



APTA EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP

PERSPECTIVES OF ELI FELLOWS



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CLASS OF 2015-2016

**APTA EDUCATION LEADERSHIP
INSTITUTE FELLOWSHIP**



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Education Leadership Institute Fellows

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- Burke Gurney, PT, PhD
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- Joy Renae Karges, PT, EdD
- Edward C. Mahoney, PT, DPT
- J. Adrienne McAuley, PT, DPT, MEd
- A. Lynn Millar, PT, PhD
- Ivan J. Mulligan, PT, DSc, ATC
- Catherine Ortega, PT, EdD, ATC
- Myla C. Quiben, PT, DPT, PhD
- Howell E. Tapley, PT, PhD
- Diane M. Wrisley, PT, PhD



TERESSA F. BROWN, PT, DPT, PHD

Education Leadership Institute Fellowship Goals

- Learn skills and strategies to become more competent, confident, and consistent in a leadership role.
- Understand and learn strategies to navigate the academic leadership structure.
- Develop skills in effective communication and negotiation to promote collaboration and a better learning and working environment.

Lessons Learned Through the Education Leadership Institute Fellowship

- Self-awareness and understanding are crucial for being an effective leader.
- You will never stop growing, learning, and developing as a leader.
- Building and fostering relationships are critical for leadership success, and they require consistent work and upkeep.

Institutional Leadership Project Summary

My leadership project was to develop a structured onboarding program for new directors of clinical education (DCEs). The DCE position is often an entry point into academia for clinicians and requires less rigorous requirements than some other faculty positions. However, clinical education is a large part of most curriculums and has huge implications for the program, entry-level practice, and accreditation. This onboarding program would cover not only the day-to-day aspects of the position (communication and mentoring, site development, and documentation, etc) but also the legal aspects of clinical education and accreditation requirements for clinical education that typically don't get covered as a new DCE comes into the role.

TRACY J. BRUDVIG, PT, DPT, PHD

Education Leadership Institute Fellowship Goals

- Improve my strategic planning skills; become more visionary.
- Better understand how to develop a comprehensive assessment plan for a new curriculum.
- Understand and apply management strategies in my own institution to become a better leader.

Lessons Learned Through the Education Leadership Institute Fellowship

- The importance of networking with colleagues and the importance of developing relationships across my institution.
- The importance of listening and being an active listener.
- Learning how to ask the right questions.

Institutional Leadership Project Summary

MGH Institute of Health Professions recently adopted 6 interprofessional core competencies that all students must pass in order to graduate: communication, patient-centered care, critical thinking, systems-based practice, professionalism, and leadership. Three levels of competency have been defined: beginning, developing, and entry-level. My project included identifying objectives across our new curriculum in physical therapy corresponding to the defined outcomes at each of the levels of the 6 competencies. In addition, I identified, where I could, ungraded learning activities where students are able to develop and refine their skills, and graded assignments to measure students' competency level. The start of the new curriculum was June 2016. Where it was possible I tried to link the outcomes to clinical education objectives, because these objectives are directly linked to the CPI and are being measured at different levels through the clinical experiences.

STACY L. FRITZ, PT, PHD

Education Leadership Institute Fellowship Goals

- To find better resources that would help in my leadership journey—people and written resources that can help me to model the way as a good leader.
- Learn how to be more attentive to faculty's and staff's personal and professional needs within the context of a productive environment.
- Improve long-term planning for the DPT program, especially in the domain of assessment.

Lessons Learned through the Education Leadership Institute Fellowship

- I am learning to become a better participant observer; I am trying to be more thoughtful in my discussion. I am more aware of the differing needs of individuals, more aware of the “help” around me from student services to human resources and how all of these contribute to an improved program.
- I have learned the incredible importance of a structured, well-written policy and procedures manual as a way to protect the students, faculty, staff, stakeholders, and program.
- I have learned that the networking opportunities that ELI has provided us with will pay dividends beyond our imagination.

Institutional Leadership Project Summary

The purpose of my project was to reexamine the DPT program's outcomes and self-assessment, including but not limited to program mission, outcome tracking, and curricular assessment. The goal was for me to become more familiar with the standards and to start the process of modifying, editing, and improving these areas of our program. I did this by working on the narrative for Standards 1 & 2 of the *Standards and Required Elements for Accreditation of PT Education Programs*. During this year we reworked our mission, vision, and philosophy statements. We had a meeting where we examined the program strengths, weaknesses, opportunities, and threats (SWOT) to set the stage for our strategic plan. We also held a focus group of stakeholders to discuss the program's curriculum, changes to the program, and goals. It became abundantly clear to me that accreditation is a team event. This cannot (more important, should not) be done alone. To be effective, we need others' combined knowledge and effort including faculty, students, clinical instructors, administrative staff, graduates, employers, and other stakeholders.

STACIE J. FRUTH, PT, DHSC

Education Leadership Institute Fellowship Goals

- Gain a broader understanding of the leadership structure within higher education.
- Be intentional about listening to others' experiences, offering perspectives and advice if asked, and learning from the challenges others have navigated.
- Openly share my own leadership struggles and mistakes, to gain others' perspectives (beyond my own) and so others may learn from them.

Lessons Learned Through the Education Leadership Institute Fellowship

- There is great benefit from the networking and mentorship that occurs via the FIT subgroups.
- There is much wisdom to be gained by intently listening to others and the challenges they've faced.
- I must continually seek a broader and deeper perspective to be a successful higher education leader.

Institutional Leadership Project Summary

At the time this project was formulated, I was managing multiple large projects simultaneously. One of my ELI mentors suggested I explore use of a Gantt chart—a project management system that allows one to track progress of subtasks within 1 or more projects over time. I explored how to create a Gantt chart, learning there are fancy expensive programs available, but also (free) ways to do so in Excel. I created a fairly extensive chart that outlined the 5 projects (and subtasks) I had going at the time. I also created a time line (which can be thought of as working periods with due dates) for the full project as well as the subtasks. My end product was a very large spreadsheet that offered a nice visual picture of each project, its components, and how the working periods for each project's subtasks overlapped.

My expected outcome was to determine if this system would be of use to me in the future, knowing that I'll always have multiple projects to manage at any given time. What I discovered is that this system is not well suited to my own method of cognitive organization. Gantt charts seem excellent for structured linear thinkers—those who operate well with detailed to-do lists. But that's not me. That said, this was not wasted time; learning the Gantt system forced me to better understand how I cognitively process. It's messy, but I get it. I really had to look at why this system was not working for me when I had heard and read many good things about it. I'm pretty equally split between right and left brain dominance; I tend to be highly creative but also a logical, critical thinker. So, perhaps the blend of those traits doesn't lend well to structured, linear thinking that is well suited for the Gantt system. I'm perfectly fine with that.

BURKE GURNEY, PT, PHD

Education Leadership Institute Fellowship Goals

- To share experiences and ideas with established and developing leaders in physical therapy education.
- To continue to develop as a leader in my division by applying knowledge and strategies learned in ELI.
- To grow as a mentor to help the next generation of physical therapy educational leaders.

Lessons Learned Through the Education Leadership Institute Fellowship

- Delegating is an important component of a successful leader. It is predicated on understanding your personal limitations, and helps build stronger relationships within an organization.
- Active listening is critical in the human resources frame to leadership; it is important to listen more and speak less during meetings, adding in after others have had a chance to contribute.
- The political frame is critical to growing any complex organization, including a physical therapy program. Identification of and communication with key players who will be instrumental in developing a physical therapy program is paramount.

Institutional Leadership Project Summary

My project was to develop a service learning (pro bono) clinic in the Central New Mexico community. The clinic opened in January 2016. The clinic currently meets bimonthly, but the plan is to grow to a weekly clinic starting in October. It serves individuals who are either uninsured or underinsured by providing PT evaluation and home programs developed by a team consisting of a clinician (faculty and outside clinicians), 2 first-year students, and 1 second-year student. The first years are involved in history taking and performing basic examination skills, the second years guide the more advanced examination and evaluation, constructing a plan of care. The clinic serves 3 purposes: to provide the underserved community of Albuquerque with PT services; to develop several affective domains for our students including empathy and altruism, as well as clinical skills such as communication, history taking, problem solving, and mentoring, and do it in a student centered way; and to strengthen the bond between our clinicians in the community and our program.

MELANIE HEFFINGTON PT, DPT

Education Leadership Institute Fellowship Goals

- Assess and reflect upon my individual leadership strengths and weaknesses.
- Learn to balance strategic planning while maintaining tactical day-to-day operations.
- Develop relationships within my academic institution that are key to advancing my program's mission and needs.

Lessons Learned through the Education Leadership Institute Fellowship

- Practice the pause. Creative and varied solutions often come from allowing space between stimulus and action.
- Application of the various leadership frames can greatly enhance the success of any initiative.
- Having a small group of trusted colleagues as in ELI can be invaluable in problem-solving the multifaceted issues in physical therapy education.

Institutional Leadership Project Summary

Physical therapy clinical education relationships are being challenged from many directions. Understanding the constraints and concerns of affiliation sites in providing clinical education is crucial in maintaining quality clinical education relationships.

My leadership project was to develop a plan to maximize clinical education relationships with our institution. A survey was utilized to gather data from our clinical education partners regarding concerns in providing clinical affiliation experiences. The results of the survey led me to develop a continuing education series for our clinical education partners. The continuing education series is formatted around the busy clinician's schedule and will be offered free of charge to our clinical education partners.

JOY RENAE KARGES, PT, EDD

Education Leadership Institute Fellowship Goals

- Improve the effectiveness of my current leadership abilities (eg, time management, delegation).
- Enhance skills and self-confidence for future leadership positions beyond my current position as the director of clinical education (eg, fiscal management, negotiation skills, visionary skills, strategic planning).
- Develop a network of colleagues and advisors to support my current and future leadership roles.

Lessons Learned through the Education Leadership Institute Fellowship

- Collaboration with key individuals in departments outside of my program or school is essential for effective leadership.
- There are a variety of leadership frameworks, and all have valuable applications for leadership. I have developed in the “political frame” (Bolman and Deal) and will continue to work on the “symbolic frame.” I will continue exploring various leadership approaches and developing new skills that will be beneficial going forward.
- I need to be more curious and ask questions that facilitate deeper reflection from others.

Institutional Leadership Project Summary

The goal of my project was to develop a formalized leadership thread in our physical therapy curriculum, and potentially develop a leadership course for the students. We cover leadership with various courses and assignments, through academic advisement tracking forms and discussions, and with student extracurricular opportunities. Our mission and vision also include leadership aspects; however, we don't have 1 centralized location or document that tracks everything. I developed a curricular grid outlining the leadership training and opportunities we have in our program and I am assessing input from employees, clinical instructors, graduates of our program, faculty, and students regarding leadership development of our students. I had originally anticipated developing a 1-credit course when the project started. However during the course of the year, we had another need in our curriculum for the 1 credit that was available, so I moved forward in a different direction. Thus, my focus shifted to a tracking system for leadership in our program. I will present my updated findings to the faculty during the fall semester to determine our next step in developing a formal tracking system for the leadership thread in our curriculum.

EDWARD C. MAHONEY, PT, DPT

Education Leadership Institute Fellowship Goals

- Increase my preparation for the role as a program director so that I can lead confidently.
- Develop an understanding of what is needed to be an effective leader and how to address difficulties commonly encountered by other leaders
- Develop the skills to unite our faculty toward common goals.

Lessons Learned Through the Education Leadership Institute Fellowship

- The idea of approaching a situation from a different frame of leadership has been very helpful to me. I now feel that I am more flexible in my approach to problems than I would have been a year ago.
- Perhaps it is a bit counterintuitive, but I have learned that leadership is not a 1-person job. It requires a certain vulnerability to develop a network of people that you can trust and confide in so that you can work toward goals as an effective team.
- Leadership is not an innate ability; it can be learned, improved upon, and shared with others. The effective leaders seem malleable and are willing to learn from past mistakes.

Institutional Leadership Project Summary

I intended to create a mentorship program where young faculty in the School of Allied Health would be paired with more experienced faculty; however, it has expanded to include faculty development other than mentoring based on a needs assessment via online survey of the entire faculty. We obtained information about topics and desired format (eg, mentoring, workshop, or lunch time discussions). Information was shared with all program directors so they could target areas best addressed at that level and with the P&T chair and assistant dean of research to assist with developing mentorship opportunities in those areas. We focused on the workshop topics such as test construction and rubric design initially and plan to progress toward mentoring the young faculty members about what it truly means to be in academia. Attendance is recorded at all seminars and shared with each program so they can use it in yearly performance evaluations as they wish.

The first workshops took place between semesters. Initial feedback was positive, and we are in the process of planning the next series of workshops on effective rubrics for the end of the summer semester. The expected outcomes for the project are to develop a faculty that is excellent in the classroom, proficient in research, and also effective leaders in the institution. These outcomes were chosen as they relate to the 3 aspects of our school's mission: service, research, and instruction. Although this will be an ongoing process with no final endpoint as far as the school is concerned, I anticipate faculty evaluations at the end of each year to be the outcome for individual faculty members to determine how they are developing.

J. ADRIENNE MCAULEY, PT, DPT, MEd

Education Leadership Institute Fellowship Goals

- Learn how to balance listening to others while being able to confidently express my own perspectives, beliefs, and opinions.
- Develop skills in conflict resolution including negotiation and consensus building.
- Gain a better understanding of the culture of higher education and the underpinnings of the financial, regulatory, and legal obligations necessary for programmatic success.

Lessons Learned Through the Education Leadership Institute Fellowship

- The first and last modules provided a wonderful opportunity to learn about relationships and partnerships in higher education, utilizing the concepts of the 4 frames (structural, human resources, political, and symbolic). This has helped me to see difficult situations through various lenses and hopefully be more successful in effectively navigating those situations.
- I've learned that I am not alone in being risk-averse, but that having the courage to take measured risks is necessary for all leaders to be successful. A quote I discovered during the ELI journey paints a meaningful image, "Jump, and you will find out how to unfold your wings as you fall." (Ray Bradbury)
- It is important to identify which responsibilities are those of a manager versus a leader. Trust and integrity are essential for both roles; leaders also need to inspire shared vision and enable others to achieve. (Of course, this is all while keeping within budget.)

Institutional Leadership Project Summary

My leadership project is the creation and implementation of an integrated clinical experience (ICE) for our first-year students. This course will be a 1-credit course that occurs in parallel with our musculoskeletal/orthopedics course during the second-semester. Thus far, I have completed the planning phase including getting approval within my program and securing clinical instructors. Discussions within ELI led me to incorporate the scholarship of teaching into my project. It is my intent to enroll half the incoming class in this course as an elective and to assess outcomes, including course grade in the musculoskeletal/orthopedics course and performance on first full-time clinical experience in order to assess the benefit of the ICE on students' learning. My long-term vision is that this course will be offered to the full student cohort the following year and that we will develop additional ICE courses within the curriculum.

A. LYNN MILLAR, PT, PHD

Education Leadership Institute Fellowship Goals

- Become a more strategic thinker and be proactive—not just reactive—to changes in PT education.
- Improve my communication skills with colleagues, students, and, as important, higher administration.
- Move from being a manager to becoming a true leader of our program.

Lessons Learned Through the Education Leadership Institute Fellowship

- I found that my habit of walking around on a regular basis and chatting with students and faculty is actually a leader technique.
- Having a group of colleagues that I can openly talk to about issues is invaluable!
- While my strength may be one type of frame, a leader needs to be able to use other leadership frames depending upon the situation.

Institutional Leadership Project Summary

My project was designed to help students start on the various behavioral skills they would need in a graduate physical therapist program, through a new “orientation” program. We took 2 days at the beginning of the students’ first semester to introduce the concept of professionalism and the behaviors and skills necessary to grow as a professional, as well as some skills to help them with graduate school. Some specific sessions included: stress management, study strategies and techniques, and self-assessment. In addition, we implemented a regular program for development and maintenance of the professional behaviors, in which the students meet with their advisors every semester. During these sessions they complete a self-assessment, review goals from the past semester, identify growth opportunities, and set goals. Expected outcomes include: less “unprofessional” behavior by students once they are in the clinic (hope to see less clinical instructor concerns regarding behaviors by the last 2 rotations).

IVAN J. MULLIGAN, PT, DSC, ATC

Education Leadership Institute Fellowship Goals

- Identify my leadership style to become a more effective and efficient leader in an academic department.
- Identify others' leadership styles and develop a plan to have these styles complement each other to promote collaboration within a department and school.
- Gain additional insight in developing policies and budget items to become a more effective program.

Lessons Learned Through the Education Leadership Institute Fellowship

- Leadership styles and strategies have provided me an opportunity to grow personally and identify what others need to be successful.
- When assessing the curriculum, the outcomes should be identified first.
- Throughout this process, I have developed a tremendous network of ELI fellows and mentors who are willing to help me when an issue may arise or celebrate the successes.

Institutional Leadership Project Summary

My leadership project was to work with the School of Business to develop a DPT/MBA dual-degree program. This program would enable students who are enrolled in the curriculum to complete these 2 degrees in 4½ years, compared with 5½ or 6 years if completed separately. This program would also save the student significant tuition as several classes that are in the DPT curriculum would be used for the MBA program.

Given the evolution of health care, especially with the changing environment and delivery of health care, physical therapists equipped with the proper financial and management skills will be in a prime position to effectively function in this environment. Graduates of this program will be well positioned to manage a private physical therapy practice; lead a corporate nonprofit hospital, skilled nursing facility, or home health department; or contribute to the development or advancement of health care policy. The DPT/MBA program will provide graduates the necessary skill set to integrate effective business policies into health care.

The expected outcomes for this project include: (1) develop and implement the curriculum for fall 2016 with 2 students enrolled; (2) effectively market the program to the undergraduate students to prepare these students for the dual-degree program; and (3) by 2018, have 10% of students in the DPT program enrolled in the dual-degree program.

CATHERINE ORTEGA, PT, EDD, ATC

Education Leadership Institute Fellowship Goals

- Learn more about linking finances with strategic planning initiatives.
- Exchange perspectives regarding whether leaders are “made” or “born.”
- Discover whether I want to continue to include leadership as part of my service and whether to contribute this leadership service to my profession of physical therapy.

Lessons Learned Through the Education Leadership Institute Fellowship

- “Pause with intention and seek a remedy out of multiple frames,” faculty, Module 1.
- “Ask for money and you will be given advice. Ask for advice and you will be given money” is a lesson that I inadvertently stumbled across and our group mentor brought to my attention.
- A revelation for me was that a person’s leadership style/leadership frame will permeate every aspect of how they lead. If someone is strongly structural, they will even select a budget management style that favors structure, even with the pros and cons that may come with that style. A human resources person will do everything with people in mind, right down to financial management. INSIGHTFUL!

Institutional Leadership Project Summary

In the 6 years since we last assembled to develop a strategic plan for our Department of Physical Therapy we have had changes in administrative positions, with several people as dean for our school and vice president of academic affairs. During this time, the strategic plan for the School of Health Professions was also changed multiple times, though the primary strategic aim of advancing scholarship and research has been maintained. My project was to gather the faculty and revisit our direction. We began with a SWOT analysis, because much had changed with regard to the environment and we had different faculty as well. This was a helpful exercise and discussion. As learned in ELI, we did try to remain realistic when trying to “group” our SWOT items, focusing upon weaknesses in order to capitalize on opportunities.

In aligning our mission and vision, we discovered that the mission statement of the university had changed, an adjustment I was able to explain as a strategic approach to budget management. Though we tried not to refer to the old plan until we had reached the consolidation point of the SWOT, we realized that we ended up in the same place, prioritizing research and scholarship, and communication with public relations. We will finalize the document with the tactical steps and action plan. There are specific metrics that include publication and grant application numbers, with responsible individuals named. Also identified are research skill development activities for faculty; these metrics entail completion. Outcomes for communication and public relations include consultation with professionals to develop an overall plan to increase visibility for the Department of Physical Therapy. Initial outcome is the plan and additional action steps will be added.

MYLA C. QUIBEN, PT, DPT, PHD

Education Leadership Institute Fellowship Goals

- Develop into a more effective, well-rounded leader and professional, and be at the forefront of leadership opportunities.
- Expand skills to prepare for leadership roles with a broader understanding of different aspects of leadership.
- Learn about institutional leadership, resources and financial management, and program development and assessment.

Lessons Learned Through the Education Leadership Institute Fellowship

- Leadership is about people. It's building relationships, communicating personally, broadening perspectives, and harnessing the collective strength toward a shared vision.
- Know thyself. To be an effective leader, you must begin with your values, beliefs, and ethics, before you can create the alignments with institutional and departmental values and directives. Only then can you be comfortable with ambiguity, with reframing perspectives, and with responding to the leadership needs.
- There is no one best way to lead. Leadership can take varied forms. The key is to be flexible, authentic, transparent, and brave to embark on this transformational process.

Institutional Leadership Project Summary

My leadership project involved taking the forefront in addressing the critical need for an organized process for more efficient CAPTE reporting. The envisioned project is 2-fold, entailing the development and implementation of: (1) systematic processes for more efficient data reporting and mining, and (2) a data repository of critical information for CAPTE compliance. The project within the year has since evolved into preparation for an approaching CAPTE visit.

Expected outcomes include developing a plan for curriculum review, reviewing current systems to track outcomes, and developing methods to address any deficiencies identified. The first 2 goals over the past year have come into fruition and included: (1) completion of the initial curriculum map, (2) review of course objectives by individual faculty, and (3) implementation of new departmental processes. Moving forward, faculty discussion will continue take place to establish an in-depth foundational understanding of our program and curriculum. The next steps are to initiate writing of the self-report specific to the curriculum and develop a curricular plan based on our strengths and areas that require enhancement. This project in many ways reinforced the differences in leadership vs management, the need to be perceptive to the current environment, and the importance of faculty buy-in and transparency in moving the project forward. I look forward to future challenges and outcomes with the timeline for completion set for summer 2017. I have learned much and will continue to learn from the process.

HOWELL E. TAPLEY, PT, PHD

Education Leadership Institute Fellowship Goals

- Remain poised and emotionally steady in all work situations to promote conflict resolution and harmonious employee relations.
- Oversee a faculty and staff who are both joyful at work and successful as measured by their own personal career goals.
- Begin the process of training future leaders in the profession through role modeling and formal mentoring activities.

Lessons Learned Through the Education Leadership Institute Fellowship

- Managers within higher education never have complete control and must constantly balance the needs and desires of those both above and below.
- Self-awareness of one's own strengths and weaknesses is essential to becoming a successful leader.
- It is vital to lead with the heart. Although logic is extremely valuable, omission of feelings leads to unhappy people and ultimately poor outcomes.

Institutional Leadership Project Summary

The purpose of my ELI Fellowship project was to develop and deliver a series of faculty training workshops incorporating the latest research and technological resources in order to enhance the quality of DPT education at my institution. The project focuses on improving faculty awareness of course objectives and how they should guide both teaching and evaluation. ExamSoft testing software was adopted by the program, and faculty have received formal training as part of a pilot program. Future faculty workshops will focus on using the software to connect course objectives with test questions. Faculty will also receive formal training in item writing to facilitate better assessment of student learning. An additional workshop will provide an overview of current best educational practices for adult learners. Finally, documentation will be submitted to CAPTE as part of an upcoming accreditation visit demonstrating faculty efforts to both teach and test to course objectives.

DIANE M. WRISLEY, PT, PHD

Education Leadership Institute Fellowship Goals

- Improve my skills in negotiation and conflict management.
- Learn to use political tools effectively.
- Learn to delegate effectively.

Lessons Learned Through the Education Leadership Institute Fellowship

- Leadership is a process and is something that develops through practice.
- Leading is best when you utilize the right techniques for a specific situation with specific people. It is a skill to be able to analyze the situation and apply the techniques.
- I have gained confidence in my leadership skills and my ability to negotiate and delegate effectively.

Institutional Leadership Project Summary

It is difficult to recruit qualified physical therapy faculty into higher education. Applicants with a DPT and specialization lack knowledge of higher education and education principles. Applicants with a PhD, although well trained in science and research, may not have knowledge of education principles. An academic residency will help new faculty to adjust to higher education and be more successful in a shorter period of time. I developed a distance faculty residency where residents can continue to teach in their current facility and have mentoring and didactic instruction from a distance. Didactic instruction will occur in self-study modules, online instruction, and online webinars. Mentoring will occur via telephone or web conversations. Observation of classroom teaching will occur using web resources and videotaped teaching sessions. We have been recognized as a developing residency program by ABPTRFE and are awaiting comments on our application for candidacy.

