

LEADERSHIP FOR THE 90's

A Program to Train Seniors to Facilitate Leadership

SUMMARY REPORT OF A
LEADERSHIP PROJECT SPONSORED BY
THE DOGWOOD PAVILION ASSOCIATION
CITY OF COQUITLAM

SUBMITTED TO:

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LEADERSHIP FOR THE 90's

The Need for Leadership Training and Opportunities

In a learning society, education in later life is not simply an indulgence for the already educated or affluent, but rather as critical to quality of life as housing or income assistance (Moody, 1987-88, p. 6). The Third Age or retirement stage of life is now accepted as neither a period of disengagement, as Cumming and Henry (1961) suggested, nor a time for "keeping busy" (as supported by activity theorists), but a period of personal growth and active engagement in challenging and worthwhile enterprises.

The promise of late-life learning is nothing less than the challenge of human development in the second half of life. The coming of an aging society may give us an opportunity to meet that challenge. Human-development policies for an aging society must be based on a commitment to enlarging human capacities throughout the entire life span, including old age. Such a commitment demands a new understanding of the lifelong role of education for building skills and knowledge. (Moody, 1987-88, p. 7)

The concept of continuous personal development is much more than filling time. It embodies the hope that, with the luxury of time available, the third age may provide an opportunity to contribute the knowledge and experience of a lifetime to the betterment of community life. George Bernard Shaw once said:

I am of the opinion that my life belongs to the whole community and, as long as I live, it is my privilege to do for it whatever I can. I want to be thoroughly used up when I die, for the harder I work, the more I live. I rejoice in life for its own sake. Life is not a brief candle to me. It is a sort of splendid torch which I've got to hold up for the moment, and I want to make it burn as brightly as possible before handing it on to future generations.

Today these aspirations are not just those of the wealthy and powerful, they are commonly expressed by older adults from all walks of life. What is too often missing is the opportunity for education and productive engagement.

This project represented a unique opportunity to work with senior leaders to offer a leadership training program that responds to the personal development needs of participants while offering opportunities to contribute to the leadership at the centre—i.e., a unique way to marry the talents and desires of individuals with the needs and goals of the organization.

Background to the Project

The aging population represents a major triumph in North America. People are not only living longer, but enjoying a healthier and more active retirement than previous generations. The face of age is changing and retirement is not what it used to be. Along with our changing view of the capacities and desires of older adults, we are beginning to view retirement as a time for personal development and productive engagement in community life, for assuming new leadership roles in groups and organizations. However, an in-depth study of leadership at Dogwood Pavilion conducted (Cusack & Thompson, 1993) suggested that the general membership of Dogwood shared a number of assumptions about leadership that acted as formidable barriers to the emergence of seniors as leaders in the centre, such as:

- the assumption that the leader must be a visionary who takes charge and makes decisions on behalf of the group;
- the view that there are leaders and there are followers;
- the belief that most volunteers will *never* be leaders;
- a view of leadership as involving skills associated with management in the work place; and
- an assumption that men should be "running things."

Assumptions about power act as barriers to emergent leadership as well. People who have not been in positions of power in their working lives tend to view power as negative and, therefore, say that they do not want it or need it. Thus the people who have always had power in their working lives and want to maintain the same level of power in retirement are the ones who are most willing to assume leadership roles in retirement. Such people often have traditional styles of leadership that perpetuate many of the assumptions about leadership [identified in the previous paragraph] that prevent the vast majority of people from getting more involved, developing their personal potential, and sharing the power and the leadership.

To change these assumptions and promote a new approach to leadership, a training program was proposed, developed, and implemented that focused on developing the skills of shared-servant leadership as outlined in the training manual, Flying High: A Guide to Shared Leadership in Retirement. Seniors who took the training became committed to this new approach to shared-servant leadership, formed the *Leadership for the 90's* Committee, and laid the groundwork

for a second training program designed to assist them in extending and promoting this approach to group leadership throughout their centre and the wider community.

Introduction to *Leadership for the 90's*

The focus of this report is on the development, implementation, and evaluation of the training program. [A copy of the model is appended]. The program was designed to address three goals with a number of expected outcome:

Primary Goals

- a) to promote leadership and personal development for retirees in Coquitlam;
- b) to train a group of seniors as "in-house workshop leaders; and
- c) to prepare a group of volunteer leaders to work with staff to promote, organize, and coordinate leadership opportunities through a variety of different programs to meet the needs of leaders and potential leaders.

The specific expectations (stated as goals in the proposal) were that participants who completed the program would be prepared:

- a) to plan and facilitate a 1-day inservice leadership workshop for chairs of committees (once a year).
- b) to be assigned to specific activity groups at Dogwood and to attend at least two meetings during the year to facilitate leadership informally;
- c) to organize talks related to leadership (four times a year);
- d) to develop and present a mini-series on the following topics:
 - (1) communication and building self-esteem and confidence;
 - (2) making meetings work/ sharing the leadership;
 - (3) speaking with confidence;
- e) to form an ongoing leadership planning committee; and
- f) to strengthen senior leadership by extending the concept of shared-servant leadership to other groups and seniors organizations in the community.

Changing attitudes and beliefs that are deeply embedded in a culture involves more than simply providing training workshops—it involves learning a new language, learning and relearning skills, and putting new skills into practice. We recognized that many people, by their example and by encouraging and supporting others, could promote the development of leadership in their peers. And we expected a few people would express a desire to become workshop leaders.

The broader goal was to "empower" all participants, i.e., in Lather's (1991) terms, "to stimulate their continued critical inquiry and enlightened action". We wanted to enable seniors to serve as advocates and leaders by providing training that would develop their leadership and group facilitation skills, and then involve them in a supervised practicum where they could practice and get feedback on their development. By using the group to empower individuals, we intended to develop self-confident and capable leaders who knew how to empower others, thus creating a sustainable culture of shared leadership.

Developing the Training Program: Phase I

What Kind of Education Empowers Seniors? The kind of education that incorporates the principles of effective adult education and principles of empowering pedagogy, based on an understanding of the characteristics of retired people. Cousins (1990) considers the question, What kind of education assists women, released from the responsibilities of home and family, to 'follow up and systematize' their learning for a full life beyond their doorstep? The majority of our participants were women—the ratio was 14:2—however, we didn't want to focus on the educational needs of women. We asked ourselves, therefore, What kind of education helps retirees, both men and women, to prepare for a full and productive life beyond retirement?

Our program for empowering seniors as workshop leaders is based on (1) a philosophy and an approach to evaluation and research as emancipatory education (i.e., engaging in critical evaluation raises awareness of one's abilities and talents and the ways in which they can be developed and used, which has a liberating and empowering effect on the individual); (2) a collaborative approach to program development; and (3) reciprocal learning experiences that reflect principles of empowering pedagogy. In many ways, developing the model that grew out of the program involved systematizing the training experience into a kind of a language that participants (and others who were familiar with the manual and committed to this concept of leadership) could then apply to their own specific groups and situations. Florence Nightingale once wrote an impassioned plea for an education that empowers women that has relevance for this particular program. And she had it right.

[Many people] long for an education to teach them to teach; to teach them the laws of the human mind and how to apply them—and knowing how imperfect, in the present state of the world such an education must be, they long for experience, not patchwork experience, but experience followed up and systematised (into a kind of a language). And how should we learn a language if we were to give to it an hour a week?

(Cousins, Adults learning, 2(2), 1990)

Learning the language of self-confident shared-servant leadership and how to facilitate its emergence in others requires a much more intensive learning experience than simply attending a one-hour lecture once a week.

(1) Evaluation Research as Emancipatory Education. Evaluation is a critical component of any community program, however, in seniors' programs it can be a disempowering process, objectifying participants and involving tedious written work that interferes with enjoyment and spontaneity. To the contrary, evaluation research in the tradition of emancipatory education can be empowering for all concerned. The *Leadership for the 90's* Planning Committee was involved in the development of the evaluation procedures with a focus on making evaluation an integral and enjoyable part of the training program. Critical reflection was encouraged throughout the development of the project using both informal and formal methods. Participants were engaged as equal partners, not just by asking them what they liked and what they didn't like about the training, but by giving voice to personal experience, raising critical awareness of their social world, reinforcing their personal skills, and recognizing contributions. Formal evaluation procedures included:

- (1) pretest and posttest questionnaires to participants (see Appendix A);
- (2) weekly workshop and personal progress reports (see Appendix B);
- (3) a participant observation record of all training sessions;
- (4) a half-way assessment designed to focus the leadership practicum;
- (5) written responses to three questions concerning the value of the program to be submitted on the final day;
- (6) a final evaluation in the form of a focus group discussion.

(2) Collaborative Program Development. While we embraced Knowles (1984) principles regarding collaborative program development and evaluation, we found his approach somewhat technical with no instructions concerning how to establish a

climate or how to provide support. Building on Knowles recommendations, we practiced the following principles for empowering learners throughout the project:

- (1) Encourage autonomy and self-direction, involve participants in decision-making regarding every aspect of the program;
- (2) Follow the needs, interests, and leads of participants, rather than the needs as professionally defined;
- (3) Give each participant equal opportunity and encouragement to express his or her views;
- (4) Take every opportunity to recognize individual talents, contributions, and achievements;
- (5) Recognize and build on the diversity within the group;
- (6) Recognize the source of ideas;
- (7) Encourage individuals to choose what they want to pursue and to contribute in self-defined ways; and
- (8) Encourage participants to set reasonable limits on their involvement, and provide constant checks on the workload, extending maximal opportunity with minimal obligation.

(3) Empowering Pedagogy. The teacher/facilitator who intends to empower others does not give up authority and responsibility, but actively works to transfer responsibility for learning to students. Empowering pedagogy involves a shift in power as domination to power as creative energy. A view of power as creative energy requires that strategies be developed to counteract unequal power relationships and to move the dynamics toward equality of power. (Shrewsbury, 1987, p. 9). In "classroom" discussion sessions, our approach incorporated strategies for facilitating critical thinkers outlined by adult educator, Stephen Brookfield (1989): e.g.,

- (1) Affirm participants' self-worth;
- (2) Listen attentively to what each person has to say;
- (3) Show that you support participants' efforts;
- (4) Motivate people to think critically; and
- (5) Regularly evaluate progress

Promoting the Program and Recruiting Participants

Committee members promoted the program by word of mouth and through the centre' newsletter and the local paper. People targeted were:

- those retiring at a younger age and looking for fulfilling, satisfying outlets;
- members who want to be more involved in the centres' programs but are shy and/or feel unqualified to step forward;
- seniors generally wanting to improve their communication skills; and
- seniors who were interested but unable to take the Fall '92 leadership course due to other commitments.

Twenty-five people attended an introductory workshop on How to Make Leadership Easier that provided a flavour and an outline of the program to follow.

The initial outline for the training program was as follows:

FALL 1994: TRAINING WORKSHOPS

- SESSION 1: Introduction to Leadership
- SESSION 2: Leader Language
- SESSION 3: Building Confidence and Self-esteem
- SESSION 4: Individual Goals/ Preliminary Practicum Planning
- SESSION 5: Group Dynamics
- SESSION 6: Making Meetings Work
- SESSION 7: Facilitating Discussion
- SESSION 8: Planning/Conducting an Effective Presentation
- SESSION 9: Open Session

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- SESSION 10: Open Session
- SESSION 11: Presentations, Evaluation, Posttest, Graduation
(nb. Effective communication and public speaking will be themes running throughout the program)

The Leadership Training Workshops: Phase II

The first half of the program involved nine 2 1/2 hour training workshops designed to (1) clarify the concept of shared-servant leadership; (2) build individual self-confidence and self-esteem; and (3) build a supportive team. Incorporating principles of adult education and empowering pedagogy involves a continuous process of dialogue and negotiation between facilitator and learner with the emphasis on balancing individual and group training needs. Confidence in one's leadership skills and abilities does not occur as a result of injections of topics x, y,

and z, but develops through continuous discussion, practice, feedback, reflection, and renegotiation with the focus on topics that relate to the tasks involved in leadership.

Topics. Specific skill-building topics that related to what leaders in seniors' centres need to know were:

- Group Dynamics
- Making Meetings Work
- Facilitating Discussion
- Making an Effective Presentation

Themes. The training program evolved as a continuous process, drawing on the trainer's knowledge and skill and building on the skills and experiences of participants. Themes that recurred throughout the program were:

- communication
- confidence-building
- sharing the leadership
- public speaking

Techniques for Learning. The most important aspect of any adult education program is the creation of a comfortable, supportive environment. To this end, careful attention was given to aspects such as:

- the physical setting - arranging tables, heat, light, water;
- time - beginning and ending on time, setting and negotiating time;
- trainer's influence - attitude, enthusiasm, preparation;
- handouts - carefully prepared, clear, concise, appropriate;
- introductions - to people and topics, clear, adequate
- appearance - dress attractive, colourful, appropriate, clean.

We know that people learn best when they are fully engaged in learning, when they are active rather than passively listening. The emphasis was always on engaging each member of the group in the discussion, while using a variety of learning techniques:

- brainstorming
- class discussions
- role-playing
- small group work

- mini-lecture

A variety of specific teaching techniques and activities were used to develop individual self-esteem while building a cohesive and supportive team, and these are included in the model (see appendix). Beginning at session 4, individuals in the group were given the opportunity to practice their group leadership skills by opening and closing sessions, sharing a joke or a poem.

Summary. A member of the class, provided the following summary of the first nine weeks:

A group of retirees at Dogwood Pavilion have now completed the first phase of a leadership development project designed to prepare them to facilitate the emergence of a new approach to leadership in their seniors' centre. (The first phase is a 9-week course that teaches the principles of shared leadership and develops self-confident leaders: the second phase is a leadership practicum.) As a member of the group, I have observed the transformation of a noncohesive collection of individuals (aged 50 to 75) with diverse histories into a cohesive and homogeneous, tolerant, confident, assertive, and productive group. How did we manage this metamorphosis in such a short time?

We started by absorbing the principles of Shared-Servant Leadership, an approach promoted in the training manual, Flying High: A Guide to Shared Leadership in Retirement. We were then engaged in identifying our individual training needs, while encouraging and supporting each other to develop their individual potential and to share the leadership. Participants were given equal opportunity to speak and to share their points of view, as well as to share their skills and talents. The respect given to each person's views and experience enabled them to recognize and share their strengths.

The first step in developing self-confident leaders was building confidence by motivating, encouraging and supporting each member's efforts. For example, participants were asked to introduce another member of the group, and introductions were followed by positive feedback for their efforts. While practicing and developing skill in communicating our ideas in an interesting way, we all developed a feeling of acceptance by the group, despite our personal limitations. Positive feedback from the group helped people cope with frustrations and nervousness, and promoted feelings of strength and confidence.

Opportunities to build self-confidence and develop speaking skills were presented at each session. For example, participants were given opportunities to introduce the session, share a joke or poem with the group, and report on any events or books relating to shared leadership. Each session was designed to heighten our sense of self-worth, while developing listening and communication skills by using appropriate assertive and supportive language as well as defining, adjusting, assessing, and restructuring our personal development goals.

During the first phase of the program, I have myself gone through a profound change. I began the course somewhat reluctantly with a negative attitude towards groups based on a lifetime of experience with autocratic

group leadership that suppressed individuality and creativity. This group has been a new experience for me. I have learned to communicate more effectively and with more sensitivity to the needs of others in the group. I have come to enjoy sharing ideas in a group and I have a new feeling of acceptance and freedom to express myself.

(accepted for publication in the newsletter of the Older Adult Education Network of the American Society on Aging, April, 1995)

From Training Into Practice: Developing the Practicum

Putting newly-honed leadership skills into practice involved a process of gradually developing and refining individual goals, and matching the skills and desires of individuals with the needs of the 3,000 member organization for leaders to share the workload in the centre. This occurred throughout the training workshops, beginning in session 2, according to the following steps:

- (1) Weekly assessments at the end of each workshop asked participants to identify the skills they would like to develop.
- (2) Participants were asked in week 5 what they would ultimately like to do with what they have learned.
- (3) The Centre Coordinator visited the class in week 6 to present a list of opportunities at the centre and requested volunteers for the various roles.
- (4) The previous week's commitments were reviewed and discussed and additional ideas solicited and explored. The instructor emphasized that individual needs and desires must always come before the centre's needs.
- (5) Participants handed in a written statement of their personal goals for the practicum at the final training workshop, and these were discussed and clarified.

Following the completion of the training workshops, a half-way assessment was conducted as a basis for the development of individual practicums in the final phase of the project.

Half-way Assessment. The half-way assessment included an analysis of individual weekly assessments and an assessment of the group's progress toward achieving expected outcomes as outlined in the proposal for funding. Specific projects that participant/leaders identified in relation to the expectations outlined on page 5 were as follows:

- a) Advisory board leadership training - (three people committed)

- b) This seems to be happening informally (based on participant observation data)
- c) Eight people are committed to organizing talks for various events:
 - Multicultural Week
 - Active Living event
 - Environmental Week
 - Seniors Week
- d) Present 1/2 day leadership workshop - 8 people (Four new and 4 who participated in the first leadership program) have agreed to work on developing leadership training workshops).
- e) Leadership planning committee (4 members of the group are active on the volunteer improvement committee)
- f) Extend into the community
 - Environmental Week - intergenerational activities

In addition to the above, participant/leaders have given interviews resulting in two newspaper articles on senior leadership (see appendix). One volunteered to write an article on the project for the newsletter of the Older Adult Education Network (see appendix); another will give a talk to recreation professionals on leadership. Two will head a team to develop a peer counseling program for the centre. Others will work on a formal presentation to the 24rd Annual Meeting of the Canadian Association on Gerontology in October, 1995 (see appendix). A number of participants/leaders have volunteered to assist staff with planning and coordinating special functions at Dogwood (e.g., Active Living Event, Seniors' Week).

Summary of the Weekly Assessments. In the evaluations at the end of each workshop (beginning the second week), people were asked what skills they wanted to work on. Responses were (in order of frequency):

- (1) To be able to speak with confidence in a group (50 responses)
- (2) To be a more effective group leader/ facilitation skills (40 responses)
- (3) To communicate more effectively (34 responses)

Participant/leaders consistently wanted more practice in speaking confidently and effectively in a group. At the end of the first phase of training workshops, a member of the group who understood the focus for the program would be on teaching people how to lead a workshop, expressed concern that she might not be fully prepared by the end of the program.

The Practicum: Phase III

The purpose of the practicum was to assist and support people in carrying out self-chosen leadership projects and activities. A focus for the practicum sessions was to prepare leaders to facilitate leadership training workshops by providing opportunities for active practice in facilitating groups. Participant/leaders volunteered to open and close meetings, and to facilitate brainstorming and group discussion. The first practicum session was introduced by a participant/leader:

The practicum is an opportunity to put theory into practice. It is an opportunity for each one of us to practice our skills and to work on improving them. I am reminded of my first practicum almost half a century ago at the age of 22. In preparing for my profession as a social worker, I had three months of theory under my belt. That and the enthusiasm of youth were all that I had. Our experience here is much different. We have had some theory over the past three months, but we also have many years of experience and wisdom to draw on. We are in good shape to fly high, and to try many things in the weeks ahead. We'll probably be flying out of formation from time to time, but we have our weekly practicum sessions to keep us on track and support us in what we are doing.

A decision was made by the group to continue with regular weekly sessions designed to further develop leadership skills and to support people undertaking new leadership roles in the centre. Discussions addressed specific roles and group challenges, principles of adult learning and what is different about teaching retired people (ref. Section II, Flying High). A particular focus was on facilitating an effective leadership workshop: three sessions focused on planning, promoting, advertising, facilitating, and evaluating a leadership training workshop (ref. Flying High, pp. 50 - 54).

Following small group work and considerable discussion, the group summarized the characteristics of an effective workshop facilitator as one who:

- (1) is a self-confident communicator
- (2) is well-prepared
- (3) encourages everyone to participate
- (4) radiates friendly energy
- (5) summarizes ideas and discussion clearly

Program Evaluation

Participants. Twenty-two members of Dogwood Pavilion began the leadership training program, and 21 completed a series of eight training sessions in the Fall of 1994. The only "drop-out" was a 73-year old retired professor of biomechanical

engineering from Austria who described his educational history as "university - Zurich, Munich, New York" and himself as an "international consultant in leadership and management training". During the two sessions he attended, he did not appear to listen, but seemed to want a forum for his personal philosophy of leadership. When invited to share his definition of leadership, he asked for a minimum of an hour of the 2 1/2 hours of group time. When this was denied, he left the group and did not return.

Five participants did not complete the practicum:

- a 61 year-old man from the Middle East who did not complete the practicum because of family caregiving responsibilities.
- a 70+ woman involved in many volunteer roles in another community who did not plan to attend the practicum series.
- a 64 year-old woman, a leader in various community organizations, whose responsibilities for grandchildren required more of her time, and she was forced to reassess her priorities.
- a 50 year-old woman of Croatian origin, an ESL teacher and interpreter, forced to retire due to a major illness, returned to work before completing the practicum.
- a 67 year-old woman, not involved in any volunteer roles, got married before the course ended—and, we can only assume that she went on to "bigger and better" things.

Fourteen women and two men completed the posttest on the final day people, including one man who did not complete the pretest and, therefore, the sample size is 15. Participants ranged in age from 52 to 75 years with an average age of 64 years. Level of education ranged from two people with Grade 8 education to two people with post graduate degrees—high school graduation was the norm. Primary occupations included: coordinator for several organizations while raising seven children, food service supervisor in a seniors' home, dental assistant, research and resource librarian, public relations, nurse, office work, social planning and organizational development. Participants included:

- a 75 year-old woman who describes herself as a "home executive" who designed a home that was featured in "Better Homes and Gardens."
- a 67 year-old man with a Masters of Social Work degree from the University of Ottawa who worked 41 years in social services (e.g., as a social planner for the United Way, and with child welfare and youth). Retired for three years,

he is currently a member of the board of the Seniors Lottery and Variety Learning Centre.

- a 74 year-old woman who was an industrial nurse for 35 years—the first nurse in the forestry industry in B.C.—who founded the seniors' information line following her retirement.
- a 61 year-old woman who came from Holland 38 years ago, a journey of 6 days on train across Canada, following which immigrants were given temporary housing and a temporary job, with women and men housed in separate quarters. She raised seven children, and is described as a professional canvasser, having organized heart, stroke, Red Cross, and Mother's March campaigns.

Other volunteer roles represented by participants were: Coordinator of Crafts, member of the Hostess Group, Income Tax Consultant, Volunteer Interview Coordinator, Chair of Dogwood Advisory Board, and Drama Director. (nb. Those who did not participate in the practicum phase tended to be people not involved in a specific volunteer role at Dogwood). With respect to leadership training, eight had taken the previous leadership training course at Dogwood, two had taken other leadership courses, six had experience through leading cubs, guides, and/or Sunday School. With respect to teaching experience: four had taught Sunday School, others mentioned *crafts, night school workshops on retirement planning, first aid, and conference presentations*.

A number of people described their strengths as experience working with people. Individual responses were:

- *skills in organizational development and community planning*
- *35 years as a volunteer in many organizations*
- *I like being useful, learn easily, and always strive to improve myself.*
- *Having a large family and having to give and take and share and be patient, I am caring and understanding of others needs as well as my own.*

In identifying their reasons for taking the course, people emphasized either personal development or to be more effective leaders. When asked to identify specific skills they would like to develop, seven people mentioned communication skills—e.g., *confidence to speak in a group, ability to express myself clearly and concisely; to be able to talk in front of people without passing out from fear*. Others mentioned: *making other people comfortable, the art of meeting and greeting new members, patience and tolerance*. One person commented: *Please help me! I need more self-assurance to overcome my shyness in groups*.

The Post-Test. The program met the expectations of all the participants with one caveat:

There were difficulties because we were dealing with people on two different levels at the same time—i.e., those who had taken the previous course and those who hadn't. I felt that if we were all on the higher level perhaps we could have done more.

People felt the most effective aspect of the training workshops was the way in which everyone in the group was encouraged to participate. Other effective aspects were,

- *the feeling of being included and a valued participant*
- *speaking out in front of people*
- *moving people out of their comfort zone*
- *seeing people begin to work together and trust each other*

One person would have liked more theory in group dynamics and facilitation. And two people mentioned the difficulty of having people at two different levels of development.

The most effective aspects of the practicum were identified as:

- *the increasing awareness of empowerment*
- *the support of individual members in the group*
- *the actual experience of working together on projects and supporting one another*
- *workshops that we actually participated in and then had feedback*
- *the opportunities to speak in public*
- *actually seeing the results at Dogwood— e.g., the multicultural displays, the active living celebration.*
- *planning the workshop*

Suggestions for improving the practicum emphasized the need for more practice, e.g.: *more hands on practice or role-playing in solving problems and using leadership language.* One person suggested the need for, *a session after the workshops to discuss how it went, what could be improved? what was great? where do we go from here?* And the schedule was subsequently adjusted to incorporate such a session.

The project had three expected outcomes (refer to page 4) and three questions were designed to assess the degree to which these were achieved:

(a) Do you feel prepared to promote leadership for retirees?

Without exception, everyone said yes. Individual comments were:

- *Yes, I am already doing the counseling program at Dogwood.*
 - *Yes, I feel confident in my understanding of shared servant leadership and able to communicate such.*
 - *Yes, I feel there are a lot of retirees who have skills and just have to be shown their skills are needed.*
 - *Yes, however, right now my husband is quite ill and I can't commit myself. I'd be letting people down if I could not follow through.*
 - *Yes, I have the confidence to do the task and the mental attitude and verbal ability to help others become leaders.*
- (b) Do you feel prepared to facilitate leadership training workshops?
Eight people said *yes* and seven said *no*—reflecting the two levels of development in the group. Those who had reservations said they needed more practice and two declined for health reasons.
- (c) Do you feel prepared to plan and coordinate leadership opportunities?
Responses again reflected the two levels of development in the group: eight said *yes* and seven were not prepared. Specific reasons were:
- *No, I am not confident enough by myself, but with the support of others it shouldn't be a problem.*
 - *No, but I would be willing to help plan and coordinate a leadership program.*

In other words, the people who said *no* would be prepared to help, given the necessary support.

Every participant expressed confidence that they were becoming more effective leaders. Some specific responses were:

- *Yes, I am more confident and I have more self-esteem.*
- *Yes, am more productive and willing to take on more leadership responsibilities. I also get personal enjoyment from participating.*
- *Yes, I know I am because my group lets me know, and I feel more confident chairing. I delegate more and I am more sensitive to the needs of others.*
- *Yes, I have tested some of my skills in practice and I am more effective in dealing with groups, planning, organizing and coordinating projects.*
- *Yes, I can speak more easily at functions and I think more quickly on my feet.*
- *Yes, I share my knowledge more effectively without seeming to lecture. I listen more carefully, ask for help when I need it, and invite others to share in organizing projects.*
- *Yes, I am more confident and I share my skills by assuming roles that I would never have taken on before.*

- *Yes, I communicate better, my confidence level is higher, and I see the results in my group.*
- *Yes, more people in my group are sharing the workload. I enable others in the group to solve group problems.*
- *Yes, I know I am a more effective leader because people have told me I am.*

Other comments were:

- *I would encourage others to take leadership courses similar to this. Those who have taken the course need to put their new skills to use if they want to retain them.*
- *If each participant would only apply what they have learned in the course to their own group, it will be an important and positive step forward for the entire centre. Some of us want to expand our horizons beyond Dogwood, but first I think we must improve the leadership in established groups to the highest level possible.*

Self-Assessment Scores. On both pre and posttest, participants were asked to rate themselves on a scale of 1 to 10 (10 being high) on 12 items reflecting skills of empowering leadership that were the focus of the training. In comparing the mean scores on the posttest to pre-test means, it was noteworthy that there were increases in means on every item. The most dramatic increases were in (1) the ability to conduct an effective meeting; (3) ability to facilitate a group discussion; (4) ability to communicate ideas clearly; (7) general level of confidence in a group; (8) confidence in speaking to a group; (9) ability to plan an effective presentation; and (10) the ability to give constructive feedback to others. Table 1 shows the scores on the 12 items for 15 participants.

TABLE 1: SELF-ASSESSMENT OF EMPOWERING LEADERSHIP SKILLS

<u>ITEMS</u>	<u>MEAN SCORE</u>
1. Ability to conduct an effective meeting	
pre	5.5
POST	7.7
2. Level of self-esteem	
pre	6.6
POST	7.4
3. Ability to facilitate a group discussion	
pre	5.3
POST	6.7
4. Ability to communicate ideas clearly	
pre	6.1
POST	7.3
5. Listening skill	
pre	7.7
POST	8.1
6. The feeling that others listen to what I have to say	
pre	7.1
POST	7.8
7. General level of confidence in a group	
pre	6.5
POST	7.6
8. Confidence in speaking to a group	
pre	6.0
POST	7.6
9. Ability to plan an effective group presentation	
pre	6.1
POST	7.6
10. Ability to give constructive feedback to others	
pre	6.0
POST	8.1
11. Ability to accept criticism	
pre	7.4
POST	8.1
12. Ability to think clearly in my seat or on my feet	
pre	7.1
POST	7.6

Critical Reflections. Because it is difficult to prepare thoughtful responses given the pressure of time in class, participants were given three questions to take home and answer during the final week of class. Selected responses to the questions were:

How have you benefited personally from this program?

- *The program has taught me valuable communication skills which I can apply to all aspects of my life. It has made me think about myself as a person. It has given me confidence and more self-esteem, and I have begun to realize that my ideas and opinions are of value to others in a group.*
- *My preconceived ideas of retirement kept getting in my way of actively participating in various projects of interest to me. This program has removed these inhibitions, and given me a real kick start to once again enjoy the satisfaction of involvement.*
- *I was able to modify my leadership style from an authoritarian to a shared-servant leadership approach. I have increased confidence in assuming roles and responsibilities. I have improved my communication and observation skills with individuals and groups. I have enhanced my organizational problem-solving skills which were always fairly strong. I have increased knowledge of group dynamics and interaction resulting in improved facilitation skills. I have more awareness of the needs of seniors and I am in a better position to help other seniors meet their needs. I have gained a deeper appreciation of the value of humour in working and interacting with people, and I have acquired some tools (poems/pictures) that I can use in facilitating workshops.*
- *I listen more carefully to what people are saying and then invite them to volunteer for positions that use their skills. I communicate better with new leader language. I have new techniques for group problem-solving and encouraging others to participate. I have made new friends who are supportive and will be there if ever I need help in handling difficult situations.*
- *I have gained self-confidence and I am applying the knowledge I have gained every day in my personal life and in my position as Coordinator for TOPS. Many of my leaders are now using shared-servant leadership in their chapters and the chapters are functioning on a different level now—with each member feeling part of the group and sharing the workload willingly. When I finish my term as TOPS Coordinator, I would like to give more of my time to Dogwood, sharing the knowledge I have gained in this project.*
- *I have increased my communication abilities, my clarity. I have more confidence in public speaking. The program has introduced a beginning "dictionary of leader language" which is an important aid in promoting this new approach to shared-servant leadership. I plan to work towards expanding this dictionary.*

How does the community of Coquitlam benefit when Dogwood Pavilion offers leadership training programs such as this?

- *The community benefits in many ways by the leadership skills we have learned in the program. I have learned how to understand the needs of others, how to share my knowledge, and how to work together to reach common goals. I have become an empowered leader!*
- *This leadership training program encourages more seniors to come forward to take on leadership roles, because they know there will always be others willing to share the load. The community benefits from more seniors with a broader area of expertise willing to share the load.*
- *This program helps seniors to remain more active, therefore healthier and happier.*
- *The community benefits directly and indirectly. Directly—by having a core of senior leaders who continue to make a contribution to their community by helping other seniors help themselves. Indirectly—shared-servant leaders will promote and help to implement the concept of active living and wellness of seniors at all levels of community life.*
- *The whole community benefits when we take our new leadership skills into groups outside of Dogwood. More new volunteers come forward as they gain confidence. With more volunteers, the workload is shared. Furthermore, new volunteers bring new ideas and energy to the community, often becoming leaders themselves and developing new programs that are of benefit to the community.*
- *When senior leaders get more involved in their community great things happen.*
- *Coquitlam gains more willing volunteers who can take on leadership roles in the community—often freeing up hours for our paid leaders time at the same time saving tax dollars.*
- *The program recruits new leaders who will use their skills to operate worthwhile projects that improve the quality of life in Coquitlam. These skills involve recruiting volunteers to do the necessary work to operate the projects and provide whatever management is necessary and also identify leaders from these recruits and cultivate their development to continue the cycle and maintain momentum and hopefully increase efficiency to do more worthwhile projects*

What else would you like to tell New Horizons' staff about this project?

- *Anyone can benefit by taking a course in shared servant-leadership. The skills acquired can be applied to all groups and for all walks of life.*
- *That feeling of being empowered is great. This program has given full meaning to the word. E - enthusiastic, M- motivated, P - powerful, O- optimistic, W-wise, E-energetic, R-revitalized.*

- *This kind of project needs some kind of follow-up, support, and enhancement - e.g., seminars, networking, support groups, etc. New Horizons might play a part in promoting such.*
- *It was exciting to see how each of us changed as the months went on. It is a snowball effect—the more we shared, the bigger our confidence grew, and some people gained enough confidence to start new projects.*
- *Further expansion of this project could lead to alleviating the costs of social service programs for seniors.*
- *You should take this program to all communities.*
- *I feel fortunate to have taken part in the leadership program. I have gained more than I can say, and I hope in some way that this program will continue.*

The Focus Group. During the final session, participants were urged to reflect critically on the program and to identify concerns they had, and what could be improved. With respect to improvement, they suggested:

- *The information was good and we kept notes—we could have had notes provided so that if we missed sessions, we could have the highlights.*
- *Many of us weren't ready for the practicum and there wasn't enough actual practice (i.e., leading class discussions) before we launched into the actual workshop. It would have been helpful if we had practiced different aspects of presenting the workshop as we went along throughout the course.*
- *We may not have been perfect, but I think we regenerated some brain cells. My only criticism is that it can't go on. We need a shot in the arm now and then, to be able to go for a treatment once a month.*
- *It would have been helpful if we had assessed ourselves each week and were then able to keep track of our own progress.*
- *When someone new comes in who hasn't had a leadership course and growth is painful, perhaps the leaders could do extra work and offer a time when people could meet individually with them.*

What worked?

- *It is amazing how shy quiet people improved from almost crying when they spoke to speaking with ease and confidence.*
- *The course made us feel worthwhile by giving every one a good feeling that they could contribute*

- *I think everyone in Dogwood should take this course.*
- *People have always told me I was talented and I never believed them. Now I feel that my contributions are important.*
- *The technique of having the answers come from the group rather than the leader was most effective.*
- *This course is for everyone—it's not just for leaders. We've learned that we are all leaders. You see the word "leadership" and you think "that's not for me" but it is and leadership is for everyone.*
- *This course would be excellent for anyone freshly going into retirement.*
- *We all expanded our horizons. Who knows what's coming next.*
- *I have become aware of how other people could improve in their way of talking and doing things at the centre. I see many people who should be taking this training.*

There were a number of concerns about how to keep the group going and a decision was made to continue to meet on a monthly bases to continue to promote leadership, to discuss problems and opportunities and to set new goals.

The Model

An important outcome of the research process was the development of a model to be used by others to facilitate the development of shared-servant leadership in their groups and organizations. The model, like the manual, Flying High, is based on the metaphor of the Canada Goose. It emerged from the participant observation record of the training program, and was further developed and refined through discussions with participants. Facilitating leadership involves more than just providing a training program—it includes changing attitudes and beliefs and even the language that people use. The model (see appendix) has seven components:

- (1) Principles of Adult Learning
- (2) Secrets of Goose Leadership
- (3) Leader Language
- (4) Techniques for Building Self-Confidence and Team Support
- (5) Group Challenges
- (6) The Human Factor
- (7) Facilitating a Training Workshop

Future Directions

The final responsibility of professionals in a research and development project such as this is to assist individuals and the sponsoring organization in developing strategies to continue the momentum and to integrate what has been achieved into the life of the organization. Participants agreed that the most important need was to keep the group together—"people are most important and we don't want to lose them." It was suggested that the group plan to have regular meetings—*We need to meet more often than once a month, because momentum dissipates so quickly.* Attrition was identified as a problem and the need to have a recruiting program was expressed.

It was suggested that the group might want to consider incorporating into the Volunteer Improvement Committee (several participants are already members) and renaming that committee to reflect the leadership group.

Everyone agreed there were *many leadership issues we could tackle in depth.*

- *We need to work with the different groups in the centre and help them to solve some of their problems.*
- *Fundraising is a big challenge for all groups—maybe we could help them.*
- *We could promote goose poop art—invite people to hear about Gary—talk about a trip to Rochester.*

A decision was made to have a meeting following the leadership training workshops facilitated by participants and to host a luncheon to which interested people from the workshops would be invited.

Recommendations. Based on our experience and the results of the project, we have the following recommendations. The development of seniors as "empowered" and "empowering" leaders is the culmination of a five-year period of leadership and organizational development at Dogwood Pavilion. It demonstrates what is possible when skilled and empowering centre staff work with committed senior leaders to secure funds to support the kind of expertise and intensive training that is required. As one participant stated, *The money to fund the Leadership for the 90's project was well spent. We saw tangible results before the program was even completed.*

Collectively, these people are redefining retirement as a time of continuous contribution to community of life. Despite what we know about the changing nature of retirement and about the desires and capacities of retired people, we (regardless of age) tend to operate from the beliefs and values of a lifetime—i.e., the negative stereotypes that limit late life potential—unless our assumptions are continuously challenged and stimulated. People who are engaged in changing those beliefs and helping all seniors to assume new challenges and to contribute their skills need and deserve to have the highest quality of training opportunities.

In particular, we recommend that:

- (1) the group continue to meet regularly;
- (2) the association either clarify the relationship between the Volunteer Improvement Committee and the *Leadership for the 90's* group or formally incorporate the two groups into a new group that reflects the achievements and beliefs of the participants of this project;
- (3) that senior leader have inspirational speakers available to them to inject new energy; and
- (4) that the centre continue to offer high quality leadership training workshops at intervals in order to recruit and train new leaders, and maintain current high standards of leadership. We suggest that a six to eight-week session focused on honing leadership skills be offered once a year, perhaps in collaboration with other centres. A final outcome might be the development, implementation, and evaluation of a leadership training workshop, building on the one developed in this project, to be delivered by participants to the various activity groups in the centre throughout the year.

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