

# CHARTING YOUR COURSE

AUCD TOOLKIT

A Toolkit for New  
Directors of University  
Centers for Excellence  
in Developmental  
Disabilities (UCEDD)



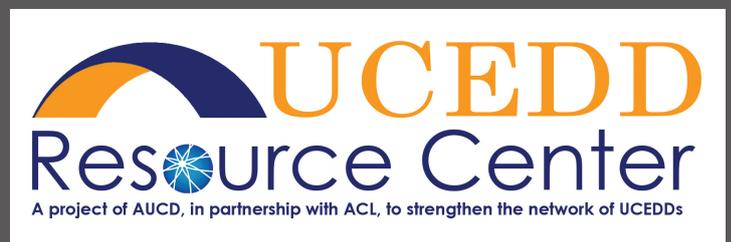
AUCD

ASSOCIATION OF UNIVERSITY CENTERS ON DISABILITIES  
THE LEADERSHIP, EDUCATION, ADVOCACY & RESEARCH NETWORK

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# Introduction

This toolkit contains a series of concepts and exercises designed to help early stage UCEDD directors begin well in their roles. This toolkit is a complementary resource to the AUCD's UCEDD Resource Center (URC). The URC contains a treasure trove of resources for UCEDD Directors to learn and grow in their leadership. Most of the available resources provide guidance on many of the technical and regulatory issues related to the work of the UCEDD. This toolkit is designed to provide concepts, frameworks and tools that build that capacity of UCEDD directors for organizational and systems leadership.

You may engage this resource as a learning journey or as a set of stand-alone exercises. These concepts and exercises can build on one another. However, you may also want apply a particular tool or framework, apart from other concepts and exercises, to a specific issue or challenge in your work. The modules contain exercises and questions that can be used for group discussion, stakeholder conversations, staff planning sessions, and individual reflection.

# This Toolkit Has 3 Sections

## 1 Self-Reflection

**Self-reflection is the practice of assessing one's thinking, feeling and behavior.** It requires a combination of honesty and grace to take stock of one's strengths and growth areas. For leaders who desire to learn and grow, it is an ongoing discipline that is never finished.

This section includes three modules that invite you to engage in this important practice:

### Three Modules

- I. Personal Reflection on Motivation
- II. Mental Models of Leadership
- III. Leadership Strengths

## 2 Getting Oriented to My UCEDD

UCEDDs are ecosystems that require a director to manage a complex network of relationships and competing priorities. Effective leadership in this environment requires a director to identify and understand the relationships between the diverse elements of the UCEDD's ecosystem. This awareness enables leaders to make decisions with attention to how an intervention in one part impacts other elements and the whole. This section provides a set of concepts and tools that help UCEDD directors gain insight into the UCEDD's key elements, including organizational history, staff functions, stakeholder relationships and organizational culture.

There are five modules in this section:

- I. The Story of My UCEDD
- II. The Status of My UCEDD
- III. Mapping the UCEDD's Core Functions
- IV. Mapping Stakeholder Engagement
- V. Understanding the Culture

# 3 Tips for Visioning and Strategy

**Strategy is a map of a path toward a desired future based on our best knowledge of a situation at a given moment.** That desired future is a vision of change rooted in shared ideals and values. Good strategy envisions and pursues this future with a deep empathic understanding of the needs and desires of the constituents you hope to serve. It requires a team to marshal its powers of learning and problem solving to pursue a desired future while responding productively to unforeseen obstacles. It is more like a muscle than a set of documented plans. To help build this muscle, this section offers a set of tips and tools to help you envision and enact the change you hope to lead through your UCEDD.

There are three modules in this section:

## Three Modules

- I. Envisioning Change
- II. Practicing Human Centered Design
- III. Tips for Developing a Strategy

## RESOURCE

The URC Resource Map provides a bank of tools and resources on core functions of UCEDDs and federal requirements for the UCEDD grant program. Resources in this menu include webinars, guides, training, and other tools addressing UCEDD core functions, administration, operations and other key priorities.

Follow this [LINK](#) to access the Resource Map.

# “A TANGLED WEB”:

## A STORY OF A NEW UCEDD DIRECTOR

This case is a fictional composite sketch adapted from the real stories of new UCEDD directors.

Dr. Karen Smith was excited to begin in her role as Director of the University Center for Excellence in Developmental Disabilities at the University of the United States.

Both her faculty appointment and the UCEDD were located in the School of Education. The former director was a beloved figure in the university, community, and the UCEDD. Karen knew she would be leading a staff that was loyal to the former director. They were grieving his departure and they were somewhat skeptical about her prospects as the new director.

Advised by wise and experienced UCEDD directors in the AUCD network, Dr. Smith started her tenure by asking questions of the staff, board members, and other stakeholders to better understand the culture of the center and determine how she might make a positive impact. After about two months of listening through interviews and one on one conversations, she used software to analyze the interviews and code the themes. Her data-driven reflection on these themes helped her set goals for herself and her leadership in this new role.

“

Often times we find ourselves in challenging situations with obstacles constantly obstructing our paths. The key is to have the tools to navigate this new terrain.

”

In a review of the programs of the UCEDD Karen noticed that there seemed to be no logic holding all of these initiatives together. It appeared to be a “hodge-podge” of programs loosely fit together within the UCEDD’s structure.

She asked senior staff about how these programs were initiated. She came to realize that they were each added to the UCEDD’s portfolio in an ad-hoc way. When the former director saw opportunities for funding he pursued them to ensure consistent funding streams for the UCEDD. Over time this pattern created mission drift. There was no cohesive sense of vision or mission tying together the program staff or their work. As a result, the staff tended to work in silos, based on the program area to which they were assigned. They had also developed deep affection for these disparate areas of work.

During her first 60 days, Dr. Smith also conducted a review of the faculty and staff's annual performance evaluations and professional goals for the coming year.

The performance evaluation process appeared to be highly subjective and inconsistent. During that review it also became apparent that some staff members have not made significant contributions to the mission. In fact, she could see that some staff members were in roles for which they were clearly unqualified. The only conclusion Karen could make was that the former director retained them because of personal loyalty. In some cases, she realized, the former director tended to make personnel decisions based on personal relationship rather than performance. While there are many individuals who were demonstrating excellence in teaching, research and service, there were corners of mediocrity in the UCEDD that represented a poor use of the organization's resources and had a negative impact on staff morale.

## Then came the game plan.

She knew that personnel issues and mission drift would take a while to address. So, she decided to start with small predictable wins. To begin, she decided to take on what appeared to be the low hanging fruit, the things everyone said they wanted to change or improve.

**One seemingly simple issue was internal staff communication.** Almost every person on her team reported that they felt disconnected from other team members. They felt like they had no idea what was happening beyond their siloed program area.

This seemed to be an easy fix. To address this, Karen changed the way monthly staff meetings were conducted. In the past, the agenda for staff meetings had been prepared unilaterally by the former director. These hour-long meetings were typically a monologue with little contribution from the team. Karen decided to share the leadership of staff meetings and invite the team to help set and lead the agenda. For the first three months, no one provided any content for the agenda nor did they volunteer to help lead the meetings.

This was just one of a few changes that were surprisingly difficult. **When she began making some of these low-stakes changes she ran into some unexpected resistance, sometimes from the very people that had suggested those changes.** She couldn't figure out why she was running into overt and passive resistance seemingly at every turn. She came to learn that some of the staff members interpreted her questions and efforts toward change as criticism of their beloved former director. Sometimes they would even say aloud to her, "Jim [the former director] would have never done that." While they were quick to volunteer ideas for change, a subset of the staff did not trust her to implement that change. A small group of staff often relayed information about prospective changes to the former director, Jim, with whom they were still in consistent contact. If he expressed any doubt or disappointment about a change he let them know. They tended to base their response to a proposal for change on whether the former director approved. She began to notice the development of a faction that consistently resisted small and large efforts toward change.

**Dr. Smith began walking on eggshells, unaware of when and where she might encounter resistance. Something had to be done, but she was at a loss for what to do about it.**

WHAT ADVICE WOULD YOU OFFER  
TO KAREN?

# ADVICE FROM CURRENT UCEDD DIRECTORS

The job of a UCEDD Director requires one to manage a complex set of relationships and priorities. AUCD recently asked current UCEDD Directors to offer words of advice to new UCEDD directors entering this unique role.

**Here are some of their responses compiled by category:**

## Engaging the AUCD Team and UCEDD Network

READ! Use resources online at AUCD's UCEDD Resource Center.

Actively utilize the tremendous network of experts who exist throughout the network. It is an extremely talented group who are very willing to share.

Phone a friend! Find a UCEDD Director friend that you trust and talk to regularly in the first few years. Prioritize a regular conversation monthly, sacred time.

Study the UCEDD websites. Find three that have attributes you would like to know more about and visit them in-person using core funds.

Build strong relationships with other UCEDDs and create opportunities for internal relationship-building and project development.

Introduce yourself to other Directors at the AUCD Conference, review their websites, and try to make a few visits to neighboring UCEDDs. Ask for TA, and utilize AUCD resources!

Help the Dean/ Vice President understand what the UCEDD does. Consider inviting them to AUCD's Conference.

Take advantage of the wonderful AUCD network resources- including the staff!

Use AUCD's resources/ technical assistance/ peer advice to get support and advice for any issues/ questions that arise— especially with NIRS, reporting, etc. They are helpful and great!

## Relationship Building

Embrace your relationship with others.

Make connections and establish relationships outside the UCEDD and typical “comfort zone.”

Build solid relationships inside and outside your host university.

Seek to find a balance between getting to know your staff and connecting with your external constituents.



## Management

Try to spend some time with really good support to understand the finances of your center.

Be transparent with as many processes as possible.

Attempt to create a “horizontal” organization structure to build capacity across your organization and encourage creativity and joint ownership of challenges and successes.

Don't have your plate be so full you can't take time to be a good manager.

Work closely with business office/ sponsored programs unit on budget allocation and justification.

Meet with the exiting Director to understand ALL the challenges that exist in the organization- threats/ potential threats/ allies and individuals that can support and mentor success.



## Team and Staffing

Interview each key staff person to understand strengths and build teams accordingly.

Trust and encourage your personnel and partners to share leadership with you. You do not (cannot) accomplish it all alone. Set high expectations and support and grow your personnel so you have a strong and engaged team.

Meet with all staff and build an understanding of who they are- their strengths, interests and ideas.

Be willing to listen to ideas from staff while also being prepared for resistance to change. Make sure your staff team has your back.

Have a sit-down meeting with every single staff person and ask:

- What do you do?
- What do you need from me?
- What do you think I need to know about your job?



## Navigating the University and Larger Ecosystem

Address navigation issues associated with location within university and medical school structures.

Meet with state and university partners to build an understanding of who they are—strengths, interests, and ideas.

Get support from your institution;  
Funding for the Director;  
Decent share of indirect costs;  
Anything else is good!

Be clear on concrete ways the university will support the efforts of the UCEDD: financing, salary coverage, F&A support, university appointments, integration into university/ college/ departmental structures.

Use this opportunity (your arrival) to increase visibility of your center at the university.

Find out the “land mines” to avoid in your center and state.

Make friends with the director of HR on your campus before you need him/her (and you will).

Work closely with business office/ sponsored programs unit on budget allocation and justification.

Make sure you know where you sit in the university and how your center’s work aligns with the university strategic plan.

## Leading Change

Push the limits-  
make a change from  
the status quo!!!

Give yourself time  
and look at progress  
1-5 years out.  
Organizational and  
cultural change takes  
time.

What resources will  
you need? Should  
you consider?

How do you lay that  
out?

Ensure you have the  
space to lead without  
undue influence  
of the past leader's  
vision and "ways."

Question the  
status quo.

Focus efforts on  
transformational  
leadership tasks  
despite the never  
ending and louder  
call to respond to  
transactional tasks.

Think about using  
some UCEDD funds to  
support new initiatives  
(e.g. seed funding).

Take the time to  
consider your shape  
of the center. Many  
UCEDDs have strong  
historical presence  
within a certain  
structure, processes, etc.  
That doesn't mean it has  
to stay that way.

Once you have taken  
that time and have the  
type of center in mind,  
think about: Will it  
require change? How  
much?

Also, think carefully  
about goals and  
objectives and ensure  
they are measurable  
and attainable.

## Leadership Practices and Values

The whole is more important than the parts- be rooted in civil rights and core values of the DD Act and make sure every project is based on those values.

Focus on making change for people with disabilities.

Set very clear boundaries with outgoing directors.

Know where you want to go but be flexible in how you will get there.

Have a focus or priority area so it's not entirely overwhelming!

It's not necessary always to follow rules! Find balance in your personal and professional life. Look for strengths, leverage strengths, and be grateful.

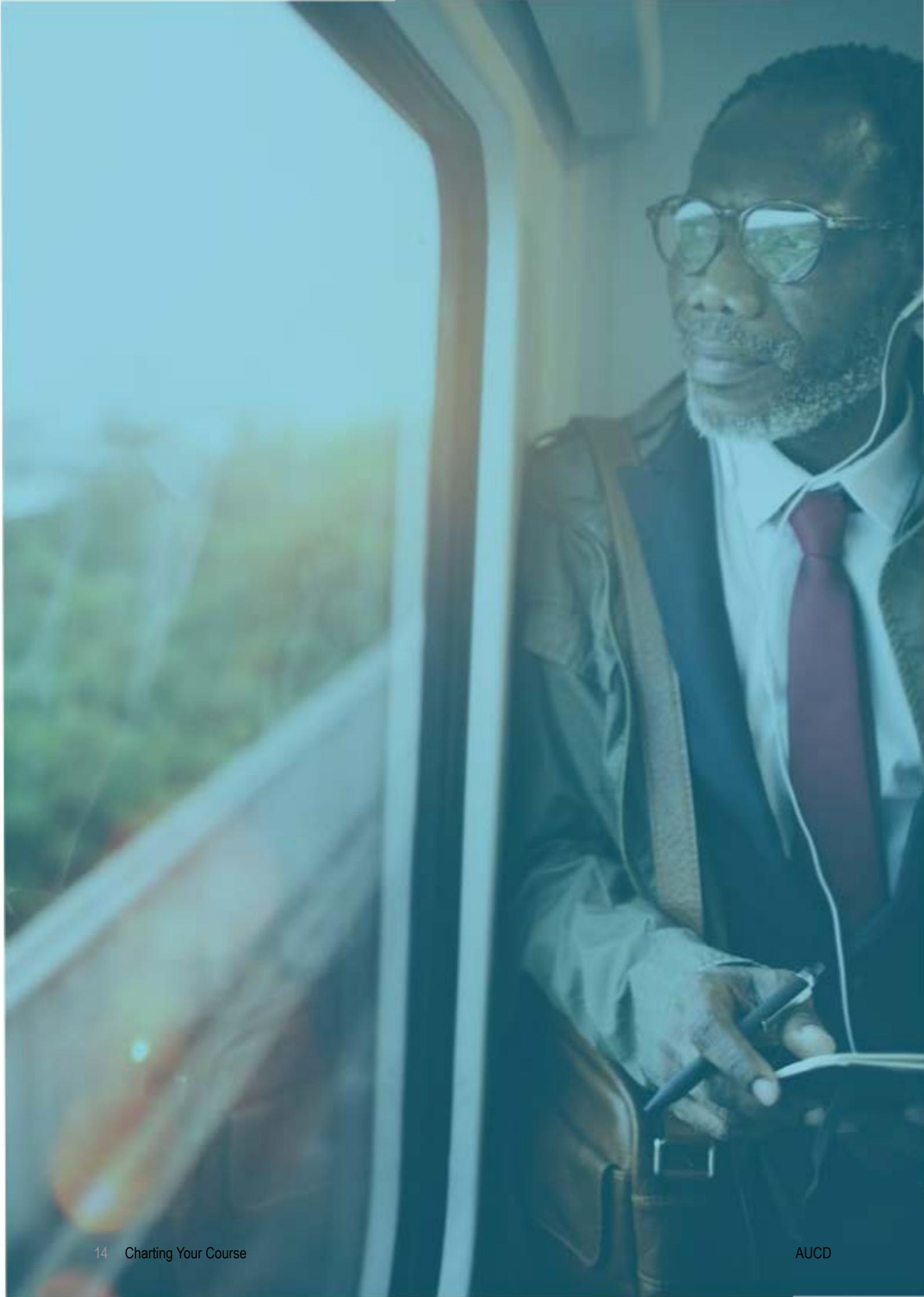
Define your niche and work within your strength and capacity areas. The scope is too broad and you will be pulled in a hundred directions.

There are a lot of surprises! Don't be shocked by all of the things you should have known but didn't.

Don't give up!

Appreciate and value your strengths and what you bring to the role. Try not to be intimidated by the network!

Your health comes first. Have a plan to reduce stress. It will make everything else okay.



# Self-Reflection

SELF-REF

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PERSONAL  
REFLECTION  
ON MOTIVATION

**.Q**  
MENTAL  
OF LEA

LECTION

2

MODELS  
LEADERSHIP

.03

LEADERSHIP  
STRENGTHS

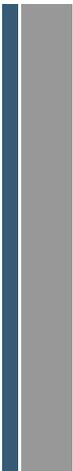
# Framing | Goals

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Self-reflection is a necessary practice for effective leaders.

This discipline provides leaders with an opportunity to pause amid the flurry of activity and incoming messages to gain perspective, recalibrate priorities, and tend to their emotional well-being. Self-reflection can be done in a variety of forms and methods including meditation, journaling, and storytelling. The ultimate benefit of self-reflection is increased self-awareness, which builds the capacity of leaders to align their values and actions. This congruence between who you are internally and what you do externally facilitates a greater sense of fulfillment in personal and professional life. It also fosters resilience in the face of challenging circumstances.

**This section offers three modules to support UCEDD directors in the practice of self-reflection.** If you choose to work through the entirety of this section, you will have explored concepts and exercises that help you:



**Examine the mental models that inform your values and practice of leadership,**

**Identify the motivations that drive your work as UCEDD Director, and**

**Reflect on the strengths and gifts you bring to your leadership role.**

# How to Use This Section

The three modules in this section may each be used as a stand-alone process.

You may also choose to allocate a half-day or more to work through the entire section at once. Here are a few suggestions for how you may engage this section:

Slow down and allow yourself time to reflect.

Set aside 30 focused minutes at the beginning or end of your work day to work through one module.

Use the questions in each section as prompts for journaling or conversations with a professional coach.

Schedule a periodic (biannual, quarterly) personal retreat in which you iteratively return to these modules. This may help you keep track of changes in your thinking over time.

Invite a small trusted group of peers to go through this process with you. Reflect together on what you're discovering through the exploration of your mental models, motivations, gifts and strengths.

Have fun and feel free to get creative.

Just know that you will have to allocate time to this too-often-neglected practice of self-reflection.

## MODULE 1: PERSONAL REFLECTION ON MOTIVATION

**Reflection Question #1:** What is at stake for you if the UCEDD succeeds or fails in the fulfillment of its mission?

[section for written reflection]

**Reflection Question #2:** How does the UCEDD's mission align with your personal sense of passion and purpose? Why does this matter to you?

[section for written reflection]

## MODULE 2: MENTAL MODELS OF LEADERSHIP

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“Mental models are deeply held internal images of how the world works, images that limit us to familiar ways of thinking and acting. Very often, we are not consciously aware of our mental models or the effects they have on our behavior”- Peter Senge (The Fifth Discipline, 1990)

”

**Mental models are the unseen forces that shape our thinking and action.**

Reflective leaders constantly seek to lift their unseen assumptions and ideas to conscious awareness. This practice enables us to examine our “internal images of how the world works” and determine whether they are helpful. Often our mental models are based on past experiences that no longer represent the current reality. Consistent reflection on our mental models of leadership can help us learn how well our leadership style and processes fit the current context in which we are leading. For a UCEDD undergoing a leadership transition, this practice may help a staff begin to identify and put aside outdated models that no longer serve the UCEDD.

## Exercise: Mental Models of Leadership

Many of our mental models of leadership are derived from experiences with leaders who have made an impression on our lives, either positively or negatively. This exercise invites you to reflect on the leaders that have impacted you. Note: For this exercise, use examples of leaders with whom you have had a personal or professional relationship.

**Name two leaders who exemplify your ideals of leadership.**

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**Name two leaders whose leadership you DO NOT want to emulate.**

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**Think back to a time when you saw them face a leadership challenge. How did they handle it? What qualities did you admire in their leadership? What qualities did you not admire?**

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**How do their examples (both positive and negative) inform your ideals of leadership?**

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**What do your responses to the above questions suggest about the kind of leadership you want to embody in your role as UCEDD director?**

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## MODULE 3: LEADERSHIP STRENGTHS

**Personality profiles are a useful tool to enhance self-awareness.** They offer frameworks that help us understand our unique perspectives and behavioral patterns.

The VIA Character Strengths Survey is a psychometrically validated personality test that measures an individual's character strengths. The survey assesses the unique way that twenty-four character strengths show up in each person. They provide a clue as to what kind of environments, dynamics and tasks support our well-being. Character strengths are viewed as our positive personality in that they are our core capacities for thinking, feeling, and behaving in ways that can bring benefit to us and others<sup>1</sup>.

**While the VIA survey enhances self-awareness, it may also help you understand the perspectives and behavioral patterns of your staff and colleagues.**

Consider inviting your staff to complete the survey and reflect together on what they learn about themselves and each other. When colleagues understand one another's strengths (and how they show up) they may develop newfound empathy and patience. As a manager, it may also help you create conditions for your team to do their best work.

Take the free survey at this [LINK](#).

When you have received your results, return to this module to reflect on your strengths profile.

**Tip:** Character strengths reflect who you are at your core.

They are not an assessment of strengths and weaknesses. So, resist the urge to think of your lesser strengths as weaknesses. They are still a part of your strength profile. Your signature strengths are a clue to help you identify the types of environments and conditions that enable you to thrive.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

<sup>1</sup> from the description of the VIA Character Strengths Survey at the VIA Institute on Character. Accessed May 19, 2019. <http://www.viacharacter.org/>

How do your signature strengths show up in your leadership?

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List the 5-7 members of your staff with whom you work most closely.  
What character strengths do you notice in them?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.



**TIP:** This strengths assessment can be helpful for team building. Your lesser strengths may be signature strengths for another member of your team.

**Reflection Question #1: Review the 24 character strengths.**

What are the top 10 character strengths that your team needs to demonstrate to make the kind of impact you envision? Which of these are your signature strengths?

[section for written reflection]

**Reflection Question #2: What are the strengths among your team that ought to be recognized and fostered to create conditions for success?**

[section for written reflection]

**Reflection Question #3: What other personality profiles have you taken?**

(StrengthsFinder, Enneagram, Myers-Briggs, etc.) What have they reflected back to you about your leadership style? How do those profiles relate to what you have learned about your strengths through the VIA character strengths survey?

[section for written reflection]



# Getting Oriented





## GETTING ORIENTED



“A UCEDD Leader influences, promotes and moves individuals, practices and policies toward the achievement of the ADA and DD Act vision of full participation, integration of all people with disabilities into the social and economic fabric of our society.”

-George Jesien, PhD  
AUCD

# TO YOUR UCEDD

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# Framing | Goals

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Getting oriented to the role of director requires you to develop an awareness of the structural, cultural and relational aspects of your UCEDD.

Both new directors who are also new to their UCEDDs and new directors who have some history with their UCEDD or university have peculiar advantages and encounter unique challenges when entering their roles. For directors who rise to leadership from the ranks of the staff or university, there may be some aspects of the context that you know well. However, you may also find it difficult to adjust your relationship to colleagues who have known you as a peer.

For new directors who are also new to the UCEDD, your learning curve may be steep. Building new relationships while learning the landscape of a complex organizational environment can be daunting. However, newness also has its advantages. You may be able to ask probing questions that would otherwise be seen as threatening from a longstanding colleague. With a fresh perspective you may also be able to see aspects of the organizational culture that a veteran colleague would no longer notice. In either case, orientation to this role requires a new director to “learn the system”, both in its visible and less apparent dimensions.

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This section offers a series of modules that can help a new director learn about their UCEDD. These concepts and exercises provide tools that will help you:

**Learn and articulate the history of your UCEDD**

**Assess the usefulness of your UCEDD's programmatic activities**

**Map the internal (staff) landscape in your UCEDD**

**Review the relationship of your UCEDD to your stakeholders, and**

**Gain insight into the culture of your UCEDD**

# How to Use This Section

There are five modules in this section. As a new director you may find it helpful to use these modules for personal reflection on your work in the UCEDD. However, these exercises will yield the best results when used in a group setting with your staff and/or constituents.

**Here are a few ways you might use the modules in this section:**

Use one module to stimulate group reflection during a staff meeting

Work through all five modules in a staff retreat

Use the team-derived results of these modules to orient new staff

Invite community and/or university partners to participate in an assessment process informed by one or more of these modules.

## MODULE #1: THE STORY OF MY UCEDD

**Entering the role of UCEDD director is like becoming a co-author of a story that is already being written.** In order to begin envisioning where and how you may lead your UCEDD, it is important to understand and narrate the story of the center prior to your leadership.

**Every UCEDD has a unique story.** These stories consist of a series of events, patterns and unexpected turns that produce a trajectory over time. This module invites you to plot the story of your UCEDD on a timeline. This will enable you and your team to gain a “long view” of your center. In a group setting, it may also help build a shared understanding of certain programs or patterns in the UCEDD.

# Group Exercise

## STEP 1

On a chalkboard, whiteboard or flipchart, draw a straight line from one end of the surface to the other. On the left end write the year your UCEDD was established. On the right end write the current year. Mark a series of tick marks along the line to indicate the passing of time (Example: 1 mark = 5 or 10 years).

## STEP 2

Invite the group to brainstorm and list the significant events, people, pivotal decisions, and historical landmarks that have shaped the UCEDD since its inception.

## STEP 3

Use markers and/or post it notes to place the significant events, people, pivotal decisions, and historical landmarks on the timeline. Use one post-it note per item.

## STEP 4

When all of the items have been placed invite the group to take a moment to review the timeline

## STEP 5

Engage the group in discussion about what they notice. Here are a few questions that may stimulate conversation:

- Where are the clusters on the timeline?
- Where are the gaps in our memory?
- What patterns do we notice?
- Have we left anything out?

## Storytelling: An Optional Addendum

### STEP 6

(Optional): In small groups prepare to tell the story of your UCEDD, from its inception until now. Remember, every story is an interpretation of the meaning of facts, events, and situations. Here are a few tips to help you craft your story.

Be sure to tell a story. Think back to the great stories you've heard – they have a beginning, middle and an end. They also usually have a challenge at the core of them with the key element of overcoming or grappling with the challenge. Well-told stories have a plot, characters, conflict, history, emotion and descriptive language.

Think of your story topic and make some notes that may include: who is involved, the challenge we/they faced, what happened, where and when, and where we are now.

If you need to fill out facts or specific details to add richness to the story, call, text or email people who may help you tell a full, nuanced story.

Resist the impulse to use the story to make yourself or your UCEDD look good. Complex challenges sometimes result in learning from temporary failure. A good story can leave us with unresolved questions.

### STEP 7

(Optional): Each group take turns telling your story to the other group. Notice the differences in how the stories are crafted and told.

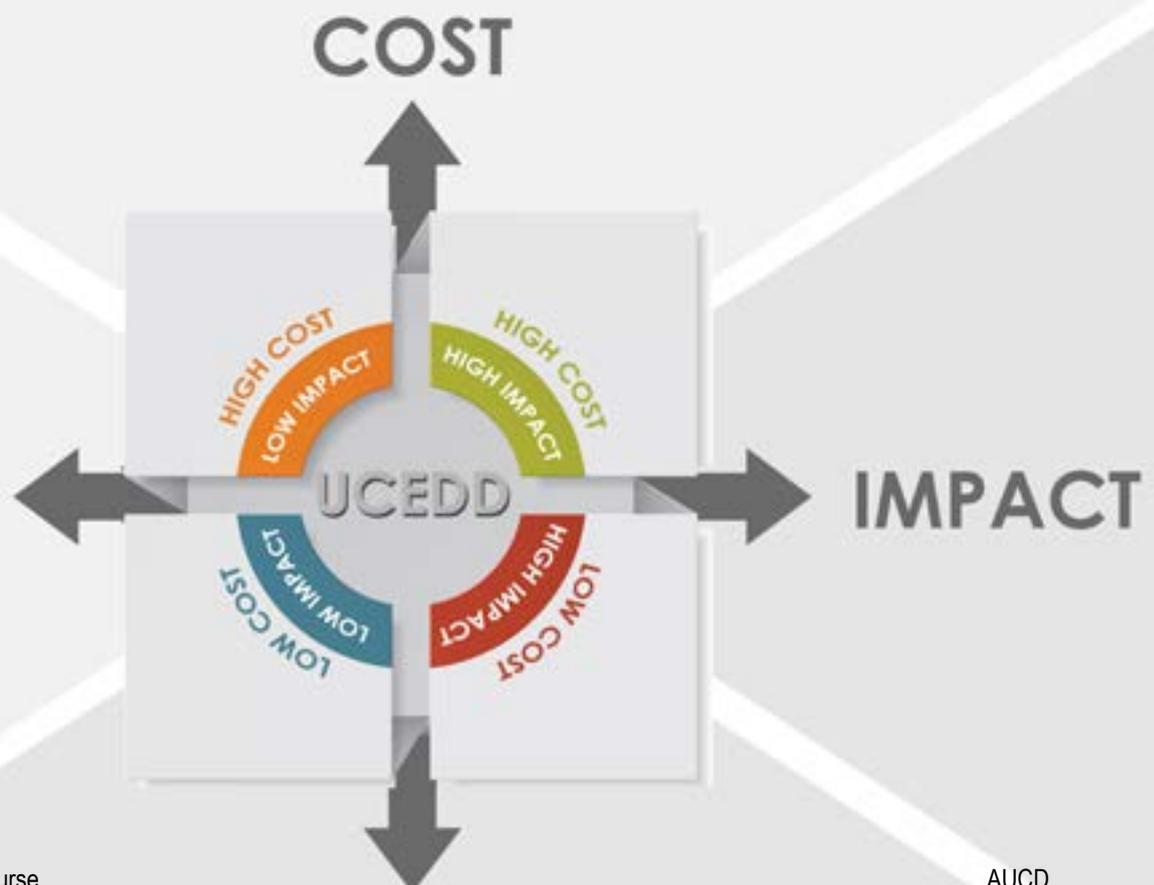
## MODULE #2: THE STATUS OF MY UCEDD

**One of the most important priorities for new directors is to assess the quality and effectiveness of existing programs and initiatives.**

What impact do you hope your programs will accomplish? Are your human and financial resources allocated to programs and initiatives that achieve the impact your UCEDD intends?

**This grid provides a framework with which you may assess your UCEDD's programs and initiatives.** In an ideal scenario, your UCEDD's programs will have a high impact, with the least possible cost in terms of human and financial resources. In the worst cases, your UCEDD will make a high investment of resources in programs and initiatives that yield low desired impact.

In a group setting use this grid to assess your UCEDD's programs in terms of cost (investment of human and financial resources) vs. desired impact.



# Group Exercise

## STEP 1

Draw a grid on a piece of paper, flip chart, chalkboard or whiteboard

## STEP 2

List your UCEDD's current programs.

## STEP 3

Use markers and/ or post-it notes to plot each one on the grid based on your team's assessment of the program. One program per post-it note.

## STEP 4

Step back and reflect together on what you notice. Here are a few questions to stimulate discussion:

- Which initiatives are making the most impact? Which initiatives are making the least impact?
- In what quadrant are most of our programs located?
- What programs might we need to redesign or let go?
- What does this suggest about the strengths of our UCEDD?
- What programs have we inherited? How might we renegotiate the agreements and relationships that no longer serve our mission? How might we strengthen the agreements and relationships that advance our mission?
- What might the UCEDD need to celebrate regarding its programmatic impact?



## MODULE 3: MAPPING THE UCEDD'S CORE FUNCTIONS

As a UCEDD director you manage and oversee a complex network of organizational priorities, functions and relationships both within and outside the UCEDD. Mapping can be a helpful tool to make sense of the UCEDD's web of relationships. This mapping exercise invites you to identify the individuals who play key roles in executing core functions within the UCEDD.

RESOURCE: “[The Perceptions of Past and Current UCEDD Directors on Transitioning in and out of the Role of UCEDD Director](#)”

# MAPPING THE UCEDD'S CORE FUNCTIONS

Name the three most impactful actors in each category related to your UCEDD

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



RESEARCH AND EVALUATION

TRAINING



1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

POLICY ANALYSIS AND EDUCATION



1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

LEVERAGING FUNDS



1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## CULTURAL & LINGUISTIC COMPETENCE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## STRATEGY



1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## COMMUNITY SERVICE



## OPERATIONS

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## UNIVERSITY RELATIONS

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## INFORMATION DISSEMINATION

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



Exercise: Who's Who? In each category name the three individuals, within the UCEDD and/or university who have the most impact on your UCEDD's core functions.

### Training

- 1.
- 2.
- 3.

### Research and Evaluation

- 1.
- 2.
- 3.

### Community Service

- 1.
- 2.
- 3.

### Operations

- 1.
- 2.
- 3.

### Strategy

- 1.
- 2.
- 3.

Tip: If you are new to this UCEDD it may be helpful to have others in the UCEDD complete this as and provide it to you as a resource for orientation. They may also provide introductions as needed and appropriate.

### Policy Analysis and Education

- 1.
- 2.
- 3.

### Leveraging Funds

- 1.
- 2.
- 3.

### University Relations

- 1.
- 2.
- 3.

### Cultural and Linguistic Competence

- 1.
- 2.
- 3.

### Information Dissemination

- 1.
- 2.
- 3.

After completing this mapping exercise, reflect on the following questions (either in a team setting or individually):

In which core functions is your UCEDD well resourced? Are there core functions that seem to be under resourced? What does this exercise suggest about your UCEDD's priorities?

What, if anything, does this exercise suggest about what core functions the UCEDD may need to strengthen?

In your UCEDD, do the key players in these functions operate collaboratively or in silos?



## MODULE 4: MAPPING STAKEHOLDER ENGAGEMENT

Your UCEDD's complex web of relationships includes an array of stakeholders beyond your core team. As a new director, it is important to understand who these constituents are and how the UCEDD relates to each of these stakeholders. This exercise is designed to help directors and their teams clarify the type of engagement the UCEDD maintains with various constituents. This process is likely to yield the best results if used with a team.

### **You may want to use this exercise for:**

- Developing strategy for partner engagement
- Identifying how to build relationships and with whom
- Engaging partners to ask how they see themselves in relationship to your UCEDD
- Assessing whether you have the right partners in the right places, and/or
- Identifying relationship gaps.

# MAPPING STAKEHOLDER ENGAGEMENT

How are you engaging multiple stakeholders in your ecosystem?

This map outlines a variety of types of relationships with stakeholders and constituents. Along the outer edge of the circle it tracks a continuum of stakeholder engagement: from connection, to accountability, to partnership. This continuum contains five segments that further describe the nature of the relationship between the UCEDD and its stakeholders.

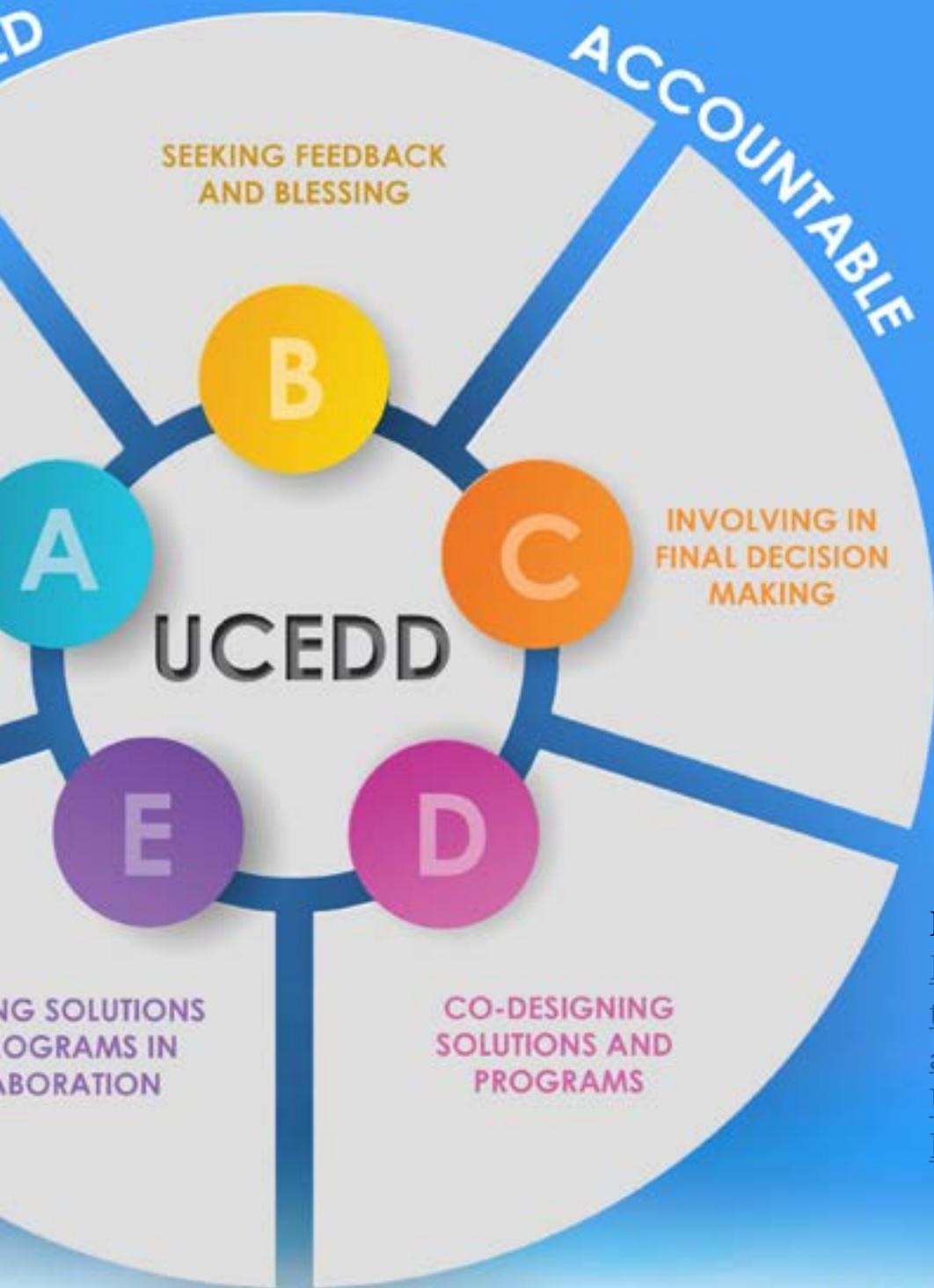
Locate each of the stakeholders above on this map

CONNECTED

INFORMING  
AND UPDATING

DELIVERING  
AND PROTECTING  
COLLABORATION





RESOURCE: [Seven Partner Values](#), created by the Center for Learning and Leadership at the University of Oklahoma Health Sciences Center.



**Informing and updating.** You periodically provide information and news about program developments. They are likely impacted by your work, but they are not very involved in it.

**Seeking feedback and blessing.** These stakeholders hold significant social and political capital in your web of relationships. You need their blessing in order for program initiatives to gain and sustain traction. They may not be doing the work, but you need their approval in order to get the work done.

**Involving in final decision making.** These stakeholders determine whether your UCEDD's initiatives have the funding and permission to proceed. They make decisions about allocation of human and financial resources to achieve organizational mission and vision.

**Co-designing solutions and programs.** The stakeholders are co-laborers with you and your UCEDD. They contribute human, intellectual and /or financial resources to the development of your UCEDD's initiatives.

**Delivering solutions and programs in collaboration.** These stakeholders may not have been a part of the research and/ or development of your initiative. However, they are necessary partners in the delivery of the solutions you deliver to your constituents.

Where a stakeholder lands on this map may depend on the nature of a project or situation. You may want to use this exercise to determine how to optimize engagement for a specific project. You may use this exercise for multiple types of projects and situations.

# Group Exercise

## STEP 1

In 3 minutes or less, invite your team to quickly list all of the stakeholders to which the UCEDD relates (e.g. State DD Council, local advocacy organization, university administration, etc.)

## STEP 2

Either print or redraw the blank stakeholder map on a whiteboard, chalkboard or flip chart to allow the team to contribute to this exercise.

## STEP 3

Locate each of the stakeholders listed on the stakeholder map.

## STEP 4

When all of the names of stakeholders have been placed invite the group to take a moment to review the map.

## STEP 5

Engage the group in discussion about what they notice. Here are a few specific questions that may stimulate conversation:

- To whom are we connected?
- To whom are we accountable?
- With whom are we partnered?
- How does our stakeholder engagement shape our programming?
- In what areas of engagement is our UCEDD strong?
- Are there areas of engagement we need to strengthen?

### **Here are a few additional questions for broader reflection:**

- What do you notice about your UCEDD's map of stakeholder engagement?
- What may need to change to facilitate partnerships that support your UCEDD's strategic direction?
- Who might you engage differently? Ideally, how would your relationship be different?

LEVELS OF ORGANIZATIONAL CULTURE

ARTIFACTS

ESPOUSED VALUES

SHARED ASSUMPTIONS

MY  
UCEDD

REA  
EV

TRA  
ME

# CHANGING THE CULTURE

**ACT**  
EVENTS AND  
OBSERVABLE DATA

What just happened?  
What did I observe?

**ANTICIPATE**  
TRENDS AND PATTERNS

Has this happened before?  
How did this emerge?

**DESIGN**  
SYSTEMS AND STRUCTURES

What are the underlying  
processes and practices  
that influence the  
patterns?

**TRANSFORM**  
MENTAL MODELS

What unexamined  
beliefs and assumptions  
keep this system in place?

ORGANIZATIONAL LEVERAGE POINTS



## MODULE 5: UNDERSTANDING THE CULTURE

“Culture eats strategy for breakfast, lunch, and dinner.”

- Peter Drucker

**The iceberg is a time-honored metaphor that describes organizational culture and behavior.** This model reveals that most of the forces that drive organizational culture and behavior are beneath the surface of visibility. An organization cannot be changed unless it can be understood at its core. The deeper levels of understanding beneath the surface provide insight into the inner workings of group culture and behavior. Understanding these deeper levels also gives leaders greater access to leverage points they may use to facilitate change.

**Sidebar Story:** Shortly after hiring a new vice president, the CEO asked the new VP to lunch. During their meal the CEO made a request. She said, “For the first six months of your time here, I need you to tell me all of the issues and dynamics you notice.” The VP asked in response, “Why only the first six months?” The CEO responded, “Because after six months you won’t notice them anymore.”

# Levels of Organizational Culture

## Artifacts

**Artifacts are the observable objects and behaviors that operate on the surface of the organization. They are the most visible elements of the organization.** Artifacts may include budgets, organizational charts, logos, office design, program structures, team processes and calendars. These surface level aspects of the organization are typically connected to deeper stories, relationships and dynamics that are impossible to understand at first glance. Any attempt to change artifacts without awareness of the deeper levels of the culture will likely result in conflict.

## Espoused Values

**Espoused values are the rules, ethics, and values that the organization expresses publicly.** They are expressions of ideals to which staff and stakeholders may be held accountable. Keywords like diversity, trust, respect, collaboration are often used to describe the shared set of ideals that an organization wants to project. In every culture there is a gap between espoused values and observable behavior. Any successful attempt to change surface level artifacts requires awareness of this gap.

## Shared Assumptions

**Shared assumptions are deeply embedded in the organizational culture.** These are the ways of seeing the work and the world that are understood as self-evident “givens”. Whereas espoused values are explicitly articulated, shared assumptions are tacit “theories in use” that drive unconscious behavior. This is the proverbial water that the fish swim in. The longer a person participates in the culture, the more difficult it is for them to recognize the shared assumptions that drive their behavior. New team members often see evidence of this deeper level of the culture in ways that veteran team members can no longer see. However, new team members tend to lack the social capital to publicly name what they notice at this level of the culture.

# Leverage Points for Organizational Change

This iceberg image also depicts four leverage points that leaders may engage to catalyze organizational change. Each of these points hold unique strengths and shortcomings for leading change.

## Events and Observable Data

**This refers to the episodes and experiences that raise our awareness of a challenge or problem.** When conflict emerges, this is the level that tends to occupy most of our attention. Here our attention is focused on making sense of what happened and what we observed. Flash points can be a powerful place from which one begins to organize people around a common cause or goal. However, if we only pay attention to episodes as they arise, we only gain leverage to REACT to events. This is the most visible but least transformative leverage point.

**Sidebar story:** In 1945, in Kalamazoo, Michigan, one of the first curb cuts in the U.S. was constructed in response to the advocacy of military veterans with physical disabilities.

## Trends and Patterns

**This is the domain of veteran team members. At this leverage point we begin to connect events over time to build a story.** That narrative may help us see a new episode in a longer series of events that suggest predictable trends and patterns. The people with organizational memory are the only ones who can make craft these narratives. Here we ask questions such as, “Has something like this happened before?”, or “How did this emerge over time?” This leverage point requires investigation below the surface or observable data and events. At best, it enables a group or a leader to ANTICIPATE the recurrence of a trend or pattern.

**Sidebar story:** This “first” brought to public attention a long history of neglect, discrimination, and inaccessibility in the United States.

## Systems and Structures

**At a deeper, less visible level of the organization are the systems and structures that generate the more visible trends, patterns, events and observable data.** This refers to the reflexive practices and processes that characterize the organization. Decision-making, budgeting, strategic planning and performance management practices are a few of the structural aspects of the organization at this level. These practices and process are typically inherited, unexamined and taken for granted. When leaders and team pay attention to this level of the organization, it better positions them to DESIGN the change they hope to see.

**Sidebar Story:** Urban planners, neighborhood designers, and architects learned and implemented methods that produced structures customized for non-disabled persons. Public spaces and structures were consistently made to be inaccessible for people with physical disabilities.

## Mental Models

**Mental models are deeply held beliefs about how the world works.** This is the unconscious source material from which we build relationships in our personal and professional lives. This is also the level of our organizations that is most resistant to change. This is true, in part, because it is the hardest aspect of our organizational life to name. However, when our mental models are named and examined, they become the basis from which we TRANSFORM our organizations.

**Sidebar Story:** In the 1940's people with disabilities were deemed inconvenient, inferior, and abnormal. Derogatory language about people with disabilities dominated public discourse. Curb cuts addressed the issue of accessibility in some public spaces. Later, the disability rights movement would address our shared perception of people with disabilities.

## Exercise 1: Stakeholder Interviews

Storytelling is one of the best ways you may begin to gain insight into the less visible aspects of your UCEDD and its ecology. Stories often reveal the depths of organizational culture. Below is an interviewing exercise you may use to learn more about the seen and unseen dimensions of your UCEDD.

# 5 STEPS

- 1** Choose 3 of the stakeholders listed above in your stakeholder engagement map.
- 2** Schedule an interview with each stakeholder.

**TIP:** When you request the interview, let the person know you are seeking to better understand the issues that are most important to your UCEDD's stakeholders. Send a series of questions in advance that they may consider.

- 3** Determine what you need to know to better understand the relationship between your UCEDD and this stakeholder.
- 4** Build 5-7 questions and story prompts for your interview. Make sure at least 2-3 of the items are story prompts. The best question for this kind of interview is open ended and invitational. For interviews, minimize questions whose answers you can find through research or documentation.

**Question Example:** How do you understand the relationship of your [insert type of organization] to [insert name of your UCEDD]?

**Tip:** Use the questions in the “organizational leverage points” section of the iceberg model to build questions.

**Story Example:** Tell me a story of an experience in which you were most frustrated in your relationship with [insert name of your UCEDD]?

**5** Conduct an interview with each of the three stakeholders you identified.

## Exercise 2: Mapping the Culture

This exercise is a companion to the interviewing process. The questions below invite you to apply the leverage points in the iceberg model to a story from your interviews. You may also use this framework to better understand your UCEDD’s culture in light of a challenging situation.

### Option 1

Choose one of the compelling stories from your interviews. Tip: Stories about conflict and problem solving are best to use for this exercise.

### Option 2

Choose an event or episode that posed a challenge for you and your team. Use this framework to explore what that situation may reveal about the deeper levels of your organizational culture.

Using the iceberg model, identify the leverage points this story reveals:

**List the key events and observable data named in the story.**

**What happened?**

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**Remember Karen’s Story:**

“The former director was a beloved figure in the university, community, and the UCEDD. Karen knew she would be leading a staff that was loyal to the former director. They were grieving his departure and they were somewhat skeptical about her prospects as the new director.”

“One seemingly simple issue was internal staff communication. Almost every person on her team reported that they felt disconnected from other team members. They felt like they had no idea what was happening beyond their siloed program area.”

What else did Karen notice in her early moments as UCEDD director?

**What trends or patterns did the story reveal?**

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**Remember Karen’s Story:**

“When she began making some of these low-stakes changes she ran into some unexpected resistance, sometimes from the very people that had suggested those changes. She couldn’t figure out why she was running into overt and passive resistance seemingly at every turn.”

What other patterns and trends did Karen encounter in her new role?

## What were the underlying practices and processes that contributed to those trends and patterns?

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### Remember Karen's Story:

“During her first 60 days, Dr. Smith also conducted a review of the faculty and staff’s annual performance evaluations and professional goals for the coming year. The performance evaluation process appeared to be highly subjective and inconsistent.”

The only conclusion Karen could make was that the former director retained them because of personal loyalty. In some cases, she realized, the former director tended to make personnel decisions based on personal relationship rather than performance.

How did these practices and processes contribute to the trends and patterns Karen observed?

## What are the unexamined assumptions and beliefs that underlie the structures, patterns and events described in the interview?

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### Remember Karen's Story:

The staff at Karen’s UCEDD had internalized a belief that the strength one’s personal relationship with the leader was more important than the shared mission of the UCEDD.

Jim, the former director, had established a culture in which he was revered as a benevolent monarch. He tended to “take care” of his staff, even to the detriment of the UCEDD’s mission. In return, the staff lavished the director with affection and loyalty.

Karen’s belief in shared leadership and open communication was in direct opposition to staff’s shared belief that the leader should make the decisions and tell others how to carry out the work of the UCEDD. Thus, the staff could not take responsibility for helping to solve the very problems they identified. The culture prohibited it.

What other unexamined assumptions and beliefs appear to be shaping the culture of Karen’s UCEDD?

## Reflection Questions

- What did you learn about the culture of your UCEDD in this process?
- What may need to change to better facilitate the fulfillment of your UCEDD's mission?
- What leverage points are you best positioned to use to foster that change?
- What allies may be located at other leverage points in the culture to support that change?





# Tips for Visioning and Strategy



# Framing | Goals

**This section reframes strategy as an ongoing process of reflection, assessment and adaptation.** This idea pushes against conventional notions of strategy as a set of plans we produce every 3 to 5 years. Here you'll find concepts, hints and tips for approaching the work of strategy in this unconventional way.

**Strategy can be simply described as the “process of turning what we have into what we need in order to achieve what we want.”** Strategic planning is a collaborative process that maps the movement of an organization from one set of conditions to another. It is important to remember that strategic planning is more than the development of a document that directs our activities. It is a practice that builds our collective capacity to adapt and act effectively in the face of the unknown.

Jim Collins describes strategic planning as a “mechanism for stimulating disciplined thought”, not a “rote exercise.” He writes: “... instead of being a rote exercise followed by rote implementation of decisions, effective planning involves vigorous debate, infused with the brutal facts and insight seeking, from which comes an iterative series of decisions that add up over time. It requires discipline and rigor.”<sup>2</sup>

This section contains two modules that offer an exercise and concepts that may inform your UCEDD's visioning and strategy development.

**These modules are designed to help you:**

Clarify the change you hope to lead in your UCEDD

Explore Human Centered Design methods to support the development of strategy

# Here are a few ways you may use this section:

Use concepts to invite staff members to envision an impactful future for your UCEDD.

Discuss key concepts with your staff and/ or board regarding visioning and strategy to develop shared language for a strategic planning process.

Apply a human centered design process to a specific project to build the UCEDD's capacity for design thinking.

Engage staff and partners in discussion groups to explore how these concepts may change their approaches to program planning and development.

For an overview of important considerations on strategic planning for UCEDDs, review the webinar, "Strategic Planning in a University Context."

Follow this [LINK](#) for the slide deck and audio recording of the webinar.

<sup>2</sup> Collins, Jim. "The Role of Strategic Planning as a Mechanism for Disciplined Thought." Jim Collins - Video/Audio - The Role of Strategic Planning as a Mechanism for Disciplined Thought. April 2, 2017. Accessed May 19, 2019. [https://www.jimcollins.com/media\\_topics/TheRoleOfStrategicPlanning.html](https://www.jimcollins.com/media_topics/TheRoleOfStrategicPlanning.html).

## MODULE 1: ENVISIONING CHANGE

This module invites you to begin envisioning the change you may lead during your tenure as director of your UCEDD. Lean into your imagination. Create a picture of a desirable future in which an individual, community, or constituency has been positively impacted by the work of the UCEDD under your leadership. Then unpack that picture and its implications for the work of leading change.

Describe the change you hope to see in your UCEDD as a result of your leadership. As you imagine the desired future for your center, what does that change look like?

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**Exercise:** With your description of this hopeful change in mind, complete the following exercise:

## Postcard from the Future

In 5 years, you will receive a postcard from a constituent. This person (could also be an organization or community) is writing to thank you for the impact your UCEDD has had on their life and work. Their “thank you” is a heartfelt reflection of the change you have helped to lead over the past five years.

Who is this constituent? An individual? An organization? A community?

How is their life and work different as a result of the work of your UCEDD?

What change in the UCEDD does this “thank you” reflect?

**Instruction:** Put yourself in this constituent’s shoes. Take an index card and write yourself this thank you note.

## Reflection Questions

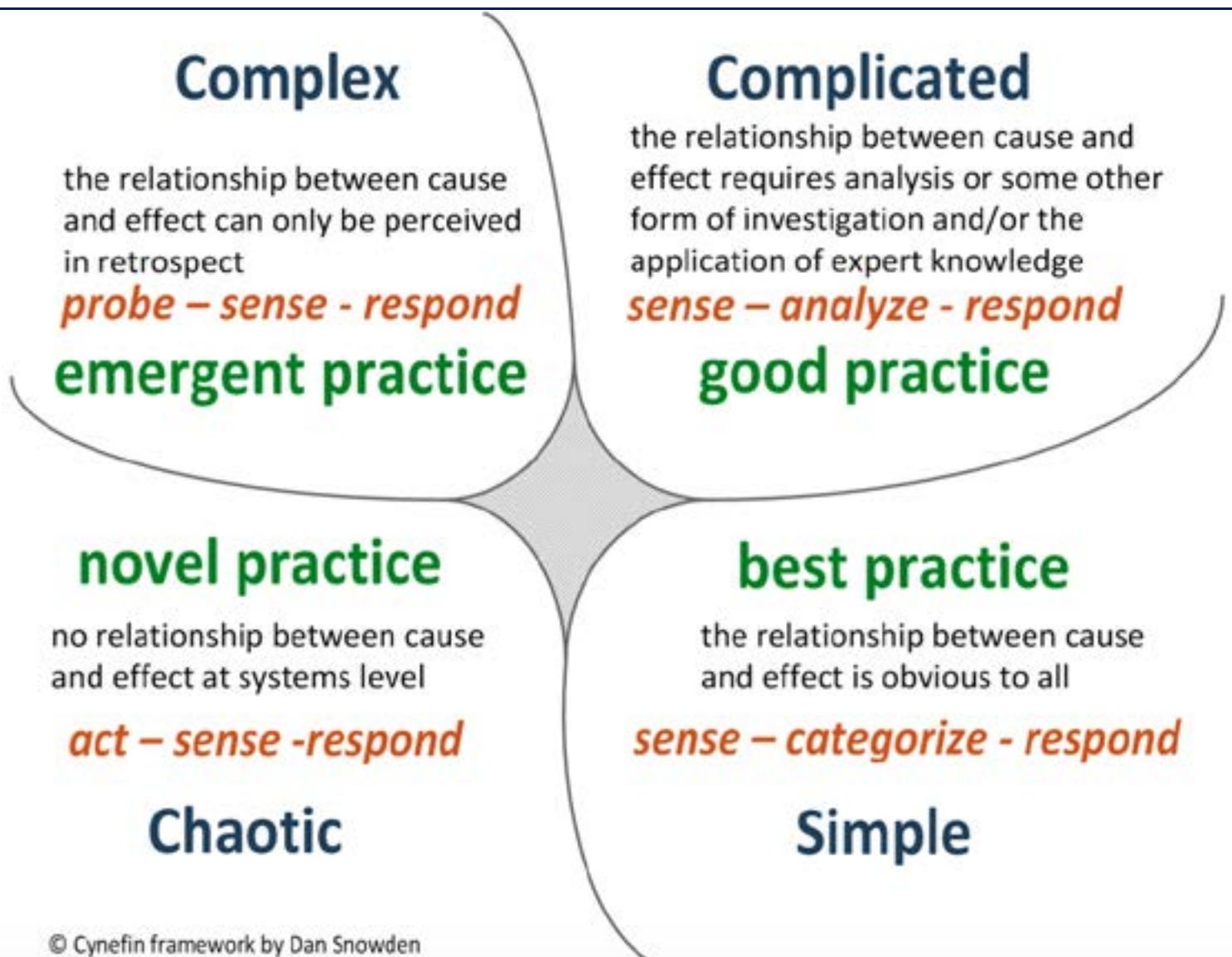
What would have to be different in order to make this vision a reality?

What would you have to do more of? Less of?

What would you and your UCEDD need to make this happen?

## Sidebar: What Kind of Change Are You Leading?

Would you describe the situation you hope to intervene as simple, complicated, complex or chaotic? Each type of situation requires a different approach to leadership and problem solving. The image below depicts the Cynefin framework, a model for categorizing situations that require solutions.



“(Cynefin, pronounced ku-nev-in, is a Welsh word that signifies the multiple factors in our environment and our experience that influence us in ways we can never understand.)”

“The framework sorts the issues facing leaders into five contexts defined by the nature of the relationship between cause and effect. Four of these—simple, complicated, complex, and chaotic—require leaders to diagnose situations and to act in contextually appropriate ways. The fifth—disorder—applies when it is unclear which of the other four contexts is predominant.”

“Using the Cynefin framework can help executives sense which context they are in so that they can not only make better decisions but also avoid the problems that arise when their preferred management style causes them to make mistakes.”

“Using this approach, leaders learn to define the framework with examples from their own organization’s history and scenarios of its possible future. This enhances communication and helps executives rapidly understand the context in which they are operating.”

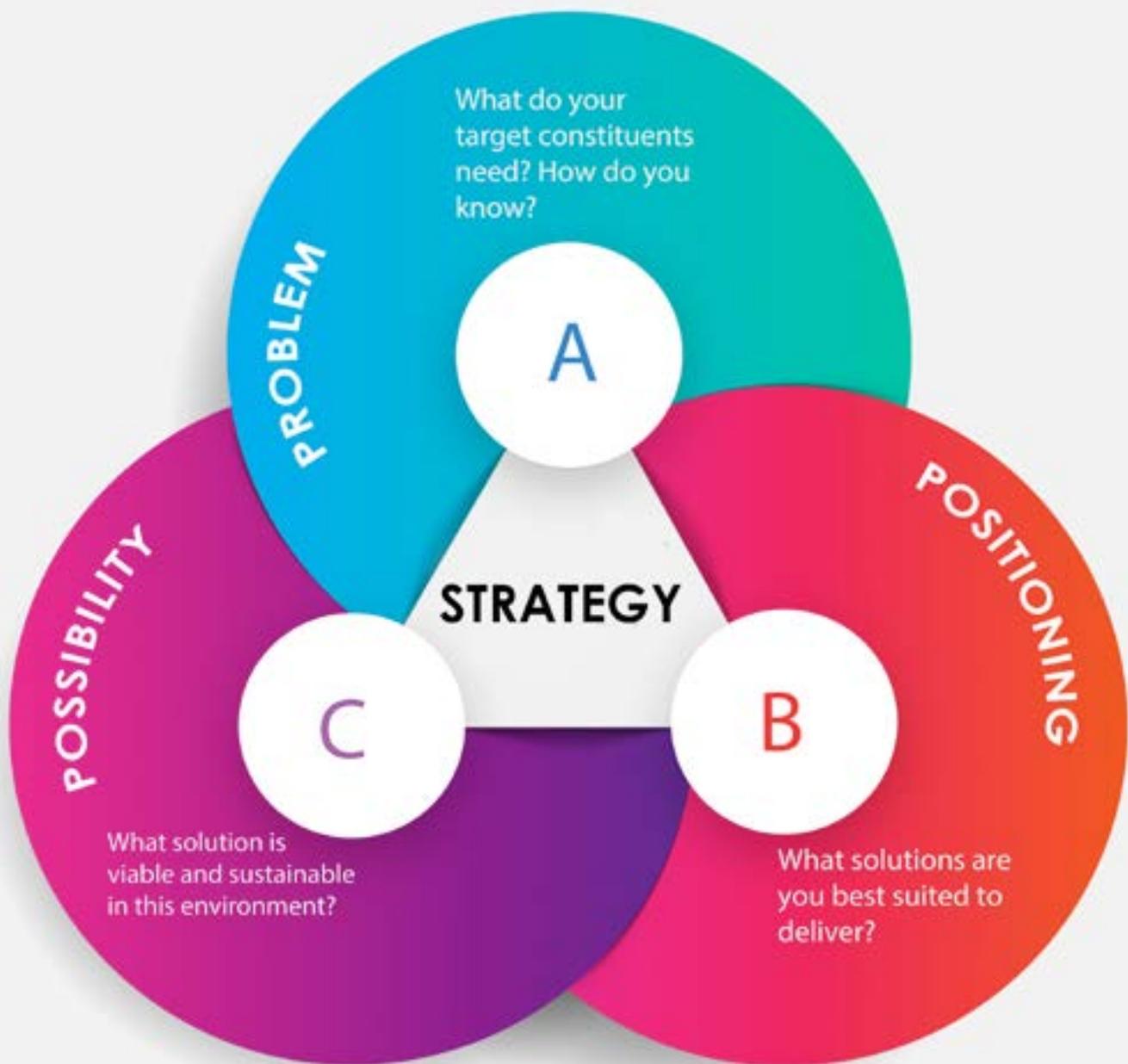
For more information on the Cynefin Framework, read,  
“A Leader’s Framework for Decision Making,”  
by David Snowden and Mary E. Boone

## MODULE 2: PRACTICING HUMAN CENTERED DESIGN

**Human Centered Design (HCD) is an approach to innovation.**

The term, coined by the design firm IDEO, refers to an iterative process of inspiration, ideation and implementation through which groups co-create solutions to shared problems. Through deep listening, creative development of prospective solutions, and rapid cycle prototyping, HCD methodology has been used to create innovative services, products, programs and organizations. In the design process, HCD privileges and integrates the knowledge and perspectives of the persons and communities for whom those endeavors are intended. From a human centered perspective, strategy is best designed at the intersection of desirability (what people need), feasibility (what we have the capacity to do), and viability (what is sustainable in the marketplace).

**Put another way: Effective human centered strategy is built at the intersection of the following three questions:**



## Problem

What do our constituents need or desire? How do we know?

## Tips:

- **Clarify your constituency.** Who is the end user of your service or initiative? Who are you hoping will benefit from this intervention? Note: Depending on the context, there may be a difference between the user and the beneficiary.
- **Invite the constituents for whom your initiative is being designed to participate in developing the strategy for addressing the problem.** Remember: “Nothing about us without us.”
- **Make sure that you have gained the trust of your focus constituents before you inquire about their desires or needs.** Otherwise, you may not get an answer that provides adequate insight into the issue.
- **Review available research and data derived from studies, surveys, and other reliable means.** A review of relevant literature can provide helpful background information to frame your inquiry. However, it is not a substitute for engaging the individuals and communities you seek to serve.
- **Find creative methods for constituents to provide input on the questions and ideas that will shape the strategy** (see the exercise “Practicing Human Centered Design”, below).

## Positioning

What solution(s) is (are) my UCEDD best suited to deliver that meet that need or desire?

## Tips:

- **Conduct an assessment of past initiatives.** What have we consistently done well? Where have we made the best impact? This may provide a clue to the organizational strengths you may use to build a viable solution.
- **Remember: A good idea without the resources and capability to execute it is the wrong idea.** Make sure you have access to adequate human and financial resources to execute what you envision.
- **Think: Within our ecosystem, what does our UCEDD do better than most?** If your solution or program does not provide an improvement on an existing resource or offer a new and effective approach to meet a need, it may not be a solution at all.

## Possibility

What solution(s) are most likely to be viable and sustainable in the marketplace that my UCEDD serves?

## Tips:

1

**Prototyping is a proven means to test and refine solutions.** This is the practice of creating a working model of an idea to test assumptions and logic. Programmatically, it can be used to test and refine cost structures, pedagogical models, stakeholder engagements strategies, and leadership development tools, among other program areas. This approach encourages you to “build to think,”<sup>3</sup> using test-versions of a service or program to iteratively improve as you capture feedback from live, low- stakes experiments. To explore prototyping further visit the “Ideation” and “Implementation” sections of the IDEO design kit at <http://www.designkit.org/methods>.

2

**Measure what matters. Prototypes are only useful if you use them to measure the assumptions at the core of your idea.** Good measurement requires the use of worthy indicators. For example, if you wanted to measure the effectiveness of a disability policy education program designed to increase engagement in advocacy, would it be more important to count the number of people who participated in the program or to track the change in advocacy activity of the participants after the program? Track indicators that will give you reliable data about your hypothesis.

## Exercise: Practicing Inspiration

This exercise invites you and your team or staff to practice using human centered methods that may be useful for the development of program strategies.

### STEP 1

For the sake of this exercise, identify a low-stakes program-related challenge that your team would like to address.

What program-related challenge do you want to address in the exercise?

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### STEP 2

As a team, survey the “Inspiration” methods in **IDEO’s online design kit**.

<sup>3</sup> for more on this concept read Tim Brown’s “Change By Design: How Design Thinking Transforms Organizations and Inspires Innovation.” New York, NY: HarperBusiness, 2009.

### STEP 3

Choose an “Inspiration” method that the team may use to better understand and frame the problem.

### STEP 4

Apply the chosen method to the challenge your team identified.

### STEP 5

Reflect together on what you may have learned from applying this method to the problem.

- How does this method require your team to work differently together?
- What did this process reveal about your team?
- What did this process reveal about the problem?
- What is possible now, that may been less possible before you explored this “inspiration” method?
- How might this method inform a strategy for addressing the program-related challenge you named?

## ADDITIONAL SELECTED RESOURCES FOR FURTHER EXPLORATION

Brown, Tim. *Change By Design: How Design Thinking Transforms Organizations and Inspires Innovation*. New York, NY: HarperBusiness, 2009.

Collins, James C. *Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer: A Monograph to Accompany Good to Great: Why Some Companies Make the Leap--and Others Don't*. New York, NY: HarperCollins, 2005.

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