**Steering Committee for the Education Leadership Institute**

**Meeting Minutes**

**October 26-27, 2009**

**APTA Headquarters**

In attendance: Beth Domholdt, Michael Emery, Martha Ferretti, Susan Nelson, Michael Pagliarulo, Margaret Plack, Lois Nora

Staff: Jody Gandy, Ken Harwood, Elizabeth Grotos

Member introductions

Presentation

Marilyn Phillips and Suzanne Armstrong from the Department of Professional Development provided a one-hour presentation on current available technologies that could be used in providing an Education Leadership Institute (ELI). These include:

* APTA’s Learning Center to provide online education using high tech (narrative, power point slides, animation, discussion board designed for a specific community, interactive questions, resources and references with links) and low tech (power point without narrative, references and resources, reflective questions, discussion board designed for a specific community).
* Webinars (videoconferencing)
* Audio conferencing
* Podcasts
* Share Point as a mechanism to network a community with announcements, discussion board, access to uploaded documents, shared documents, news & updates, rosters, etc)

Key points from the presentation

* Technology is a vehicle whereas content being provided is the driver
* Consider how learning and interaction will occur using synchronous and asynchronous learning opportunities
* Specific technology used needs to consider return on investment (consider cost of methodology used and cost to deliver)
* Important to find methods to build a network community (e.g., Learning Center can be designed for a unique community of users as can Share Point)
  + Able to create learning group online before meeting face-to-face learning
* Consider how assessment will occur (level of competence required and number of times to repeat a posttest)
* Use of APTA Learning Center
  + Learners obtain CEUs and can print their certificates
  + Able to require post-evaluation assessment
  + Able to conduct a quick survey to obtain information about learners
  + Able to manually enroll a defined cohort for easier learner access through the registration process
  + Can create a course that allows for manual (non-fee based) and open enrollments (fee-based); two different assessments can be provided (course discussion within a group versus larger group)
  + Able to provide a pretest and posttest for each module for research purposes or posttest only per module for CEUs
  + Able to create a comprehensive post-assessment for a group of modules for outcomes assessment
  + Able to post a course for a defined time period of time to meet assigned deadlines or keep courses up indefinitely
  + A new curriculum and instructional design staff is planned in Professional Development
* Discussion Boards
  + Use learners as resources for one another; instructor becomes another participant in the discussion
  + Instructor may need to be able to facilitate and prod learners periodically with key questions and reflections; course may require faculty monitoring with new concepts or if learners are not able to link the concepts
  + Instructor can oversee the discussion with each section having a moderator
  + Learners can summarize their own threaded discussion
* Use of Webinars
  + Adobe Connect for streaming live Webinars and events can be archived from live activity with immediate posttest
  + Consider live video streaming presented at multiple sites – to build small cohort connections
  + Webinars are used to meet a specific training need with more synchronous learning
* Use of Podcasts
  + Podcasts can be provided through APTA
  + Investigating the ability to integrate podcasts into the Learning Center
* Use of Share Point
  + Facilitate community interaction with defined groups to be able to communicate via discussion board, share and edit documents, review documents, provide news and updates
* Use of Synchronous Technology
  + Live intercampus meeting for communication among faculty and students and learners
  + Avatar - Use of simulation and standardized situations a leadership problem (avatar and get a call at the middle of the night)
  + Cohorts with leadership issue have to come together to resolve using avatar

General Discussion/Thoughts about ELI

* Watchful eye
  + IOM and initiatives related to the future of Nursing; looking at the re-conceptualization of the role of nursing and nursing education (RWJ and IOM); Are there similarities in physical therapy?
  + Continuing education as related to Interprofessional education (IOM with Nathan Foundation) National Interprofessional Continuing Education Institute
  + Shortage of physicians and nursing creates a high level visibility with strong influence related to health care reform
* Decisions about delivery are highly correlated with curriculum content
  + Providing for several levels of content for academic administrators
    - interpersonal communication and relationships internally and externally
    - application to day-to-day work
    - ability to think more globally about the role and responsibilities and opportunities
* Concepts to be considered for inclusion
  + Systems context – higher education in the US and the health care system
  + Learning Society –(e.g., use of evidence-based practice applied to clinical practice and issues associated with productivity and outcomes effectiveness
  + Interprofessional education, practice, and research
  + Sensitivity about the use of language (implicit curriculum, relationships, and objectives)
  + Design curriculum to build partnerships
  + Communication – understanding how to communicate through change and understanding the bigger context
  + Managing and driving change
  + Innovation/entrepreneurial/creative thinking integrated with concepts of professionalism and legal issues
* Concepts can initially be presented in a straightforward manner then apply these concepts using strategic thinking and concepts of change (i.e., budget changes (cuts, increases) , budget negotiations)
  + Select the most relevant content (principles, theories, and models) followed by opportunities for application and analysis
  + Body of literature addresses the science and art of leadership and provides vocabulary associated with academic leadership
  + Consider level, depth, and breadth of content to be presented
  + Methods might include read and review literature, discuss with others, application through cases, integration into real life situation analysis
  + Include ethical issues in the application and integration of content to the specific institutional setting
  + Case situations of strategic thinking and scan environments
* Academic leaders should be well versed in both education and clinically- based issues including the practice paradigm, practice management, and academic/practice partnerships
  + Partnerships – academic (examples of different partnership situations followed by Web Ex to expose learners to a network to complete their work; provide examples of different partnership programs)
* Issues related to learners
  + Cohort learning – consider relatively small cohorts for aspects of the program that are on line to facilitate networking and to be manageable for faculty and facilitators
  + Seek explicit confidentiality beginning with the initial meeting of the group and throughout the program; learners will be sharing personal challenges within their respective academic institutions that must be confidential
  + Self-assessment – conduct learner self-assessment in areas such as leadership and management styles; remaining authentic
* Outcomes
  + Opportunity for academic institution to work out a problem within the institution as a part of the learner’s individual capstone project
  + Project should give back to the academic institution to facilitate “buy in” and long term investment
  + Need to assess outcomes of the following components
    - Learner outcomes
    - Curriculum assessment and delivery
    - Program outcomes
    - Longitudinal program outcomes and contributions to education and the profession
* Use of facilitators/coaches/mentors
  + Identify expert academic administrators to serve as facilitators/mentors/coaches in ELI
  + Individuals identified as facilitators/mentors need to convey a positive outlook about the role of the academic administrator
  + Opportunity for expert academic administrators to serve as a mentor for others in providing succession planning

**Description of Proposed Components of ELI**

Application Process

* Information provided to Applicants about ELI
  + Provide defined goals for ELI
  + Identify content areas available within ELI
* Applicants: Aspiring and novice leaders in physical therapy education
  + Need to bring along additional aspiring academic administrators to fill positions given the potential future vacancies
  + Mid-career program directors not included right now but perhaps in the future when the urgent need is met (ELI 2)
* Application criteria
  + Provide personal career goals statement and relevance of ELI
  + Statement of purpose for the participant and for the academic institution to participate in the institute
  + Participant provides his/her initial leadership development plan for entering ELI with expectations for further refinement of that leadership development plan
  + Completion of self-assessment(s)
  + Based on the objectives of the institute, identify which of these are important for you to attend the institute
  + How will you fit ELI into your current work?
  + What do you perceive as your greatest challenge?
  + Learner recognizes that there is a time commitment for what the institute will require
* Nominations process
  + Internal nomination process from the academic institution
  + Nominator to address specific goals for the institute nominee
  + Dean/Direct supervisor provides and approves the nomination and the applicant and supervisor both have to sign off on the nomination
  + Demonstrate that the individual is being nominated to advance within the institution
  + Provide an example of a successful applicant to assist

Infrastructure for ELI

* Length of ELI: one year
* Parallel cohorts move through a series of modules (consider anywhere from 20-30 participants)
  + Small participant groups go through the program together with assigned mentors
  + Consider smaller groups of 5-7 learners at a time with assigned mentors
  + Consider more homogeneous groups (e.g., aspiring academic administrators, novice academic administrators) depending upon the size of ELI
* Participants receive CEUs for both online and face-to-face training components
  + Face-to-face meetings to occur throughout the year
  + Networking (could be through video or face-to-face) meeting should occur early for the initial meeting to build the cohort community
    - First meeting convened at the fall annual Education Leadership Conference meeting (AASIG/Clinical Education SIG of the Education Section)
    - Facilitates reduction in costs and fosters attendance at ELC
    - Education Section might consider reduction in registration for ELI participants to show support?
  + Convene additional face-to-face meetings in a retreat format beyond ELC that are not associated with a conference
  + Provide asynchronous application activities relevant to the learner’s environment.
* Graduates of ELI
  + Receive a “Certificate of Completion”
  + Eligible to become future mentors in ELI perhaps in successive years
  + Promoted and published
* Participants are responsible for exploring options of receiving academic credit for ELI course content.
* *Investigate the possibility of a credentialed Fellowship in Education Leadership?*

Target Size

* Limited number of participants within the ELI (targeted 20-30 annually)
* Provide for 6-8 mentors/facilitators
* Smaller cohorts to build a successful model and to ensure mentoring and strong networking

Networking and Building Cohort Communities

* Online cyber communities
* Face-to-face communities
* Component with mentoring/facilitation in building communities

Participant Capstone Project

* Develop and refine professional leadership development plan throughout ELI
* Complete a project relevant to the needs of the participant’s academic institution
  + Academic institution leader is involved with the participant as he/she completes ELI
* Final comprehensive assessment using simulations (cases)

Research Outcomes/Assessments

* Objective measures for research and assessment
* Objectives for the individual, institution, and profession
* Learner outcomes project that gives back to the academic institution; project to be completed in the learner’s institution
  + Learner’s project is not fully outlined during the application process but should be clarified by the time the cohort meets for their first face-to-face meeting
* Provide mechanisms for participant self-assessment with respect to leadership (e.g., 360 degree assessment)
* Personal Leadership Development Plan - tool for future position development
* Dr Sharon McDade, George Washington University
  + Worked with the ELAM program at AAMC to develop program assessments
  + Margaret Plack to get in touch with Sharon to see if she would be willing to share information about program outcome assessments
* Formative ELI Program Assessments
  + Survey immediately upon graduation
  + 6-month follow up of ELI graduate to define changes
  + 3-year follow up?

Promotion of ELI

* Promote ELI as a selective process with application criteria and a nomination process
* Promote Goals of ELI
* Promoted Objectives of ELI with the addition of:
  + Participants to complete a project relevant to their academic institution and to be completed in their environment
  + To give voice to aspects of leadership and change since attending ELI and to advance physical therapy education. (Objective 1C)
  + Engage in leadership positions within the academic institution and/or the profession. (New Objective)
* Tag line: Preparing the next generation of future leaders

Promotion of ELI Graduates

* Create a Share Point Community for ELI graduates as alumni with a structure for their ongoing communication and networking
* At the final face-to-face session provide for a “completion/graduation event”; provide a celebration ritual/recognition as a part of the national Education Leadership Conference (ELC) that showcases ELI graduates
* Consider linking an education program at the ELC meeting for ELI graduates

Funding ELI

* APTA supports a portion of the costs
* Academic institution provides financial support for their participant to attend ELI
  + Participant outcome project to be completed within the academic institution
  + Participant requires the academic institution’s support and resources (e.g., time commitment, finances, guidance) to complete their project
  + Participant will need to negotiate with the Dean for project support
* Availability of potential funding for the institute?

**ELI Curriculum Content and Design**

Prerequisites for ELI

* Complete personal self-assessments
  + Myers-Briggs Inventory or other similar inventory
* Complete other self-assessments in preparation for curriculum

Curriculum Content

The framework of ELI Curriculum Content is described by key content categories, learning outcome objectives for each content area, proposed content, suggestions for participant assignments to integrate content, required readings (need to establish a total page limit to manage participant workload), additional readings as time permits, and assessments. The curriculum and ELI design is a work in progress as the Steering Committee works to clarify and refine this information in preparation for developing courses in an online format and to give guidance to experts that will author this content.

**1) Personal Leadership and Management (I) and 3) Institutional Leadership and Management (II**)

*Outcome Objectives*

Upon completion of this module the participant will:

1. Describe and apply contemporary leadership theories, principles, and values that are relevant to higher education and physical therapy education.
2. Identify, explain, and implement management strategies that are grounded in leadership principles, institutional strategic planning documents, and knowledge of the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify/explain decisions and actions to others based on an understanding of the academic administrator’s responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities and directives.
5. Apply methods of management and principles of leadership in a changing higher education environment, responding to opportunities, threats and challenges.

*Proposed Content (Need to sort personal and institutional leadership and management content)*

* Theory and models
* Leadership Values (credibility) - building effective teams
* Decision-making (complexities)
* Strategic and global planning and thinking (applicants, work force needs. strategic situation of programs)
* Balance between faculty and leadership roles
* Capacity building and sustainability (succession planning)
* Conflict management and mediation/arbitration
* Negotiation skills
* Running effective meetings
* Shared accountabilities
* Shared vision
* Time management
* Empowerment
* Credibility (different levels of faculty)
* Stress management
* Ethics and professionalism in leadership
* Leadership styles (e.g., transformational leadership)
* Self-presentation and image
* Communication (help others understand broadly why can or cannot access specific resources)
* Change agent
* “Leadership under plenty and paucity”
* Power differentials
* Faculty Advocate and Institutional Representative
* Application level: Personal leadership statement
* Glossary

*Assignments*

1. Conduct an institutional scan of leadership styles, models, principles and assumptions at your institution. Describe in a written assessment, the primary leadership styles and the underlying principles and assumption, which may require some discussion/interview of institutional leaders.
2. Read from a selected list of contemporary leadership texts. Then, draft a leadership strategy about a specific desired leadership characteristic (e.g., transparency in leadership, empowerment of faculty, credibility) that you wish to enhance based on the principles and values presented in the readings that are applicable in your academic setting.
3. Given leadership ‘challenge’ scenarios, develop an action plan to address the scenario, identify an intended outcome, provide a justification for the action plan proposed, and a method to assess your action plan results. (advance and on-site)
4. Complete a personal leadership skills and attributes self-assessment. Identify personal priorities for development of leadership abilities. (prerequisite)
5. At the conclusion of this module, review and update your professional development plan.

*Required Readings (TBD)*

* Departmental Leadership in Higher Education, 2001
* Selected articles from the journal on *Leader to Leader*
* Kouzes and Posner, Leadership Challenges
* Complete 360-degree leadership assessment (accommodates positional differences) – contextually based within current position and setting
  + Complete personal leadership assessment
  + Complete institutional leadership assessment

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**2) Higher Education, Health Care Systems, and Society**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Differentiate among types of higher education institutions and evaluate the impact of institutional type on one’s work as an educational leader.
2. Understand mechanisms of oversight in higher education (e.g., governance) and analyze their impact on and importance to physical therapy education.
3. Evaluate the impact of major trends and issues in health care on physical therapy education.
4. Evaluate the impact of major trends and issues within society on physical therapy education.

*Proposed Content*

* History of US higher education and health care systems (compare and contrast)
* Public and Private and Proprietary Education
* Global perspective of higher education and health care systems
* Future directions
* Politico-sociocultural-economic frameworks for higher education and health care
* Outcomes assessment requirements
* Structure of higher education governance
* Mission and philosophy of institutions and programs
  + relevance and importance to academic program
* Faculty shared governance
* Establish common vocabulary (e.g., Carnegie Classifications)
* Oversight mechanisms in higher education – regional, state higher education, specialized accreditation, program accreditation
  + learning activity - review last self-study at the institution and programmatic levels
* Regulatory issues for higher education
* Funding for higher education
* Use this information back with the program/institution
* Concepts of a learning society
* Demographics of society and current and future of higher education populations (ethnicity)
* Emerging issues (Interprofessional education [IPE], Interprofessional practice [IPP], Interprofessional research [IPR], developing and changing health care systems)
* Interact with different academic groups/individuals within the institution
* Resource available (reference list for category, other organizations, books)
* Glossary

*Assignments*

1.    Review the Carnegie Classification of Institutions of Higher Education and determine the classification of your current institution. Articulate the ways in which your unit and your role as a leader would differ if the program were housed at a different type of institution.

2.    Identify a major change that you might want to make within your program and track it through the approval and oversight mechanisms needed to implement the change. Include the major internal (administrative structures, budget, and curriculum approval mechanisms) and external bodies (regional and programmatic accreditation bodies, financial aid regulations, and state higher education coordinating boards) that should be considered.

3.    Scan the contemporary higher education, health care, and societal environments to identify major trends and issues that are having or will have an impact on your program in the near future and craft responses that mitigate negative impacts and maximize positive impacts.

*Required Readings (TBD)*

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**4) Resources/Financial Management**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Describe the stream of revenues and expenditures for higher education.
2. Analyze the impact of different budget scenarios (e.g., enrollment changes, state funding changes) on institutional and program financial statements.
3. Defend the use of different financial ratios as they apply to academic programs.
4. Analyze your capacity to participate in academic institution fundraising/development/business development activities and describe the developmental steps to increase/maximize your capacity.
5. Interpret the major financial documents for your academic institution or unit and analyze trends over the past five years.

*Proposed Content*

* Advocacy (institution, state, legislative)
* Stewardship and fiduciary responsibility
* Fundraising
* Creative/innovative funding alternatives
* Understanding at a macro level how budgets are created at the institution level (alternative sources of funding - endowments, funding, legislative, type of institution, tuition, and other revenue generating programs within the institution)
* Direct and indirect costs
* Understanding the budget and budget process
* Extramural funding
  + formulas (soft money)
  + understand grant funding processes (types of grants available)
  + diversified funding sources
* Common ratios (i.e., Return on Investment [ROI])
* Negotiating under different circumstances (plenty of resources or paucity and need for resources)
* Institutional financial health
* Determining budget priorities (short term, long term, and institution priorities)
* Involving faculty in the budget process
* Glossary

*Assignments*

1. Describe the stream of revenues and expenditures for your unit within your academic institution.
2. Describe your physical therapy program budget within the construct of the academic institution’s budget and detail budget implications of AAR:
   1. increase/decrease in class size of 25%;
   2. increase/decrease in state funding by 25%; and
   3. reduction in grants/external funding over the next three years by 25%.
3. Design two methods to improve departmental/program financial ratios.
4. Working with the academic institution CFO, identify the sources of revenues/expenditures for your academic institution; analyze the stability of these funds and detail concerns of the CFO regarding academic institution funding. Describe a potential response.
5. At the conclusion of this module, review and update your professional development plan.

*Required Readings (TBD)*

1. Finances for nonfinancial persons
2. Kent Chabotar
3. Association of Governing Boards
4. NACUBO – National Association of Colleges and University Business Offices

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**5) Legal Issues**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Assess the ways in which external legislation/regulation and internal policies impact students, faculty, and staff interactions.
2. Describe the circumstances when and how your program engages academic institution legal counsel.
3. Describe risk management processes required for academic program operations.

*Proposed Content*

* Risk management
* Federal laws and regulations
* Contracts (e.g., affiliation agreements)
* Documentation for any controversy
* Working with academic institution Legal Counsel
* Faculty and student grievance
* Disciplinary action
* Glossary

*Assignments*

1. Apply key external legislation or internal regulations to three cases involving: 1) an academic issue; 2) a student comportment issue; 3) claim of workplace harassment.
2. Evaluate congruence of a program handbook (e.g., student, clinical education manual) with academic institution policy and procedures.
3. Interview a member of the academic institution Counsel’s office re: risk management for your area; when they should become involved in a dispute in your area; what the key legislation/regulatory issues are.
4. At the conclusion of this module, review and update your professional development plan.

*Required Reading (TBD)*

1. Thomas-Killman Conflict Instrument

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**6) Student Affairs**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Apply institution and program-based policies, procedures, and federal regulations to manage student related issues including a student grievance process.
2. Create an enrollment management process that is defensible and congruent with the institution and program missions.
3. Manage a wide variety of student needs and issues including, but not limited to, reasonable accommodations, students in crisis, and inappropriate or unprofessional behaviors.

*Proposed Content*

* Students rights and responsibilities
  + Student safety
  + Appropriate accommodations
* Student documentation
  + Activity - Provide a "laundry list" of typical policies and procedures for students to search in their institution
  + Activity - Set up hyperlink to the Legal Issues module by identifying key Federal regulations
* Student grievance, appeals, and litigation
  + Dismissals and probation
  + Quality of student and faculty handbooks
  + Activity - Set up hyperlink to Legal Issues module for Federal regulations/ADA
    - appropriate accommodations for health care students (in classroom and clinical environments)
    - hyperlink to conflict resolution/mediation leadership skills
* Technical skills and essential competencies
* Students in crisis and distress
* Admission processes
* Recruitment and retention processes
* Academics versus student behavior
* Performance assessment of students
* Student organizations and activities
* Student resources (required and preferred)
* Glossary

*Assignments*

1. Given a case study about the policies and procedures related to a student issue, apply the policies, procedures and regulations within their academic institution. (face-to-face)
2. Identify your program's current enrollment management processes (recruitment, admissions, retention, federal regulations) and analyze its congruence with the program and institution missions.
3. Given simulated situations of a program director managing a meeting with a student with a need/issue/crisis, analyze the situation using a framework presented/developed in the leadership module.  (face-to-face; post online course)

*Required Readings (TBD)*

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**7) Human Resource Management**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Analyze the policies and procedures of the work environment to ensure that they promote individual growth and development within the context of the missions of the department, school, and institution.
2. Facilitate institutional tenure and promotion policies to ensure successful faculty development.
3. Given existing formative performance evaluation methods for faculty and staff, link incentives to performance.
4. Implement a mentoring program that promotes individual development.
5. Differentiate between human resource issues in higher education and practice environments.
6. Evaluate faculty workloads to achieve approved individual development plans and scholarly agendas.
7. Apply policies and procedures in a fair and equitable manner with respect to hiring, removing personnel, salaries, contracts, and diversity.
8. Empower faculty through delegation and shared leadership.

*Proposed Content*

* Faculty and staff evaluation and development
  + performance appraisals
* Scholarly agendas of faculty
* Systems of promotion and tenure
* Faculty workload
* Incentives
* Faculty and staff recruitment, retention, hiring, retrenchment, and firing
* Faculty coverage for release time
* Understanding faculty and staff unions
* Salaries and contract variations
* Supervision and delegation
* Faculty diversity
* Faculty shared leadership and empowerment
* Personnel policies
* Faculty and staff in distress (crisis)
* Mentoring and modeling
* Effective communication
* Student workers (GAs, TAs, work study)
* Glossary

*Assignments*

1. Review and discuss a professional development plan for a member of your staff and junior/novice and senior/experienced faculty based upon a self-assessment in the context of the missions of your department and institution. Summarize in writing the conclusions of the meeting and sign with the other party.
2. Describe how you have determined a member of your junior/novice faculty understands the institutional policies and expectations on tenure (where appropriate) and promotion as well as the CAPTE expectations on establishing a scholarly agenda.
3. Describe the strengths of the performance enhancement procedures for faculty at your institution. Suggest methods to improve them where appropriate.
4. Given the following two scenarios (describes faculty with high teaching versus scholarly agendas in institutions with different Carnegie classifications), establish and defend workloads (percent of teaching, scholarship, and service) for the faculty members. (face-to-face)
5. At the conclusion of this module, review and update your professional development plan.

*Required Readings (TBD)*

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**8) External/Internal Relationships, Influence, and Partnerships**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Apply the principles that guide being a change agent to establishing new relationships and partnerships for academic programs.
2. Analyze risk factors that may cause new relationships with stakeholders from being established.
3. Analyze which principles associated with establishing new partnerships with your program would be challenging to employ in your environment.
4. Apply the principles for creating a departmental positive public image that would be acceptable in your environment.
5. Compare and contrast the concept of “leading from the middle” with two other leadership paradigms/models for creating new partnerships.

*Proposed Content*

* Change agent
* Understanding power and influence
* “Leading from the middle” – persons above, below, and at the same level
* Alumni relations
* Principles of partnerships
* Evaluating and managing risks in partnering
* Opportunities for building internal and external relationships
* Building partnerships and coalitions
  + Building strategic external partnerships and alliances
  + Building clinical education partnerships
  + Interprofessional and interdepartmental relations and partnerships
  + Identifying opportunities for new partnerships
  + Developing clinical residency and fellowship programs
* Visibility – knowing when to be visible or under the radar
* Identifying and working with stakeholders
* Marketing and public relations
* Glossary

*Assignments*

1. Conduct a scan of the community in which the institution resides, identify potential stakeholders for supporting the clinical education program, and propose a strategy for communicating the program’s needs and possible partnership that can be created between the program and x# of the identified stakeholders. Identify potential risks that either party may experience.
2. Analyze the public profile of the physical therapy program in terms of its strengths and weaknesses within the institution and within the local community. Propose methods for creating greater visibility about its strengths among academic departments of the institution and within targeted organizations and agencies in the community and propose solutions for improving the identified weaknesses or lack of visibility in each of these stakeholder groups.
3. Review the concept of “leading from the middle,” analyze the leadership characteristics you possess, and determine which skills identified with leading from the middle you possess and those that you don’t and propose a development strategy for yourself to acquire those skills that are missing.

*Required Readings (TBD)*

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

**9) Program** **Development and Outcomes Assessment**

*Outcome Objectives*

Upon completion of this module the participant will:

1. Compare and contrast models of curricular design.
2. Determine which curricular model best meets the vision, mission, strengths, and constraints of your program, the institution, and practice.
3. Develop a comprehensive program evaluation plan including benchmarks consistent with your program and institution vision and mission.
4. Design a comprehensive program evaluation process consistent with current institutional and programmatic accreditation standards.
5. Evaluate the efficacy of your current program evaluation process.

*Proposed Content*

* Accreditation purpose and scope and components (use components to build)
  + Application question: What if accreditation were awarded only to the best programs, how well would we do?
* Linkage between vision, mission, and outcomes
* Methods of curriculum and program assessment (formative, summative, methods of assessment, etc)
  + Principles of adult learning applied to teaching/learning
  + Curricular models and content
  + Instructional design and models of delivery in providing curriculum
* Approval processes for curricular revision
* Establishing program benchmarks
* Encourage attendance of CAPTE training for program accreditation
* Glossary

*Assignments*

1. Evaluate the efficacy of your current curricular model and make recommendations for contemporary enhancements as related to the PT/PTA Normative Models, Guide to Physical Therapist Practice, and CAPTE Evaluative Criteria for PT/PTA Education Programs.
2. Develop a comprehensive program evaluation plan including data collection methods, methods of analysis, benchmarks, and timelines for collection and analysis.
3. Review the most recent conclusions of your institution’s self-study and identify areas in your academic program that contribute to the recommendations.
4. At the conclusion of this module, review and update your professional development plan.

*Required Reading (TBD)*

* *APTA Outcomes Assessment in Physical Therapy Education*
* *APTA Normative Model for Physical Therapist Education*
* *APTA Normative Model for Physical Therapist Assistant Education*
* *Minimal Skills for the PT at Entry-Level*
* *Minimal Skills for the PTA at Entry-level*
* *Evaluative Criteria for the Accreditation of Physical Therapist Education Programs*
* *Evaluative Criteria for the Accreditation of Physical Therapist Assistant Education Programs*
* Most recent institution and academic program self-studies
* Read most recent progress report (actions) from your institution and academic program

*Additional Readings (TBD)*

*Assessments (TBD)*

*Suggested Content Experts (TBD)*

* Peter Ewell – outcomes assessment component

**Curriculum Design and Timeline**

*Application process*

* Participant applications due December 1, 2010
  + Applicant requires Dean’s/supervisor’s support
* Need to create an oversight group to review applications, outcomes assessment, program curriculum, program policies and procedures
  + Identify dedicated point person/APTA staff and/or other consultant to work with the Oversight Group
* Review applications January 2011
* Notify applicants about their acceptance to ELI based on oversight group review of applications and status decisions – February/March 2011

*Welcome* *to ELI* for 1st Cohort – July 1 program starts

* Videoconferencing welcome using available technology (visual provided of all of the participants)
* Compile demographic information about the cohort upon entry into ELI
* Compile baseline data about applicants to include information prior to ELI
  + Consult with Sharon McDade regarding assessments and information that is included prior to program entry
* Pair participants with mentors/facilitators by cohort or subset of the cohort
* Provide for cyber networking of the cohort through discussion boards and Share Point or other mechanisms

*Course On-line Modules and Assignments to be Completed (July 1 – September 2011)*

* Personal Leadership and Management (Part I)
  + Self-assessments
  + Electronic documents
* Higher Education, Health Care, and Society
* Institutional Leadership and Management (Part II)

*First Face-to-Face Meeting at ELC for 1.5 days (Early October 2011)*

* *Integration of concepts based on modules completed July 1 – September 2011*
* *Use of case studies, real life problems, use of mentors/facilitators and content experts*
* *Participant networking*
* *Consult on projects for the academic institution – shared discussion and feedback*

*Course On-line Modules and Assignments to be Completed (October – January 2012)*

* Resource/Financial Management
* Legal Issues
* Student Affairs
* Human Resource Management

*Bring cohort together voluntarily at CSM for a short meeting (~2 hours) with mentors (February 2012)*

*2nd Face-to-Face Meeting (2 day) – (early March 2012)*

* *Integration of concepts based on modules completed October 2011 – February 2012*
* *Use of case studies, real life problems, use of mentors/facilitators and content experts*
* *Participant networking*
* *Consult on projects for the academic institution – shared discussion and feedback*

*Course On-line Modules and Assignments to be Completed (April – June 2012)*

* External Relationships/Partnerships
* Program Development and Outcomes Assessment
* Comprehensive integrated cases
* Capstone – dissemination of appropriate nature (institution)
* Final participant surveys

*Bring cohort together voluntarily at Annual Conference for a short meeting (~2 hours) with mentors (June 2012)*

*3rd Face-to-Face Meeting (2 day) (July 2012)*

* *Integration of concepts based on modules completed April – June 2012*
* *Use of case studies, real life problems, use of mentors/facilitators and content experts*
* *Participant networking*
* *Consult on projects for the academic institution to move to completion – shared discussion and feedback*

*4th Face-to-Face Meeting ELC (October 2012)*

* 1st Cohort – ~2 hour voluntary meeting
  + Share completion of academic institution projects with the 2nd Cohort (new)
  + Provide poster presentation, where feasible, at ELC as a part of scholarship
  + Provide for a recognition ceremony for ELI graduates on Friday evening with 2nd Cohort (new) in attendance
  + Recognize and award ELI pins for graduates
  + Provide in the future an alumni event for prior ELI graduates
  + Consider Education Section providing reduced/free registration (in-kind contribution) for ELI graduates as co-sponsors
* 2nd Cohort (new) – 1st meeting for 1.5 days as ELC preconference
  + Welcome to 2nd new cohort and meet ELI graduates group
  + Assign and meet facilitators/mentors

Delivery of Course Content (methodologies)

* Use of *online and low cost technology* to include power point without professional narration, reading assignments and links to articles, reflective questions, assignments to be completed by the participant
* Provide a cohort *discussion board* for networking, posing questions, ability of faculty to clarify concepts and stimulate discussion
* Provide a standard look to ELI online courses (prototype) for authors Course Authors
* Use of *content experts outside of physical therapy* to teach the online courses to increase program attractiveness and expand knowledge base of physical therapy academic administrators
  + Course content experts available during face-to-face meetings when participants are discussing, applying, and integrating their respective content
* Use of facilitators/mentors throughout ELI (cyber mentoring and face-to-face mentoring)
  + Develop a position description for facilitators/mentors with clear expectations for their role and responsibilities
  + Facilitators/mentors to be identified within physical therapy
  + Co-mentors with PT and PTA program director mentor pool

Meeting Dates for Steering Committee for ELI - 2010

**January 28-29, 2010 (Mallon Room)**

*Agenda Items for Inclusion*

* Development of application criteria to ELI
* Identify potential external content experts to develop course content
* Develop position description and attributes of mentors/facilitators (PT and PTA)
* Develop course outline for four face-to-face meetings
  + Identify additional resources needed (e.g., real case situations, networking, simulations and role play, other experiential activities, time for mentoring, outcome project, leadership development plan, etc)
* Budget implications
  + 9 low tech courses (Jody to follow up with Professional Development on costs)
  + External faculty content experts course development costs
* Potential locations for face-to-face meetings
* *Provide Interim Board of Directors Report for March Board Meeting*
  + Update of the work completed to date and anticipated timeline for implementation
  + Budget considerations for the 2011 budget

**July 12-13, 2010 (Mallon Room)**

*Agenda Items for Inclusion*

* Create a prototype for the format/design for online courses (low tech)
* Refine face-to-face meeting course outline, faculty, facilitators/mentors
* Recruit facilitators/mentors for ELI
* Number of pages of reading that should be allowed per course
* Budget implications for 2011 with the launch of ELI
* Timeline for course completion and review of materials prior to ELI launch
* Develop Guide for Mentors/Facilitators
* Develop promotional materials for inviting the first cohort to apply to ELI
  + Where and how should this be promoted?
* Develop Program Assessment for ELI (participant, program, profession) – Invite Sharon McDade to provided assistance in helping to develop these assessment instruments
* *Provide Final Report to Board of Directors with Recommendations*
* Recommend the establishment of an oversight group for ELI

**Steering Committee Assignments Due By January 8, 2010**

1. Contact Dr Sharon McDade at GWU about program assessments used at ELAM and willingness to work with this group – Margaret Plack
2. Draft summary of the group’s work to be reviewed by the Steering Committee and subsequently shared at CSM with AASIG, Education Section, and PTA SIG, and Education Strategic Plan Update for CSM (Jody)
   * AASIG Update – Mike Pagliarulo
   * PTA SIG Update – Susan Nelson
   * Education Section Update – Mike Pagliarulo
   * Education Strategic Plan Update on Initiative – Jody
   * Weekly APTA Board of Directors brief meeting update (11/2/09 completed)
3. Discuss with staff in Professional Development costs associated with online technology for course content development to include content expertise consultant fees, use of APTA technology (low tech), and curriculum and instructional design (Jody)
4. Review minutes to identify and provide the following: (ALL REVIEW AND COMMENT)
   * *Gaps* in course content and content to be added
   * *Differentiate outcome objectives and course content associated with Personal Leadership and Management (I) versus Institutional Leadership and Management (II); Add any content or objectives that are missing for these two courses*
   * *Duplication* of content that could be assigned to only one course
   * *Curriculum content that intentionally should overlap or is related to previous course content* for the participant to be able to apply and integrate concepts
     + Need to identify where course content should intersect to form a threaded curriculum to be further connected during face-to-face meetings
5. Provide citations for required and additional readings associated with each course (ALL REVIEW AND COMMENT)