

**COUNCIL FOR EXCEPTIONAL CHILDREN
REPRESENTATIVE ASSEMBLY**

**Leadership Development Committee
Annual Report for 2019**

Mikki Garcia, Chair

January 28, 2020

1.0 Committee Purpose(s)

Identify, cultivate, recruit, and orient, a well-qualified and diverse pipeline of volunteer leaders for board and committee positions that are responsive to the current and future needs of CEC.

2.0 Committee Members and Terms of Office (The LDC’s operating cycle is Sept. 1 – Aug. 31)

Mikki Garcia, Ed.D. Chair	2022
Anna M. Adl, M.S.	2020
Sheila B. Bailey, Ph.D.	2021
Robin D. Brewer, Ph.D.*	2021
William K. Bogdan, Ed.D.	2021
Maureen O’Leary Burness, M.S.	2020
Marilyn Friend, Ph.D.	2020
Kelly J. Grillo, Ph.D.	2022
Gloria Niles, Ph.D.	2022
Zachary Walker, Ph.D.	2021

* Governance Workgroup Representative

3.0 Objectives (Annual) and Work Plans

- Develop and widely disseminate a revised application for the Board of Directors which, to the greatest extent possible, reflects the need for board applicants who have knowledge, skills and abilities (KSAs) relevant to CEC’s strategic plan and the mission of the board.
- Update the rating rubric to reflect the revised board application.
- Conduct an anonymous needs assessment of the board of directors conducted by a third party in order to determine the KSAs needed by board applicants.
- Slate up to six candidates for election by the membership to fill positions on the board for terms beginning January 2020.
- Present a slate of two candidates for the 2020 President Elect to the board for appointment by November 2019.
- Present a slate of two candidates for Treasurer to the board for appointment by November 2019.

- Plan activities (e.g., a session or a booth in CEC Central) for CEC 2020 to increase awareness of, and answer questions about, leadership opportunities.
- Develop a framework for a leadership development curriculum, then begin developing curriculum and assessment components.
- Determine the cycle for the Leadership Development Programs, including recruiting, application period, training period, etc.
- Develop specific knowledge, skills and abilities that will guide the selection of future board member candidates.

4.0 Summary of Achievements Related to Objectives and Work Plans (Chronological)

- CEC 2019 Convention Activities:
 - Nine of the 10 LDC members were able to attend CEC 2019. They made presentations at 21 division and caucus meetings at the convention about leadership opportunities. For the first time, Board members were asked to sign up to be present as an additional resource. LDC members found this to be extremely valuable.
 - Seven members spent a total of 12 hours in the Membership Booth in Expo Hall to discuss CEC volunteer leadership opportunities with attendees.
 - The LDC held a two-hour meeting. Members discussed feedback heard at caucus and division presentations relevant to the LDC.

The committee also looked ahead to the next steps for member-at-large and officer applications and moving forward with the leadership development curriculum.

- Committee members presented a “Be a CEC Leader” Session.
Intended learner outcomes:
 - learn tips for getting involved;
 - obtain information about CEC’s leadership opportunities at multiple levels;
 - interact with CEC leaders who can answer questions about paths to leadership and help them network;
 - identify next steps in their own leadership journey

The majority of the session was small group discussions, focused on the following questions.

- What prompted you to join CEC?
- What motivates you to continue your membership?
- What are your CEC goals - both personal and professional?
- What type of engagement are you interested in?
 - Micro-volunteering
 - Local or Student Chapter
 - State/Provincial Unit
 - Special Interest Division or Sub-division
 - International Headquarters
- What do you need to help further your engagement at any level (e.g., contact info, resources, support, other)?

Major themes/questions that emerged from the conversations were:

- What entry level roles exist?
 - How can I network?
 - What resources are available?
 - What support can I have for “crashing the party?”
 - Why don’t I feel welcomed?
 - Opportunities are not easily accessible.
 - How can we better connect with student chapters?
 - What are CEC’s goals and/or “need areas” that need people to work on?
- 2018-2019 Annual Report
 - The committee submitted its first “Annual Report” to the Representative Assembly, as required by CEC Bylaws.
 - Committee members Kelly Grillo and Gloria Niles presented highlights of the report at the meeting.
 - An article about the report was prepared for the CEC Connection section of the May/June issue of TEACHING Exceptional Children.
 - The report is available on CEC’s website at <https://www.cec.sped.org/About-Us/CEC-Leadership/Committees/LDC-Annual-Reports>
 - 2019 Board Member-at-Large Application
 - Revised the application for Member-at-Large to make it more streamlined and the questions clearer.
 - Updated rating rubric based on new questions.
 - Developed Board of Directors Call for Applications Marketing and Communications Plan, to include webpage, rotator, announcements in *Special Education Today* and via Social Media and personalized e-blasts to members.
 - 2019 Officer Applications
 - Created revised application for President Elect based on Member-at-Large application, but with additional questions more specific to leading a board.
 - Updated rating rubrics based on new questions.
 - Created a new application specific to the position of Treasurer. Questions focus on financial oversight and experience.
 - Created a new rating rubric for this application.
 - Emailed all eligible applicants about the opportunity to apply for these officer positions.
 - Board Applications for 2020
 - Communication about the call for applications for member-at-large positions, and recruiting by LDC members, continued throughout April and into mid-May.
 - Throughout the application period, as applications were completed, packets of all materials were created and provided to committee members to begin the review process.
 - 38 completed applications were received by the May 22 deadline.
 - The committee held a conference call on June 18 to determine the slate of candidates for the board of directors’ election. Prior to the call, scores from each member’s completed rubric were compiled and the blind results shared.
 - The LDC unanimously agreed on the final slate of 14 vetted candidates for five positions on the board.
 - All candidates were notified of the status of their application by June 20, 2019.
 - Slated candidates’ photo, professional position information and responses to the question “What inspired you to apply to the board?” were included in the Sept./Oct. 2019 issue of TEACHING Exceptional Children.

- Leadership Development Curriculum
 - Beginning in April, members were paired to review and evaluate previously identified leadership training/program models and resources – from both non-profit and for-profit organization – as another step in the creation of a leadership development curriculum.
 - Using the input from the evaluation tool that was developed, the results of the reviews were discussed during a conference call. Based on the evaluations, specific resources were identified for all committee members to review prior to the LDC’s July in-person meeting.
 - A number of committee members completed the American Society of Association Executive’s online seminar series “Strategic Thinking for Professional Development Programs.” Sessions were:
 - Defining Your Professional Development Programs
 - Aligning Your Curriculum with Your Organization’s Mission
 - Supporting Innovation with Design Thinking
 - Improving the Program Experience
 - Chair Mikki Garcia, committee member Robin Brewer, and staff liaison Sharon Rodriguez, met with Executive Director of the National Institute for Public Procurement (NIGP). NIGP is a few years into a governance restructuring and has a body similar to the LDC.
 - Discussion included the importance of a centralized approach to volunteerism, and volunteerism as a critical tool for engagement and member loyalty.
 - Discussion also included the important of getting to a point where the organization can lead with the volunteer, not the vacancy, in order to align opportunities with skills, talents, passion and purpose.
 - In terms of leadership development, NIGP's has a Public Procurement Leadership All Access Pass that provides access to a library of online leadership courses. The courses are designed to help learners build their leadership competencies to become more effective and well-rounded leaders, which translates to better leaders for NIGP. All Access Pass content is from a third-party vendor via a revenue-share agreement.
- Held an in-person meeting July 27-28. The focus of the meeting was on advancing work on the leadership development program and curriculum. The committee discussed:
 - parameters of a leadership development program, including what is useable for this work from the resources the committee reviewed prior to the meeting, the scope of that work, and a broad plan for the work;
 - the importance of “local” systems that support members and build leaders and how this might be woven into the Leadership Institute;
 - how data regarding the capacity of units/divisions would help in redesigning the Leadership Institute and designing the Leadership Development Program and curriculum. Ideas included adding self-assessment questions about unit/division operations, recruitment and retention efforts, and board/committee functioning to the annual assurance form; requesting a copy of the unit/division strategic plan, if they have one; and requiring periodic unit/division member satisfaction surveys with results to be sent to CEC.

- The conversation with NIGP, as well as the work LDC members did in exploring leadership development programs suggests that some type of option, available 24/7, linked to a preferred outcome (e.g., a micro-credential) generally is most productive. Because many such curricula have been developed, it is likely that developing a CEC leadership curriculum from scratch would not be an efficient use of CEC staff and volunteer resources. An alternative would be to offer access to materials already developed.
- Presented a slate of two candidates to the board for appointment of the 2020 President Elect.
- Presented a slate of two candidates to the board for appointment of the Treasurer for the three-year term beginning Jan. 1, 2020.
- Designed and submitted an invited presentation session for CEC 2020 and are planning a follow-up get-together/tweetup for session attendees to engage in deeper conversations around getting involved in leadership.
- Developed the application for LDC terms beginning Sept. 1, 2020.
- Developed a communications plan for the Call for Applications for the LDC, which opened the week of Nov. 11, 2019 via announcement in *Special Education Today*. Additional notices followed via CEC's other communications channels (web, social media, e-blasts, online communities). The deadline for applications is Feb. 13, 2020.
- Board applicants from higher education outnumber practitioners about 2:1. This is only the second recruiting cycle for the LDC, but, based on the board responses, the LDC application was revised to remove "barriers" for school-based personnel by requesting in the education portion just the "Highest Degree Earned" and limiting the resume for all candidates to three pages. This will be the same for the board application.
- Added the question "How did you hear about the opportunity to apply for the LDC?" to the LDC application to provide data to enhance recruitment activities. This will also be included in the board application.
- Developed guidance on application "statement length" to ensure equity between candidates who adhere to the word limit and those who do not. This will also be included in the board application.

Statement Length

The statement length indicates the expected length of responses. While it is acceptable to go slightly over or under, the general rule of thumb is to stay within 10% of the statement length. Responses that exceed more than 10% of the statement length will be scored only on the allowable excess.
- Developed and will implement a two-step application process for the LDC and board.
 - The first part includes the written, on-line application.
 - The second part will incorporate a recorded, web-based interview (e.g., GoToMeeting) of highly-rated candidates from an initial slating, followed by a final slating based on review and rating of the interviews. Recordings will facilitate the ability of all members of the LDC (even if not directly participating in them) to view/listen to the interviews in order to better assess the soft skills and dispositions that come through in a one-on-one conversation.
- Implemented a question for video response for the LDC application. The committee will determine if the video question will also be used in the board application or

whether it is too much of a barrier and will limit applications from otherwise well-qualified applicants.

- Finalized
- Completed revisions to the Board of Directors application for terms beginning Jan. 1, 2021.
- Developed Board Knowledge, Skills and Abilities (KSAs) for the board, with input from the board.
- Developed Knowledge, Skills and Abilities (KSAs) for the Treasurer, with input from the Finance and Audit Standing Committee.
- Scheduled its in-person meeting for July 2020. Members appointed for 2020 positions will attend as well.
- CEC 2020 Convention Activities:
 - Eight of the 10 LDC members will attend CEC 2019. They will make presentations at division and caucus meetings at the convention about leadership opportunities. Board members will partner with them.
 - Committee member will present and interactive a “Be a CEC Leader” Session. Intended learner outcomes:
 - Identify ways to get involved with CEC at the local, state or provincial, special interest division, and international levels.
 - Describe various paths to leadership and ways to build a network.
 - Plan the next steps in their own leadership journeys.The majority of the session was small group discussions, focused on the following questions.
 - What prompted you to join CEC?
 - What motivates you to continue your membership?
 - What are your CEC goals - both personal and professional?
 - What type of engagement are you interested in?
 - Micro-volunteering
 - Local or Student Chapter
 - State/Provincial Unit
 - Special Interest Division or Sub-division
 - International Headquarters
 - What do you need to help further your engagement at any level (e.g., contact info, resources, support, other)?
 - The committee will also host two open networking opportunities for interested convention attendees to meet with current CEC leaders to ask questions about CEC leadership, etc.
 - The LDC developed interview questions for the two-step application process for LDC and board applicants being implemented this year.
- The board approved a motion from the LDC to revise the eligibility criteria for Treasurer. The position of Treasurer requires a different and more specific set of skills related to financial experience and understanding than members-at-large of the Board of Directors, and the previously required board service does not necessarily mean a person has those skills. KSAs for the Treasurer were developed by the Leadership Development Committee, with input from the Finance and Audit Standing Committee. As well, as the size of the board decreases, it will be increasing difficult to fill the positions that currently require board experience (President Elect, Treasurer, and LDC Chair).
- The board approved a motion from the LDC to revise the eligibility criteria for the Chair of the LDC to include committee members who have served for at least two

years, not only board members. Having served on the committee, members of the LDC are equally qualified, if not more so, than members of the Board of Directors, by being familiar with responsibilities, operations, processes, etc., of the committee. As well, as the size of the board decreases, it will be increasingly difficult to fill the positions that currently require board experience (President Elect, Treasurer, and LDC Chair).

5.0 Challenges Encountered and Solutions Identified

Challenge: Committee Member Term Expirations

Since beginning its work in May 2018, the LDC has made significant progress related to its charge to identify, cultivate, recruit, and orient a well-qualified and diverse pipeline of volunteer leaders for board and committee positions that are responsive to the current and future needs of CEC. This progress has been shared in quarterly reports to the board since July 2018. When the LDC was appointed, it was based on a typical committee appointment process of making appointments for one, two or three years so that, as nearly as possible, one-third of the members roll off each year. At that time, the magnitude of the work could not have been anticipated. However, the amount of work successfully accomplished to date reflects the group's cohesion and common vision. But it is necessary to go through at least one full "cycle" to learn lessons and apply them to future work. The knowledge and experience of those currently on the committee is essential to truly make the best-informed decisions about what worked and what didn't.

Solution:

Recognizing that the work that lies ahead is far more critical to the longer-term success of the LDC and the governance of CEC, as envisioned in the recommendations of the Governance Assessment Workgroup, the chair put forward a motion to the board requesting a one-year extension of the terms of all committee members. The board approved the motion on January 29, 2019.

Challenge: Board Application

The following input was provided at division presentation at the convention: One group indicated that the application for the Board of Directors was overwhelming. They also indicated there was too much information provided on the election ballot and it, too, was overwhelming.

Solution:

- Eliminated "compound" questions i.e., those that ask for specific information "and why" to become two separate questions.
- In the previous application, two questions ended up yielding similar answers so one was removed.
- Added opportunity for applicant to provide "other information you want CEC members to know."

Challenge: Engaging a New Generation of Volunteer Leaders by Creating a Welcoming Environment at Division Socials

Over the years, CEC has received feedback that convention attendees did not feel welcome at division socials. These events are prime opportunities for division leaders to engage new members and potential members.

Solution:

The LDC provided suggestions through the Division Leadership Community about how to do this:

- Have intentional conversations prior to the convention about how to encourage engagement with new and diverse members at your socials and other division events;
- Develop a handout of division benefits/highlights to have at your social;
- Designate greeters to be positioned at the door of your social to welcome interested potential members;
- Designate specific leaders to answer questions about your division, volunteer opportunities, etc.

To assist with the last suggestion, the LDC provided buttons for four leaders within each division who would be specifically designated to engage with convention first-timers, students, and early-career educators, as well as new division members, at their on-site socials so that they can be easily identified.

Follow up with division leaders via the community yielded only two responses, only one of which indicated that the division had planned for engaging convention attendees:

“Prior to the convention, the DDEL leadership team discussed being proactive in inviting attendees to social events and to the business meeting between sessions via word of mouth. At the convention, the leadership team made a point of allowing the business meeting to be more interactive by using a projector to display content and foster discussion. A sign-in sheet was used for attendance and to request updated contact information. All of these strategies appeared to work well for the leadership team as the DDEL Executive Board has added new members to the team who express eagerness to contribute to the mission and vision of DDEL and CEC.”

Challenge: Recruiting for Treasurer

The criteria for treasurer stipulate that the treasurer must have had board service. This has seriously restricted the pool of well-qualified applicants. Given that CEC is a professional association of special educators, most board members do not have the financial background necessary to fill such a position effectively. The knowledges, skills and abilities for a board member do not necessarily apply to being treasurer.

Solution:

The LDC put forward a motion to the board, which was approved, to eliminate the requirement that the Treasurer have served on the board.

Challenge: Unit/Division Input

Unit and division leaders are in the best position to recommend potential board (and LDC) applicants. Requests for recommendations were posted to the unit and division leadership communities. Lack of responsiveness on the part of units and divisions continues to be a frustration.

Solution:

While the LDC will continue to be communicative, transparent, and accountable and to not only solicit, but encourage, input from units, divisions and members.

This, however, is not a solution but a continuation of a failed strategy. This concern is not unique to the LDC. Please see request to the board in section 7.0.

Challenge: Identifying Soft Skills

While the committee continues to refine the application for the board, it recognizes that it still lacks the appropriate question(s) or other mechanism to get at the soft skills that are needed to build a strategic and effective board.

Solution:

The LDC is investigating best practices through association, association management companies, human resource companies and corporate websites, articles, postings, blogs and newsletters about better questions or other means to identify these skills.

The LDC developed a two-step application process (for both LDC and Board applicants) to include both an online application and a recorded, web-based interview (e.g., GoToMeeting) of candidates. Recordings would facilitate the ability of all members of the LDC to view/listen to the interviews in order to better assess the soft skills and dispositions come through in a one-on-one conversation.

As with the leadership development program/curriculum and the downsizing of the board, this will be a longer term and evolving process.

The LDC has also recognized that the current application process focuses on experiences and achievements that are sometimes difficult for school-based personnel to achieve and, for that reason, they have a difficult time competing with higher education candidates. The LDC recommends that education and experience be reviewed with the individuals' time in the field and experiences in mind. Applicants should be evaluated based on an individual's growth potential and his/her ability to enhance the diversity, engagement, and potential of the organization. In addition, language should be added

to the application to clarify that applicants' overall experiences and CEC participation are reviewed and that the LDC recognizes that some individuals' professional positions prevent them from extensive volunteer activities.

Challenge: Exceeded Word Limits on Application

Specific word limits were set for the questions on the board application; however, a word limit is not supported by the application platform. A number of applicants ignored the specified limits. This brought forth a concern from members of the LDC that the applicants may lack effective communication skills or adhering to established guidelines, such as board norms.

Solution:

The LDC developed the following guidance on application "statement length" to ensure equity between candidates who adhere to the word limit and those who do not. This will also be included in the board application.

Statement Length

The statement length indicates the expected length of responses. While it is acceptable to go slightly over or under, the general rule of thumb is to stay within 10% of the statement length. Responses that exceed more than 10% of the statement length will be scored only on the allowable excess.

Challenge: Recruiting Candidates from Diverse Groups

Given the demographics of special educators in general, it is difficult to recruit diverse candidates.

Solution:

The LDC will continue both broad and targeted outreach to encourage applications from all diverse groups.

Again, the LDC needs input from units/divisions.

Challenge: Identifying Soft Skills

The committee recognizes the difficulty of framing question(s) or other mechanism to get at the soft skills that are needed to identify well-qualified leaders, or those with strong leadership potential.

Solution:

The LDC has developed a two-step board application and slating process to include both an online application and a recorded, web-based interview (e.g., GoToMeeting) of highly-rated candidates from an initial slating, followed by a final slating based on review and rating of the interviews. This will be implemented with the Call for Applications for the LDC for terms beginning Sept. 1, 2020. The LDC application also has a question that candidates must respond to in 100 words or less in a video.

Board members will be asked to complete an anonymous, online, self-assessment to indicate how well they believe they meet the newly-established Board KSAs.

Challenge: Large Pool of High-Quality Applicants

Narrowing the candidate pool to a slate of two candidates per open position on the board was very difficult this year because there were so many well-qualified individuals.

Solution: The LDC will need to be steadfast in its commitment to slating a well-qualified and diverse pool of candidates while adhering to slating a realistic number of candidates for the number of open positions.

Challenge: Leadership Development Program/Curriculum

Identifying parameters and duplicating/competing with other opportunities for leadership development.

Solution #1:

Given the availability of leadership development opportunities available to special educators as noted above, the LDC should further explore the opportunity of providing easily accessible, 24/7 leadership development “classes” via a revenue-share model, as noted in the discussion with NIGP.

Solution #2:

Develop a more individualized leadership mentoring program, which would be something akin to an IEP for people who are interested in being a CEC leader. They would work with a mentor based on where they are now and where they want to go in their volunteer leadership journey, incorporating experience-driven, real-world situations and trying to identify solutions.

Leadership Institute

Challenge: At its July meeting, the LDC had conversations about transitioning the Leadership Institute from a “CEC 101” to more of a professional development opportunity focused on building leadership skills.

Solution: Have staff explore doing “CEC 101” webinars (e.g., Treasurer’s meeting; general unit/division administrivia) twice a year based on fiscal years (early in the year/after July) so that LI can focus on true leadership development.

Challenge: Repeat Attendees at Leadership Institute

Evaluations of the Leadership Institute have included comments about how content is repetitive. This suggests that there are repeat attendees. If the same people are attending, this does not help build “a well-qualified and diverse pipeline of volunteer leaders” for CEC or its units/divisions.

Solution:

The LDC would like CEC to explore an incentive or other mechanism to encourage or facilitate units/divisions sending first time attendees, such as a small scholarship.

6.0 Comments, Questions for the Board of Directors

The committee thanked board members for partnering with them for presentations at division/caucus meetings at the convention. When asked about the experience, LDC member comments included the following:

- I think it was beneficial. Having two people attend is helpful. The board member could speak to some of the questions about current issues specifically related to the board.
- It was especially helpful and added value to the meeting overall.
- I feel having a board member attend alongside our LDC committee member presents a positive partnership between the board and the LDC.
- It was definitely beneficial for me. (The board member) had some very valuable contributions.
- Both were wonderful partners and great ambassadors for CEC. This approach to visiting board meetings was very effective.
- Absolutely very valuable...it was good to have their presence. They were very helpful.

Recruiting applicants for the position of President Elect was a bit concerning and difficult. The chair reached out to all qualified applicants (those who have served on the board within the past five years, or current members of the board who will have served at least two years at the time of application). Ultimately, two individuals applied for the position of president elect.

While this has been the typical number of candidates in past years, there is growing concern about **sustainable leadership** given the limited number of candidates these eligibility requirements will allow as the size of the board decreases. Even board members who may have the desire to run for President Elect may, when the time comes, have family, professional, or other personal obligations which preclude them from doing so.

CEC's limited demographic data on members again this year, impacted targeted recruiting of candidates from diverse ethnic groups.

While the LDC successfully again in 2019 recruited and slated a large number of individuals who represented many of the aspects of CEC's definition of diversity, there is no guarantee, despite the best efforts of the committee, that the membership will ultimately elect diverse board members or members who will be the best fit on the board based on the annual needs assessment and board KSAs self-assessment.

Because of its concern about ensuring not only demographic diversity on the board, but diversity of perspectives, as well as a combination of personalities and characteristics, the committee has been discussed potential changes to the election and appointment processes, which would require board action to revise the bylaws.

The LDC has concerns about the low voter turn-out not being reflective of the membership. In 2018, out of 18,762 members, 477 voted, for a turn-out of 2.5%. In 2019, out of 18,339 members, 533 members voted, for a participation rate of 2.9%, despite a robust communications plan, including e-blasts, announcements in *Special Education Today*, social media and the website rotator linking to an election webpage.

It was noted that, within the first six hours after the election opened, 36.4% of the total number of votes that would be received over a four-week period had been received. 52% of the total number were received in the first 24 hours. This raises even more concern that members are not familiarizing themselves with candidates and, therefore, not voting based on what is best for the board.

In 2019, three well-qualified candidates applied for the position of Treasurer. The LDC reviewed the applications and agreed to slate all three for board consideration for appointment. Following that, one of the candidates had to withdraw from consideration for personal reasons. Fortunately, the process was able to move forward because there were still two candidates on the slate. However, this may prove to be an issue in the future as the Bylaws indicate that the LDC must present a slate of at least two candidates for officer positions.

7.0 Recommendations for Action by the Board of Directors

The committee requested that the Board, or other entity as determined by the board, explore methods to enhance/improve communication and accountability from Units, Divisions and Caucuses to CEC to support the organization's mission and goals. Ongoing two-way communication is necessary to coordinate efforts and activities, identify concerns and needs, and optimize efforts to promote advocacy, standards development and implementation, and professional development opportunities.

This recommendation has also been put forward by the Board's Diversity Workgroup to address this systemic issue, which impacts advancing CEC's mission and strategic goals.

The LDC put forward, and the board approved, motions to revise the eligibility criteria for both Treasurer and LDC chair. See page 6.