or virtual trainings focus on knowledge, skills, and supports leaders need to transform systems and organizations in the disability service sector.

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If you would like to contribute a reflection, strategy, position piece, or research to the Bulletin please contact us at bulletin@natleadership.org. Even if you have not written for publication before, the team at the Bulletin would love to help you develop your ideas.

Why the Bulletin?

You may wonder why The National Leadership Consortium is creating the Bulletin. Well, throughout my career I have been fortunate to be in jobs where I had both access to a variety of information sources on policy and programs and time to review it. That information has not only educated me but has inspired and broadened my perspectives as a practicing professional. We know that for many leaders this is not the norm.

Most of the people who participate in a National Leadership Consortium training are extremely busy, both in their work and personal lives. Because of their time commitments, they aren't able to read publications that may assist them in their professional roles.

Additionally, journals in many fields are increasingly published by a shrinking pool of for-profit publishers and are behind a paywall, making them not terribly accessible to people without a subscription to the journal or those not at a university that allows access. You can't really measure the utility of an article without paying for it, so many practicing professionals don't regularly read journals, government monographs, or publications from universities, think tanks, and advocacy organizations.

With this new bulletin, we are hoping to provide information on current best practices and research that allow practitioners at all levels of an organization to easily access useful information that will contribute to their work. We aim to give practitioners information in a usable format that is linked to documents and resources that are in the public domain or that we have permission to release. We will also solicit and share articles from Leadership Institute alumni who are demonstrating real-world leading-edge practices, strategies, and accomplishments.

We hope to publish this bulletin three-to-four times a year and will have past issues readily available on our website.

We welcome your comments, critiques, feedback, and ideas that would turn this effort into something very useful in our joint efforts to include people with developmental disabilities in everyday life in their community.

Thanks for reading,

Steven M. Eidelman

Steven M. Eidelman MBA, MSW, is the Faculty Director and liaison between the National Leadership Consortium and the University of Delaware. Steven is also the H. Rodney Sharp Professor of Human Services Policy and Leadership at the University of Delaware. He is a past President of AAIDD, serves as Senior Advisor to the Chairman of Special Olympics International and serves as the Executive Director of The Joseph P. Kennedy, Jr. Foundation. Contact Steven at sme@udel.edu.



Introduction: Looking Ahead and Developing Leadership from Within

During a recent discussion at a Leadership Institute, we asked what participants expected to get out of the week. Many attendees shared things like learning more about the field, collaborating with others, working on their professional development, etc. Towards the end, one participant shared he was there to invest in his leadership but also to take back information and exercises to develop his staff. Although we know that development of employees is one of the best ways to keep employees engaged, it is not always prioritized. How often do we think about our own development and our own leadership but forget those around us or who report to us? In his book *Good to Great*, Jim Collins advises to “get the right people on the bus, the wrong people off the bus, and then get the right people in the right seats on the bus.” What are you as a leader doing to get those right people in the right seats? How are you supporting them to have the right tools for their current positions but also the skills needed for the future?

In this Issue of the Bulletin, we will be examining the strategies that leaders are using and can use to *Look Ahead and Develop Leaders from Within*. In her article *Leadership Begins at Home*, Nancy Weiss, Co-Founder of the National Leadership Consortium, argues that it is our responsibility as leaders to develop other leaders. She will share some tips for developing leaders from within and discuss why this is key to success. Amanda Rich will share ways that leaders and organizations that serve people with IDD are including and developing people who use their services throughout the organization. *“Nothing About Us Without Us”: Including People with Intellectual and Developmental Disabilities Who Use Services in Succession Planning and Executive Hiring* examines ways that we can more meaningfully ensure that people who use services have their voices heard in major organizational decisions.

Research shows that developing that next generation of leaders is essential for the sustainability and continued forward movement and progress of the disability service sector. In *Succession Planning: Essential for Leaders in Our Field*, Caitlin Bailey draws connections between what the research shows and how this impacts our field and our organizations. These connections can also be seen throughout the interview with management consultant Elizabeth Vasquez, on *Organizational Change and the Impact of Employee Development*. Investment in leadership across an organization has been shown time and time again to increase positive outcomes for the organization, customers, and employees. We have seen many organizations prioritize the development of their employees and offer better outcomes for people who use their services and supports as a result. In our Innovation Spotlight, *Leading through a Workforce Crisis: Developing DSP Leadership*, Shawn Kros, Executive Director of The Arc North Chesapeake Region, shares how they are investing in their direct support professional development and the positive impact it is having on their services and organization. Lastly, in *Benefits of Developing from Within* by Cory Gilden, we examine the research on the many benefits of prioritizing development of our current workforce and the positive outcomes from that investment. By the end of this Issue, we hope you feel more informed of ways to ensure that you have the right people on the bus and feel more confident about investing in their development to ensure they are in the right seats.

Happy Reading,

Kristen Loomis

Kristen Loomis is the Co-Director of the National Leadership Consortium. She received her Bachelor of Science degree in Human Services from the University of Delaware and is currently working towards her Master's in Business Administration with a concentration in Strategic Leadership. Contact Kristen at kloomis@natleadership.org.



Leadership Begins at Home

By Nancy Weiss

I have no doubt that there is a need for leadership development in all fields of work – but back when we started the National Leadership Consortium on Developmental Disabilities in 2006, it was apparent to Steve Eidelman and me that a focus on leadership was particularly important, but lacking, in our field, developmental disability services. No other program existed then (or does now) that focused on this complex line of work or its wide range of challenges. A leadership program that both provided needed knowledge *and* had a strong focus on values would be essential.

With the persistent staffing shortages in the disabilities field and lack of required certifications or training, employees often accelerate through levels within an organization quickly and without support for new management and leadership responsibilities. I started my work in this field as a direct support professional (well before that term was used and, in my case, the use of the word ‘professional’ at that time would surely have been a stretch). Within months I was a house manager, and long before I had the requisite skills, I was supervising people and managing residential services. Like many people in the field, I figured it out as I went along, but I had very little formal training or helpful supervision to clarify my values or acquire the range of competencies needed to handle such a complex job. Without intentional leadership development, services simply plod along and we just keep doing what we’ve always done, often to the detriment of the people with disabilities and families we support. True leadership involves not only making sure what has always been done is “done right” but ensuring that the organization and all in it are “doing the right thing.” This means that organizations with strong leadership are continually evolving.



Though there has been progress moving people from large congregate settings, if you look at the services that many adults with developmental disabilities receive today, they are not that much different than what were provided in the first group home where I worked way back in 1976. What other field would tolerate such a lack of forward movement over 45 years? The way people communicate today virtually through email, text, video conferencing and social media could not even have been conceived of 45 years ago, yet, I have a feeling that if one of the men who lived in my first group home was plopped down into a group home today, life for him would be eerily and sadly familiar.

Military leader Napoleon Bonaparte famously said, “A leader is a dealer in hope.” Our field desperately needs hope. I imagine a day when we will look back at the ways we controlled, limited, isolated, and underestimated people, even with the best of intentions, with appropriate dismay. Hope and change are the stock-in-trade of leadership.

Over much of my career, I was caught up with the day-to-day tasks of running an organization. I could spend all of my time managing and putting out brush fires, leaving little opportunity or energy for leadership. Being a manager was comfortable for me – I knew how to put one foot in front of the other and get the work done. What I was missing, what we knew was missing for many leaders when we started the National Leadership Consortium, was the ability to get out from under the day-to-day demands in order to create a vision and inspire others to get on the path toward a better future for the people choosing to receive supports from our organizations. Without leaders to inspire a new reality, we risk continuing to offer services that have evolved only incrementally over the last half century.

Being a leader comes with it a range of obligations – the most important of these is the responsibility to grow other leaders. We owe it to people who work at all levels within our organizations to provide opportunities for their growth. Giving people the chance to develop as leaders is good for them personally, good for the organization as a whole, and ultimately, good for the people our organizations support. When instead of growing leaders from within you choose to look *externally* for new leadership, you deny people the opportunity to grow, risk diminishing employee engagement, and ignore one of your most important resources.

Some tips for developing leaders from within include:

- **Identify leadership potential:** Think broadly about the kinds of backgrounds, skills, and talents that various employees may bring to a leadership role. Just as there is no ‘one way’ to be a leader, you sell both your employees and the organization short if you have an overly prescribed view of what kind of person could become a great leader.
- **Be intentional about providing support:** You cannot expect people to simply pick up the knowledge, skills and values needed to become an effective leader; nor is there one path or one kind of training that will meet all employees’ needs. Develop a responsive, flexible, yet focused leadership development program that will give people their best opportunity for becoming the kind of leader from which your organization will benefit.
- **Offer support and firsthand experiences:** A major advantage of growing leaders from within, both for the organization and the leadership trainees, is that they can try out various roles, gradually take on a range of responsibilities, become involved in progressively higher-level work, and benefit from observing respected organizational leaders as they perform their duties. The ability to provide real-time coaching and on-the-job development is an advantage that comes only through developing leaders from inside your organization.
- **Teach the skills that *you* found most useful:** Think about the competencies that have contributed importantly to your success and share these with leaders you are developing. Whether these are areas of expertise such as financial planning or more general skills such as network building, an advantage of developing internal leaders is that you have the time to coach, guide and share your knowledge and values with them.
- **Provide opportunities for trainees to teach you:** The leaders you are developing have watched your organization operate and may be in the best position to suggest efficiencies, point out areas of needed focus, and contribute innovative solutions. Embrace the changes they bring and foster their creativity and talents.

Nancy Weiss is a founder and a faculty member of the National Leadership Consortium and a recently retired professor at the University of Delaware. Nancy has more than 40 years of experience in the disabilities field and has worked relentlessly to end the use of aversive procedures and promote supports and policies that inspire inclusive communities and the rights of people with disabilities. Contact Nancy at nancyrobinweiss@gmail.com.



The Benefits of Developing Leaders From Within

By Cory Gilden

What Does the Research Say?

When looking for new executives, many organizations hire based on leadership experience, often turning to outside candidates. However, research shows that developing and promoting from within an organization instead can save resources and avoid interrupting an organization's rhythm. Harvard Business School researchers found that [hiring from within is less disruptive](#) as "similar people working in similar ways at the same company will produce similar results." Existing employees are likely to have a stronger understanding and more buy in to the values and mission of the organization. This may be particularly pertinent in the disabilities service sector where it is important that leaders' values about the rights of people with disabilities and commitment to enhancing inclusion and self determination for people are aligned with the mission and vision of their organizations. Promoting from within may ensure that people are already connected to the values and mission of their organizations. Further, a recent [article by the Harvard Business Review](#) showed that outside candidates are paid more than internally promoted candidates for leadership positions. Methodically grooming internal candidates for leadership positions can also [save the organization money](#) and resources in the event of a sudden leadership departure, since organizations that scramble to find replacements can suffer financially and in delivering their services during a long or unexpected leadership transition.



[Research in 2020 by SpencerStuart](#) leadership consultants showed that hiring an external candidate with previous leadership experience from another organization did not often produce as successful results as hiring someone from within who did not rely on preexisting mental models (having preset notions on how to do things). Learning from scratch as a new leader was found to be more conducive to learning agility and out-of-the-box thinking. In addition to underperformance, [a study by the Wharton School of Business](#) also found that hiring outsiders comes at the cost of higher exit rates, with a higher chance of the new leader leaving sooner. There is also no assurance that an external candidate will match the culture and values of the organization as well as a current employee does.

What Does It Mean for Our Field?

[Research about succession planning](#) for nonprofits encourages organizations to transition from traditional "replacement-succession planning" to a more comprehensive "succession management" approach. While succession replacement focuses on finding a well-qualified replacement for a particular position in an organization, succession management is a more [formal, ongoing, holistic, strategic, systematic, and consistent approach to building a reliable supply of talent throughout an organization](#). Succession management culture focuses on developing leaders with strengths and experiences that match the organization's mission and values. Nonprofits may have to address conditions that [research](#)

[has found](#) to be challenging to succession planning, such as perceived difficulty to replace skill sets of long-standing executives, desire to maintain the equilibrium of present operations, and having several different locations, which can vary dynamics of operations dramatically. Agencies providing support and/or advocacy efforts for people with disabilities also need to consider representation of the people they support and have the added task of incorporating plans to [mentor and promote leaders with disabilities](#) from within their organizations.

What Can I Do?

No leader will stay at an organization forever—eventually they will leave or retire. A smooth transition of leadership from within often requires years of preparation, not weeks or even months. Organizations wanting to maintain their performance during a leadership transition should implement a succession management strategy long before they suspect it will be needed. Here are some helpful suggestions supported by research to get started:

- Studies have shown that [developing and communicating career paths within the organization](#) can greatly aid leadership changes.
- [Creating executive development programs](#) that systematically groom employees for leadership positions and offering opportunities to gain experience with leadership roles and tasks has been found to be beneficial to organizations in the long run.
- Consistently and critically evaluating succession planning progress is also helpful to improve strategy and effectiveness, according to the [Succession Planning Guide of the National Institutes of Health Office of Human Resources](#).

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Leading through a Workforce Crisis: Developing DSP Leadership

By Shawn Kros

The culture at The Arc Northern Chesapeake Region (The Arc NCR) has been to be person centered, progressive, and do things people thought could never be done. The organization was established in 1953 in response to parents wanting something radically different for their children than what society was offering. In this spirit, we are now in partnership with National Alliance of Direct Support Professionals (NADSP) and are committed to the quote by its ideological founder, John F. Kennedy Jr.: “Quality is defined at the point of interaction between the staff member and the individual with a disability.” We knew that the quality of supports we provided was determined by the quality of our front-line team members, but it wasn’t until we committed concerted effort to strengthening those team members that we saw changes in our employment trends. Over the years our staff retention rate was “average” for the field, meaning it fluctuated from 45-55% retention of our Direct Support Professionals (DSPs). People we served told us they were exhausted from the “revolving door” of staff and wanted more than a “caretaker.” Our quality of supports would be better if people stayed in their roles longer AND were educated better about the role of being a DSP while they were performing the role. We held focus groups and reviewed data to determine our next steps.



Being a DSP is one of the most complex positions in the organization and people in the role have different aspirations. In many organizations, DSP’s often have to move out of their role and further away from the people they support in order to be promoted. We wanted our team members who wanted to be DSPs to be able to do this and not have to move up and/or out for a promotion, or even worse, leave the field of disabilities because they felt they had no choice. We also didn’t want it to be an “exclusive” opportunity; we wanted it to be accessible to all who wanted to do it. We also know that like many of us in the field who are now in management, there are people who start in the DSP role and do want to move into management roles, and we definitely do need people who are in management to have front line experience. We also agreed that this is a “first job” for people who are transitioning to another work field, and it is our responsibility to provide them the education about people with disabilities in an “abilities” framework (meaning that we look at people’s strengths and use informed decision making with a strong emphasis on dignity of risk) that would expand into their workplace years later.

In 2016 The Arc NCR’s leadership team made the decision to invest, design and implement our Direct Support Professionals “Continuing Education Units” (CEU) Program. We used training modules, cohort groups and testing to determine our own DSP lattice program. We committed to paying the team members who did this in the form of an hourly rate differential as well as an annual bonus every year they were a DSP with The Arc NCR.

Our goal was that 10% of our DSPs would obtain the CEU certifications and that we would see a retention rate of 70% or better. We hired a position that supported this initiative in addition to developing an “on-boarding” curriculum for Front Line Supervisors to train their new team members. The opportunity was open to all DSPs – no matter how long they had been with the agency.

We developed the concept based on the NADSP Certification Program in place at the time. We did not think our team members would take the course as originally designed so we broke it down into more workable pieces that made sense to our organization's culture.

We did this until 2019 when we formally adopted the NADSP E-Badge program. The same concepts applied –

- open to everyone
- did not pay people to participate
- increase pay at each level with an annual bonus every year you are with the organization.

The biggest change was that an outside agency was credentialing our team members – which legitimizes the levels obtained. We offered it to all our CEU participants and paid a bonus to do the extra work required to formalize their credentials.

In 2019 we had over 10% of our DSPs credentialed as a DSP I, II, or III. We also had another 20% actively working on their badges. Our retention rate for the credentialed team was 90% (compared to non-credentialed at 53%). The participants also engaged in more levels of organizational opportunities like Town Halls, Leadership meetings, and planning meetings. The credentialed team members were in “pockets” of the organization and the quality of supports provided in these areas was exemplary based on our measurements of people's goals being met.

In 2020 we invested in the NADSP Front Line Supervisory (FLS) program that was to kick off in July 2020. We had made the decision to formally support our FLS's to obtain and see the value of promoting the DSP E-Badge program to their team and the impact on retention and quality of supports provided.



We pivoted like everyone else did during the pandemic and put many ideas on hold. We are currently working on rebuilding our workforce. The E-Badge program was available all during this time period. We are now dusting ourselves off, resetting and gearing up for renewal of our DSP and FLS program based on lessons learned. This is where we stand –

- 7% of our current team members have achieved their credentials
- 73% are retained (vs 50%)
- 65% are engaged in the DSP program to date
- Many who are “engaged” are new team members that joined our team in 2020 or after

We had to act and could not wait for our state rates to change. Turnover is expensive and impacts the quality of people's lives with IDD. Yes, people come to work for those we support for multiple reasons and leave for multiple reasons. We are committed to this priority of the E-Badge program because over time there are multiple areas of potential impact –

- The person supported
- The person's circle
- The team member while in the role as a DSP
- The team member stays longer because they feel valued and see their value
- The team member if they move up internally or externally
- The team member if they move to another agency that supports the E-Badge concept
- The team member that changes industries and becomes a partner with an IDD organization and see's "abilities"
- Our data reflects that as retention increases quality goes up with the certification

Our history says we must continue to challenge systems and beliefs to make a radical impact in our world. This is just one small thing our agency is doing to make the changes we believe will positively impact the lives of those we support.

Shawn Kros is the CEO of The Arc Northern Chesapeake Region. Shawn is passionate about creating a high energy and collaborative work environment where team members thrive and change the world's view of people with disabilities. Contact Shawn at Skros@arcncr.org



“Nothing About Us Without Us”: Including People with Intellectual and Developmental Disabilities Who Use Services in Succession Planning and Executive Hiring

By Amanda Rich

Author James Charlton wrote in their book [Nothing About Us Without Us](#) that the credo “expresses the conviction of people with disabilities that *they* know what is best for them” (p. 129). It’s a call for organizations that have missions to support people with intellectual and developmental disabilities (IDD) in living full lives, marked by dignity, inclusion, participation, and safety, to center their voices in major organizational decisions. This includes organizational strategic planning, succession planning, and hiring of executive leadership. Disabled people who use support services may not be the only stakeholder group, however, they are one of, if not the most important, group that is impacted by organizational decisions.

Though there is not data showing if, how many, and how organizations are involving people with IDD who use support services in succession planning and executive hiring, it is important that organizational leadership do so thoughtfully. Lehn Benjamin (2021) noted in an article from the [Stanford Social Innovation Review](#) that most of the published writing on non-profit management discussed engaging staff, volunteers, boards and funders but not the people who were intended to benefit from the program. They argue that this trend needs to change. Engaging people who use support services is essential to

ensuring the organization and its leadership “walk their talk,” embody their mission and gain valuable insight. It may also support organizational objectives. A [2021 study](#) published in *Voluntas: International Journal of Voluntary and Nonprofit Organizations* found staff commitment to their organization (employee’s belief in the organization’s mission, willingness to invest in the organization and a desire to remain with the organization) was positively associated with how well the organization engaged all of its stakeholders.



Additionally, engaging in continual questioning of if and how the voices of people with IDD who use services are included in major organizational decisions (such as strategic and succession planning and executive hiring) may help organizations avoid or constructively engage with a common type of conflict in nonprofit organizations

known as [“mission mirroring”](#). Mission mirroring is a phenomenon in which organizations that have a social justice focus (such as creating communities that are more inclusive of people with disabilities) internally “mirror” the challenges they are trying to address within the broader community. For instance, a disability support service organization having policies and practices that exclude or disempower people with disabilities is an example of mission mirroring. [Allyn \(2011\)](#) noted that mission mirroring may serve as a source of conflict in nonprofit organizations and has the potential to detract from important organizational activities and risk the reputation of the organization. However, this conflict, when addressed thoughtfully, has the potential to improve integrity and strengthen relationships within the organization. Participants should be at the center of an organization's management.

What This Means for Me and My Organization

There are considerations that may help leaders of disability serving organizations who may or may not be Disabled themselves to re-center or meaningfully include the voices of the people supported by their organization.

- Succession planning, hiring decisions and all strategic planning should be an expression of the organization's values. Ensure that everyone within the organization has a clear understanding of the organization's mission and core values. Leaders should begin by asking themselves how the mission and core values were identified, when they were established, and by whom? Were people who use the services involved? Are there stated values related to empowerment, inclusion, and participation of people with IDD who use the services? This ongoing [reflective process](#) supports a culture of learning and improvement across the organization. Broad [tools and strategies](#) for creating an organizational culture of ongoing learning may help leaders engage with these questions.
- Evaluate the board-of director and committee bylaws and human resource policies and procedures, to ensure that they are all driven from or consistent with values of the organization. Human resources and board policies and practices that are values-based, not only support the mission of the organization but have also been found to increase volunteer recruitment and retention (See [Akinlade & Shalack, 2017](#)). A recent article in MIT Sloan Management Review explores how "[whole company](#)" approaches that coordinate hiring, management, program, and administrative policies and practices, as well as ensure consistency with values rooted in social justice are necessary to effect change.
- Many decisions related to executive hiring and strategic succession planning are made by the board of directors. It is important to identify how people with IDD are included on the board of directors and other committees, barriers they may face and what accommodations might be needed for full and meaningful participation. The [Green Mountain Self-Advocates](#), [The Council on Quality and Leadership](#), [The Autistic Self-Advocacy Network](#) and [The Harris Family Center for Disability and Health Policy](#) provide several tools and resources to support people with IDD in serving on boards of directors and committee positions and participating in meetings. Some of these tools support organizational leaders in:
 - Identifying and using the best way each member communicates
 - Ensuring all material including agendas, role and responsibility descriptions, budgets, and supporting documents are in plain language and accessible
 - Allowing people to bring chosen supporters
 - Providing mentors
 - Providing time and space to practice
 - Evaluating the pace of meetings and the number of topics covered
 - Evaluating how participants are made to feel welcomed
 - Ensuring participants understand their right not to participate should they choose not to
 - Supporting all board members in recognizing their strengths and what they contribute to the group and organization.
 - Ensure funding and human resources are allocated to provide the support needed for meaningful participation

- Consider how, when, from whom, and on what your organization collects evaluation and quality assurance data. Are there outcomes related to leadership and input of people who use services? Is information collected on the direction and goals of the organization and skill sets needed by executive leadership? How is this process informed by and how does it impact people who use services?
- Consider flatter, [shared leadership](#) and/or models that include people with IDD who use services in paid leadership or administrative positions (See [The Arc of Northern Virginia](#)). These models involve the sharing of power and leadership responsibilities and may require [leadership development trainings](#) that include people with intellectual and developmental disabilities.

Many organizations that serve people with IDD are likely already working to center the voices of the people who their services in a variety of ways. However, the work to ensure that inclusion is meaningful, and people are not being “tokenized” or included for appearances only, is an ongoing process and all organizations can likely do better and/or more.

Let’s keep the conversation going! Please send us steps your agency is taking to bring people with disabilities to the table as contributors to the organization that we can include in our next issue of the Bulletin. What have you or others within your organization done that was helpful in ensuring that people who use services have their voices heard in major organizational decisions? Email ideas and suggestions to Amanda Rich at arich1@ycp.edu

Amanda J. Rich is an associate professor of Human Services at York College of Pennsylvania, the owner of Open Road Inclusive Community Consulting, the director of the Institute of Social Healing at York College of Pennsylvania, and the managing editor of the National Leadership Consortium Bulletin. Amanda holds a Ph.D. in Human Development and Family Sciences and is interested in the health and wellbeing of the human service workforce, trauma-informed and healing centered practices and disability justice. Contact Amanda at openroadicc@gmail.com.



Succession Planning: Why it's Essential for Nonprofit Leaders

By Caitlin Bailey

What Does the Research Say?

Succession planning, or the work that organizations do to [‘keep talent in the pipeline,’](#) is an essential and ongoing responsibility of leaders across sectors. While there are many succession planning approaches, key components of succession planning include:

- Gathering a team or committee who will inform and manage the succession planning process (this may include a board of directors, members of the team experiencing turnover, and organizational stakeholders including people with disabilities)
- Identifying the skills and needs for positions where there is upcoming turnover
- Developing or seeking people who have or can gain the needed experience, knowledge, and talents to fulfill those positions
- Developing and implementing transition plans for incoming and outgoing leaders
- Developing and implementing organizational plans (including a transition budget, supporting team development needs, identifying and measuring progress toward key benchmarks and outcomes, and more).

Today, succession planning is especially critical for leaders in the disabilities field. [Many reports](#) from the last twenty years show that Baby Boomers are retiring or intending to retire at rapid rates; a 2020 report from [Pew](#) showed that 3.2 million more Baby Boomers retired in 2020 than in 2019, indicating that the rates of retirement are growing as well. Paired with severe shortages in the [Direct Support workforce](#), particularly related to the [COVID-19 pandemic](#), and trends related to the [Great Resignation](#), the disabilities field is facing a significant leadership crisis that can be addressed, in part, by increasing effective succession planning practices.

However, instead of strategically working to prevent gaps in leadership, nonprofit sector research shows there is a lack of investment in [succession planning](#) and [leadership development](#) of the next generation of organizational leaders at all levels. In the last 15 years, numerous studies of nonprofit organizations have cited [succession planning as a top concern for nonprofit executives and boards](#). In 2017, [BoardSource](#) found that less than one-third of nonprofits actually engaged in intentional succession planning activities. Similarly, a 2010 study of Succession Planning found that nonprofit boards, on average, spent only [two hours each year](#) on succession planning and executive development.

The disability service sector is, unfortunately, following these trends. A [2009 study](#) of executives and emerging leaders in disability sector organizations found that less than 50% of respondents shared that their organization had a succession plan. Moreover, all respondents identified leadership development and mentoring for the next generation of leaders as a top priority within their organizations. While there is not more recent research specific to the disabilities field, it is safe to assume based on existing research and current conditions that agency leaders continue to struggle to invest needed time and resources into the development and future planning for their workforce.



What Does it Mean for Our Field?

Many agencies in the disabilities field are struggling to recruit and retain employees at the same rate that they are experiencing the retirement of their executive and top level leaders. Whether they are planning for it or not, succession is happening. Knowing the trends in retirement, particularly for people of older generations, and knowing the makeup of employees in organizations is critical. Some experts [speculate](#) that many baby boomers, particularly those working in non profit and human rights focused organizations, have delayed retirement because they entered their fields and devoted their careers to changing systems, organizations, and practices, and they want to [continue to impact change as long as possible](#). We've seen these trends in the disabilities field, in particular. However, at some point people will retire, and ensuring that agencies are prepared promote the next generation of leaders is essential for the sustainability and continued forward movement and progress of the disability service sector.

People leave their organizations for a long list of well-documented reasons, for some because they are dissatisfied, disengaged, or disenfranchised, and for some because they are naturally moving into new roles or retirement (and for some, a little bit of both). Some [studies](#) have found that one reason for turnover that leaders haven't figured out how to address (or address well enough) is the frustration that emerging leaders feel when they do not have access to adequate learning, growth, mentorship, development, and promotion opportunities. Front line workers like DSPs or Managers could be leaving because they do not feel there are opportunities for career advancement at their organizations. Recent reports, including the earlier referenced report from [Board-Source](#) show that nonprofits, which includes many DD service organizations, do not invest in the preparation and development of internal emerging leaders to prepare them to move into higher leadership and executive roles. This lack of investment has left many nonprofit organizations with vacancies and high turnover rates in leadership positions beyond those caused by anticipated retirement.



What Does it Mean for Me as a Leader?

Succession Planning can feel overwhelming, even for the most established and experienced leaders. There are a number of steps that leaders can take to prepare their organizations for impending or future succession:

- If you have influence on your organization's board of directors or governing entity, ask them to make succession planning a priority; they can form a committee, propose a process, or include investment in succession planning in upcoming budgets and strategic plans. This is important for all organizations, including those that don't have impending or planned turnover. If you do not directly influence your board, ask leaders in your organization to recommend succession planning as a priority.
- There are a great number of resources that can be helpful in the succession planning process, particularly related to planning for the retirement of executive leaders. As a leader, you can begin to collect free resources related to succession planning (here is [a free guide from a reputable source](#) that can get you started). Even if you are not in an executive role, building your succession planning knowledge and resource bank can be useful. You can develop succession planning processes and backup plans for your teams.

- Support people who are in leadership and management roles to document and save helpful resources, strategies, processes, checklists that they use in their role. One exercise that might be helpful is to ask people to consider: if they left tomorrow, what would they want the next person in their role to know? What resources would help them succeed? As people begin to collect and develop these resources, create a drive or space on a shared company drive to save these types of resources and information.
- Look at your organization's budget line for leadership development and investment (beyond mandatory or regulated training). The National Leadership Consortium conducted a quick study of investment in leadership development of organizations in our network. We found that, on average, less than 1% of organizational budgets were devoted to specifically leadership development. If your organization does not have a development line, is only investing small amounts, or if the development dollars are only being invested in a specific group of employees in your agency (e.g. executives, directors, etc.), you can see what's possible to address. What can your organization begin to invest next year, and over the next several years? Making leadership development a priority can inform your next steps: Do you need to fundraise or look for grants? Are there areas of spending that are unnecessary? Can you distribute development opportunities more equitably across the organization?
- If you want to be considered for positions of higher leadership in the future, share your intentions with a trusted supervisor, manager, or leader in the organization. Suggest opportunities for the organization to invest in your development. When you show that you are committed to the future success of your organization, the organization may be more motivated to invest in your development as well.

Caitlin Bailey is the Co-Director of the National Leadership Consortium. She holds a Ph.D. in Human Development and Family Science. Caitlin is passionate about enhancing leaders' skills and evidence-based practices in our field. Contact Caitlin at cbailey@natleadership.org.



Innovative Initiatives Q&A: Promoting Organizational Change as a Management Consultant

An Interview with Elizabeth Vasquez

Can you describe your work experience?

I have been a management consultant for about 40 years, with a focus on organizational development, that is, helping organizations and the people who lead them become better at what they do. Being this kind of consultant has involved me in projects like: developing employee surveys so organizations can hear from people about what's working well and what needs work; facilitating strategic planning processes so organizations can set their course in creative and inclusive ways; and designing training and leadership development programs to help people excel in their jobs and advance in their careers. I love my work because it gives me the chance to see people grow and to see organizations thriving and there's no better work than that!

Can you describe your development philosophy?

As a management consultant, naturally, I have thought a lot about leadership and how to help people grow as leaders. My philosophy about leadership development has evolved over the years and, in the end, comes down to two simple observations. First, leadership is not some inborn, magical capacity, rather it is the effective deployment of certain skills. For example, I am currently working with a set of skills derived from a series of interviews with the client organization's executives that includes: inspiring others, building teams, thinking strategically, thinking creatively, and developing others. Like other skills, these can be learned.

Second, I have long observed that most leadership development occurs on the job, so the job is where most efforts to develop leaders should be made. Great development can come from adding higher level responsibilities to the job itself or taking rotational or acting assignments. As I was learning these things in my practice, researchers were coming to the same conclusion. For example, the 70-20-30 rule from the Center for Creative Leadership is explained in more detail below. Essentially, their research shows that, ideally, 70% of development should occur on the job, rather than in classroom or traditional training models. So, in short, my philosophy, which is backed by research, is: leadership involves learnable skills and the best place to learn those skills is on the job.

In your experience, how has developing leaders from within impacted the organizations you've worked with?

I have been struck by the dramatic difference a good leadership development program can make in an organization. Common sense says that people who go through such programs are positively affected, but is the whole organization? In my experience: yes! But only if the program is a good one, has wide participation, and is sustained over time. My business partner and I had a chance to see this effect measured not long ago in our work with a federal agency.

Every year an Employee Viewpoint Survey, or EVS, is conducted across the federal government and the results are analyzed by organization. As the name suggests, the EVS asks employees to rate their job satisfaction across a number of elements. In the first three years of the leadership development program that mid- and senior-level managers participated in we looked for and expected to see a rise in EVS scores. But that didn't happen.

We began to wonder if leadership development as the principal intervention was enough to make a difference in employees' experience. Then in year four, the scales tipped and the EVS scores went up in precisely the items we had hoped to impact! And for the next several years, as more manag-

ers attended the program, employee scores continued to rise. By year 10, more than 230 people had been through the development program, which was about 30% of the agency's managers. Somewhere around the 15% participation mark, by my estimate, the employee experience had improved enough to be measurable on the EVS. Seeing the evidence in the employee feedback confirmed the value of the agency's investment and the leadership development program's approach and seemed to suggest that real culture change had begun to take place in the organization.

What happens when organizations do not do this?

The opportunity costs when organizations do not invest in leadership development are unquestionably great, though difficult to measure. The value of increased manager effectiveness, and the positive impact it has on the employee experience, cannot be overstated. Substantial research (by [Blessing-White](#), [Daniel Pink](#), and [Gallup](#), to name a few) shows that managers are instrumental in the critical areas of employee engagement, job satisfaction, retention, and productivity. To not develop the leadership skills of managers is to miss the chance for gains in all of those areas.

How do organizations looking to make changes begin investing in the development of their current and future leaders?

I would suggest that the organization's leadership team start by educating themselves about: 1) the potential value of investing in leadership development, 2) the approaches that are known to have the greatest impact, and 3) at least some idea of costs, timeline, and other operational considerations. This education can come in a number of ways; one way is to read about leadership development in business journals such as the *Harvard Business Review* or *Fast Company* and talk together about what's being learned. Another way is to talk with peer organizations that have put successful programs in place. Another is to meet with consultants who can help decision makers get an idea of how leadership development programs are developed, implemented, and managed on an ongoing basis.

Once the organization has decided to go forward, it's important to have the help of an experienced leadership development professional to facilitate the initial planning and decision-making process. Experts in this area can help pinpoint organizational needs and evidence based approaches; this can help organizations assure that they are investing in the right kinds of leadership development programs, ultimately saving them time, resources, and money. In the field of supports to people with developmental disabilities, organizations are fortunate to have expert resources available in the National Consortium on Leadership in Developmental Disabilities (NCLDD). The directors of the Leadership Institute, Kristen Loomis and Caitlin Bailey, are exceptional leadership developers with a great deal of experience in the I/DD field. They can help create a vision for the initiative, draft strategies for design and implementation, and identify resources to help carry it through, whether it is NCLDD consultants or others they may recommend.

Organizations that decide to create a leadership development program or raise an existing one to the next level are taking on a major effort, but they can be confident that, if done right, it will definitely be worth the effort!

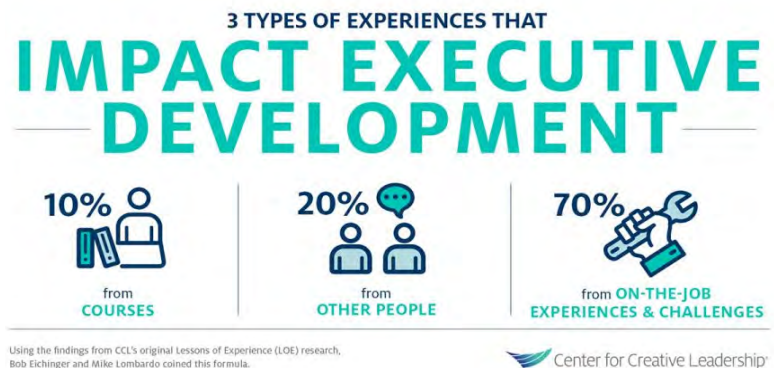
Elizabeth Vasquez, a partner in Management Consulting Associates along with Barbara Upston, has had a long career in organizational and leadership development, including 10 years as a facilitator at the Leadership Institute. She would be happy to hear from you and can be reached at: mca@consultmca.com.



Three Types of Experiences that Impact Executive Development

Developed by the Center for Creative Leadership

The Center for Creative Leadership in North Carolina has researched the ways people acquire leadership skills and found that about 70% of leadership learning happens on the job; 20 % through observation of or interactions with others such as supervisors, mentors, or peers; and 10% in classroom training. This finding is known as the 70-20-10 rule. Here are some examples of no- or low-cost job-based developmental activities you can do yourself in an intentional way or make available to the people who report to you:



- Taking on new or challenging tasks within the current job
- Participating in a job exchange—trading jobs or tasks with co-workers
- Taking a representational assignment—filling in for a co-worker or manager at meetings
- Taking an acting assignment—temporarily taking the place of a co-worker or manager
- Participating on or leading a task force, committee, work group, or special project
- Shadowing a skilled co-worker or manager to see the application of targeted skills
- Shadowing a manager or employee in another unit to better understand their work
- Facilitating problem solving discussions with co-workers about project or workplace issues
- Participating in meetings with experienced staff on new topics, tasks, or projects
- Attending or delivering subject matter training within or outside of the organization
- Attending or delivering on-line courses, webinars
- Facilitating a focus group of employees, customers, or stakeholders
- Making or attending presentations at conferences
- Attending or presenting at client meetings
- Getting specially targeted feedback from a supervisor or other respected person
- Having an effective individual become a mentor or coach
- Working closely with another organization, for instance a partner or sub-contractor
- Facilitating a process improvement discussion with own work group
- Writing an article on a program or leadership topic for the new newsletter
- Writing a grant or contract proposal section on own or new area of expertise
- Researching strategic issues or opportunities of significance to the organization
- Training co-workers in own job skills
- Cross-training to learn elements of a co-worker's job

What We're Reading, Viewing, and Listening To

Title: Storytelling for Leadership: Creating Authentic Connections

Author: Charles Vogle (2020)

In this well-reviewed book Charles Vogle gives practical advice on using stories effectively to inspire others and effect change. The book is concise, useful and engaging.

Link: https://www.amazon.com/dp/B083QNB9ZV/ref=dp-kindle-redirect?_encoding=UTF8&btkr=1

Title: Dare to Lead:

Brave Work, Tough Conversations, Whole Hearts

Author: Brene Brown (2018)

Brene Brown, known for her disruptive research on vulnerability, has taken her concepts and teachings and applied them to leading in the workplace. The book offers concrete tools to become more reflective, engage in difficult conversations and issues, and to build bravery in ourselves and our teams. It's a hopeful and, at times, uncomfortable read as it encourages the reader to reflect on their own stories and fears so that they can approach people at work with empathy and courage.

Link: <https://brenebrown.com/book/dare-to-lead/>

Title: Uncharted Grounds:

Stanford Social Innovation Review Podcast

Author/Host: Jonathan Levine

In each episode Jonathan Levine takes a deep dive into nonprofit organizations that are working to solve problems and improve people's lives around the world. Though the podcast is not specifically centered on leadership, each story gives important insight into effective nonprofit leadership.

Link: <https://ssir.org/podcasts/category/unchartedground>

Title: The Good to Growth Podcast

Author/Host: Katie Appold

The Good to Growth Podcast is part of the Nonprofit Hub. Each episode features an interview with a non-profit leader about important topics such as branding, fundraising, remote work, management and more.

Link: <https://nonprofithub.org/podcasts/>

Title: Inclusion On Purpose

Author: Ruchika Tulshyan (2022)

This book discusses the fact that meaningful inclusion in the workplace and beyond takes time, intentionality and practice. Tulshyan provides best practice tips on supporting belonging in the workplace in a hard to put down read.

Link: <https://mitpress.mit.edu/books/inclusion-purpose>

Upcoming Events

Leadership Institutes

A select group of future leaders convene with a renowned faculty of national experts on progressive supports for people with disabilities during our intensive in-person or virtual Leadership Institutes. Participants explore leadership in organizations that provide, advocate for, or fund community-based services and supports for people with intellectual/developmental disabilities and their families. Leadership Institutes emphasize:

- Managing and sustaining values-based transformational change;
- Determining organizational and professional direction;
- Experimentation and risk-taking;
- Assessing and honing leadership skills; and
- Building a life-long professional network to sustain career growth.

The focus of the Leadership Institute is on supporting participants to determine and set organizational direction to move their organization to a high-performance model and build a lifetime network of peers and leaders to sustain career growth. Check out our upcoming Institutes and training sessions below.

September 2022

The Colorado Leadership Institute will be September 18-23, 2023. If you would like to be notified when we open applications for this Institute, please add your name to the list [here](#). This Institute is open to all Disability Sector Leaders in Colorado.

Fall 2022

The Midwest Leadership Institute will be held in Fall 2022 in the Midwest. If you would like to be notified when we open applications for this Institute, please add your name to the list [here](#). This Institute is open to all Disability Sector Leaders in the Midwest.

Winter 2023

The Winter Leadership Institute will be held outside of Philadelphia, PA in Winter 2023. If you would like to be notified when we open applications for this Institute, please add your name to the list [here](#). This Institute is open to all Disability Sector Leaders.

Winter 2023

The Winter Virtual Leadership Institute will be in Winter 2023. If you would like to be notified when we open applications for this Institute, please add your name to the list [here](#). This Institute is open to all Disability Sector Leaders.

Spring 2023

The Virtual Leadership Institute will be held via Zoom in Spring 2023. If you would like to be notified when we open applications for this Institute, please add your name to the list [here](#). This Institute is open to all Disability Sector Leaders.

National Leadership Consortium Workshops

In addition to our Leadership Institutes, the National Leadership Consortium offers virtual workshop sessions throughout the year. Topics of these sessions include:

- Leadership Bootcamp
- Leading Great Teams
- Avoiding Burnout in Yourself and Others
- Trauma-Informed and Healing Center Approaches
- Promoting a Culture of Diversity, Equity, and Inclusion in Your Organization
- Succession Planning with Intention
- Leveraging Your Leadership Strengths

If you would like to learn more about these workshops, please add your name and email to our Workshop List [here](#).

Upcoming Conferences

Come see us at these national conferences!

July 31- August 2, 2022

The Reinventing Quality Conference will be held in Baltimore, Maryland. Attend the conference and stop by our exhibit table or join us for a session on The Future of Leadership in Our System. To get more information or to register, [click here](#).

October 11, 2022

The National Leadership Consortium Pre-CQL Conference Session: Building Leadership Networks and Skills: An Opportunity for Leaders to Connect and Grow will be held in Las Vegas, Nevada before the 2022 CQL Conference. Leaders who are attending the full CQL conference in-person are invited to join us for a workshop. \$200 per attendee. To sign up, [click here](#).



Contact Us

www.nlcdd.org/bulletin • bulletin@natleadership.org

If you have any trouble accessing the referenced material, please email Amanda J. Rich at openroadicc@gmail.com.