
WINSTON CHURCHILL MEMORIAL TRUST

REPORT TO THE
TRUSTEES

ANDREW REEVE
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Acknowledgments

I wish to thank all those who have helped to make my Winston Churchill Memorial Fellowship a once in a life time opportunity. The dedicated Trust staff helped me over the angst before departing on the trip. It may seem strange but leaving on such an unknown journey was a challenge and their help was greatly appreciated.

Peter Cooke, KPMG Professor of Automotive Management at Nottingham Trent University is my current manager, supervisor of my MBA at Henley Management College and himself a Churchill Fellow of 2002. He has been instrumental in my interest in management training for people with disability, and for encouraging me to apply for this prestigious award.

Like every teacher I must also thank my students. Working on the Remploy course, developed from Prof. Cooke's Churchill Fellowship I have been inspired to work further in this area. I wish to thank them and hope that these findings go towards making a more equitable society.

To my family and friends thank you for giving me that final nudge to go. Likewise thank you to the people of Canada and the United States of America for your hospitality and making me feel welcome. I hope this research is of value to the friends I made over the water and that it is a vehicle for change in the UK.

I am also very grateful to Trailfinders who made the process so smooth and did not lose their cool when I found I had to reverse the sequence of the trip to get to the last conference.



Mayor Michael Bloomberg meets Churchill Fellow at reception in Gracie Mansion New York to celebrate the 15th Anniversary of the American with Disability Act

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1. Introduction

1.1 Background

Following Prof. Cooke's Winston Churchill Fellowship, a course for Remploy¹ aimed at breaking the glass ceiling to help move people with a disability² from the shop floor to supervisory and management positions was developed. We have run the course three times and with a significant number of promotions achieved we felt by any standard the course was a success, but could be improved.

Research among people I have coached³ working in UK companies revealed that they found value in the experience. Several have achieved promotions in a relatively short space of time. A mentoring⁴ programme with Remploy had produced good, but less positive results. The initial course, run at Nottingham Trent University, for those acting as mentors and being mentored (those being mentored henceforth referred to as "mentees") had excellent feedback. The ongoing execution of the mentoring was good in most cases but there was considerable room for improvement.

The difficulty with coaching is that it is a one to one activity and at present requires my personal time. The attraction of mentoring is while still a one to one activity, greater results could potentially be achieved for less of my personal time. The United States (US) and Canada both have considerable experience in coaching and mentoring and my Fellowship was focused on learning more.

The Fellowship has helped to understand and articulate the issues that are blocking people with disability reaching their full management potential.

1.2 Report format

The journey has been highly personal and resulted in deep reflection. In keeping with the journey the report will follow the same style raising many questions. I have shown my ideas and first thoughts on potential solutions with a view to encouraging others to find better solutions.

This is not an academic report. Some initial desk research was undertaken prior to leaving for the US and Canada to aid my understanding and to identify the people to meet. The findings are based on the discussions I had with the people met on the journey. This can be regarded as a pilot study and further work would be needed to support these initial findings.

¹ Remploy is an organisation set up to employ soldiers who were disabled after the Second World War. Today it employs people with a range of disabilities.

² Disability is complex to define – for the purpose of this project the term is used to refer to those who claim, or would be able to claim, a disability benefit in the UK at the present time. There are issues, for example non disclosure to self or others as people may not classify themselves as having a disability. Restrictions in mobility may be seen as an age issue rather than a disability. On the other hand should mild dyslexia be included?

³ The terms coaching and mentoring are often used interchangeably and means different things in different studies. Coaching in this text is defined as a person with skills as an "educator", not necessarily with skills or knowledge of how to do the job, helping someone to establish and reach their goals.

⁴ A mentor is someone who has practical experience of how to do the job, often having already done the job in the past but does not necessarily have any experience in training people or education.

1.3 Objective of the Churchill Fellowship

The stated aim of the project was:

“I seek to build coaching and mentoring skills into management training, particularly on courses for people with disabilities. I would also like to develop an open programme to encourage those with a disability to coach others with a disability. The findings will be written up for others interested in the field.”

There is a wider area which may follow on from this project. Listening to BBC Radio 4, 31/8/04, In Touch “Has blindness lost its sex appeal”, the programme highlighted the resources issue facing the UK. It is thought mentoring and coaching may provide a wider solution to a growing issue.

In addition, the aims of my Churchill Fellowship were to enable me to acquire knowledge and experience abroad thus gaining a better understanding of lives and different cultures of people overseas. The report will consider how on return, my effectiveness at work and contribution to the community will be enhanced.

1.4 Method

The project started with a broad literature review and study of the previous results that I had obtained running coaching and mentoring sessions. I also had to identify organisations and people to meet. The basis used was:

- Those actively involved in the American Disability Mentoring Day.
- Conferences where I would have exposure to meeting people working in disability.
- Experience running other coaching and mentoring programmes.
- Academics involved in the evaluation of coaching and mentoring.
- Well known coaching organisations.

While I had no positive response from the coaching organisations I felt that given the path the project, or journey, took their addition would have been limited as most of their material has been gathered from books, or previous courses I have attended.

Academic projects tend to focus on a highly defined area. It is a fast way of getting a student through the submission of a dissertation or piece of course work. As will be seen, my Fellowship has taught me there is potential advantage and danger in this approach and perhaps we underestimate the importance of a broad general experience. Being open to new disciplines, for example community psychology, a subject with which I was unfamiliar, brings new insights when ideas are shared. In this study the approach became one of discovery.

1.5 The Report Outlined

My written journal on the trip, excluding the meeting notes exceeds 50,000 words. This report reflects on the journey and the ideas as they unfold chronologically rather than logically. It should

be read as a work in progress raising some of the main issues identified on the trip rather than a finished journey.

Chapter 2 is in the style of a journal explaining how the research was approached and the ideas unfolded. The layout of the report is:

- Chapter 2 reports on the Churchill Fellowship and the journey.
- Chapter 3 summarises the key findings, thoughts and lessons learnt.
- Chapter 4 analyses these findings and considers the implications for the UK.
- Chapter 5 provides a conclusion, considers how the findings will be disseminated and reflects on my Churchill Fellowship.

2. The Winston Churchill Memorial Travelling Fellowship

2.1 Introduction

Alarm bells rang when at the interview Lord Rowlands of Merthyr Tydfil and Rhymney asked what Prof. Cooke meant in his reference by “the Fellowship will help you find yourself”. Life started to change at the interview and continues to unfold. The Fellowship experience is certainly affecting the way I react to situations. There is a greater tendency to identify what has to be done and to be flexible about how this is achieved.

Life can change in a heart beat, the difference from being “able” to “disabled” a second⁵. Anyone can incur a disability at any time yet there are also some born with disability whereas other forms could be argued as “self inflicted”. Should heart disease through obesity, liver failure due to alcohol, or psychiatric and physical disability due to substance abuse be treated the same way?

In the UK it is being questioned if the National Health Service should provide free treatment to those who are obese, smoke or drink heavily. There is considerable debate about the funding of the Welfare State system. Welfare benefits in the US and to some extent Canada are harder to obtain than in the UK yet their public sector expenditure appears to be under pressure to deliver services. This paper does not argue the benefit of these different approaches to state benefits but questions the sustainability and suggests reforms should be considered.

I hope the report encourages others to work with me to help make the findings happen as I believe they can have major benefits for society. This chapter shows how the research unfolded revealing some deep, including systemic, issues with the reasons for them, that I had not previously been aware of, and how some potential solutions for further discussion developed.

2.2 Toronto

Toronto Training Board and ACTEW⁶ provided a valuable discussion on work based learning. We considered the strategic importance of developing and training a workforce to meet society’s future needs. They have concerns that in many key industries the “journeymen” (skilled trades) are approaching retirement with no one to replace them. A parallel problem to the railways in the UK - one organization with which I worked admitted the shortage of railway signal engineers resulted in them paying over £1,000 a day for engineers and having to bring them in from other countries for emergency work.

We discussed a range of issues including: the mobility of the workforce, qualifications in one province not being recognised in another. The federal, provincial and city authorities take responsibility for different aspects of training in different parts of the country. Projects have lost funding when restructuring and changing responsibility between authorities occurred. This conflict or confusion between Authorities is a theme ongoing in my journey.

With respect to work based learning, industry has become frustrated with the Public Sector and University bureaucracy; both Unions and Companies have taken training into their own hands. They feel the system is too slow to react to market needs and is addressing political issues rather

⁵ Bobbie Wailes, Lincoln Center for the Performing Arts, Programs/Services for People with Disabilities.

⁶ A Commitment to Training and Employment for Women.

than future employment needs. Companies are developing their own universities and training facilities. There are strong parallels with Toyota establishing their own training facility at Nottingham Trent University. This would be a study in its own right but could be of immense importance to society! The meeting discussed alternate models and how this may be improved.

We shared our practical experiences of running coaching and mentoring programmes. This helped me to realise where the main problems were with the Remploy mentoring course and ways they may be addressed. The major areas are matching mentor to mentee and providing a support network for the mentor.

The work of ALDER⁷, which has just gone through a time consuming refunding exercise due to changes in budgets at federal, province and city levels, runs coaching and mentoring, bordering on counselling. They work with clients who have severe learning disabilities caused by stroke, drugs (a growing problem frequently encountered on this trip) or other causes. One programme starts with accessing medical reports, then an intensive one to one career assessment by a psychologist before moving onto a coaching / mentoring programme. Alder have some excellent programmes and have developed many techniques, for example, speed mentoring is a concept used to match mentors to mentees in much the same way as speed dating. The matching process is a major issue to make mentoring work well.

My meeting with Ryerson University, well known for their programme and work in the disability arena, was a real eye opener on disability in the work place and issues of integration. We had lengthy discussions on when or when not to disclose, the impact of legislation on employment opportunities, strategies adopted to cope at work, the importance of developing soft skills for those with disability and the role work can play in developing these soft skills. This was exemplified by a number of work based projects run by “Psychiatric Survivors” again ground breaking work, some of these are in difficulty due to changes in funding structures. I am very grateful to them for sharing their work which is shortly to be published.

2.3 New York

The New York conference⁸ was a major event on the Fellowship. The warmth of the welcome was outstanding. I started to appreciate the development of the disability movement, the frustration and patience in slowly moving the issues forward. In the evening I attended a reception at Gracie Mansion and met Mayor Michael Bloomberg.

Reflecting on Toronto and the conference I realised the complexity of the growing problem with an ageing population, young people coming back from wars and the growth in drugs. Simplistically society has moved from: “do nothing and leave it up to the family” – to “do to” (for example sheltered workshops). As an optimist I believe it will, and has to, move forward towards an integrated and more inclusive society. There is a realisation that we cannot continue on our present course of “do to”; it is simply not going to be economically sustainable.

At the New York conference I was surrounded by people with a range of disabilities who were certainly more competent than many I have worked with and scarily bright! Their social skills at putting people at ease with their disability yet being focused on outcomes bought back the discussions with Ryerson in Toronto. I started to notice a pattern which I had seen before at Remploy. Those at the conference can be regarded as high flyers, they make things happen. They

⁷ Adult Learning Disabilities Employment Resource.

⁸ The First National Alliance of Municipal Organizations for People with Disabilities Conference

are talking about disabled people and there is a gap, a distance between them albeit very subtle. Most organisations have a few people at the top, more in the middle and lots at the bottom. In comparison those with disability seem to be underrepresented in the middle of the workplace.

It is interesting to note how patriotic the Americans are, something that we seem to have lost in England. Also, the Americans seem to focus on “things are getting better”. One question I asked was “what stops us”? I could see this was not something they liked to consider. Yet later this thought seemed increasingly important.

I took a trip to Long Island to meet Ability, an organisation once similar to Remploy, providing “sheltered” employment. They placed the workforce of disabled people into the job market raising their salaries and job satisfaction. Ability now provides training, for companies, to help people with a disability integrate and to help employers understand the economic opportunity of having an integrated workforce. This changed my outlook considerably and brought me back to “what stops us”. Interestingly they had many of the answers as they have had to address them. Their facilities also demonstrate highly technical and simple products that help people with disabilities and provide driver training.

2.4 Washington

Where New York is a twenty four hour city, Washington in contrast is solid and plays the role of the statesman. This section was hard to write as there were so many ideas. I could easily have used another week there. My schedule was quite intense with meetings including the organiser of the American Disability Mentoring Day, Booze Allan Hamilton, The Department of Labour, The Office for Disability Employment Policy (ODEP), Social Security Administration, a highly proactive Independent Living Centre and a supplier of support to Ticket to Work.

The American Disability Mentoring Day is important in ways that I had not considered. Primarily it is a means to raise awareness of disability issues and educating employers of the opportunities through employing people with a disability. They have cases where employers have said “on first meeting I saw the disability but by the end of the day I saw someone I wanted to employ who would be an asset to our organisation”. This two way education process, possibly best described as a public relations exercise, gets people in power in the Private and Public sectors to stop and think about disability issues in a positive, constructive and hopefully fun way. It is a very different approach from the political activist or lobby and very effective, a view echoed by the private sector organisations I met on the trip.

Only two new US Government Offices have been formed in recent years - ODEP and the Office of Homeland Security which perhaps flags the recognition that disability and employment has been identified as a major issue facing the United States. ODEP is running a number of coaching and mentoring projects to identify excellent practice some of which they shared with me.

NCWD / Youth was employed to provide technical advice to ODEP on programmes for youth. A similar body was set up for adults but this has had to focus on “customised employment” for the most severely disabled. The work around youth has been heavily centred on the use of coaching and mentoring. Their focus is to try to keep people away from the benefits route and to move directly into employment. They have also produced excellent guidance on when and how to disclose a disability to an employer.

I am more convinced that coaching and mentoring is an excellent way to return people to employment but feel there is something missing. I was directed to “Ticket to Work”, a scheme

designed to help people back into the work place. This programme gets very mixed reactions. Many commentators are highly anti the legislation, with good justification. On balance I came to the view that it was a brave attempt at addressing a number of issues put together under time pressure. The most important issue for this report is that it has acknowledged, if covertly, a major problem that we also need to consider in the UK.

Getting onto the benefits system is difficult and can take two years fighting with lawyers, getting medical reports etc. Once obtained if the recipient was to return to work they would have to start this process again. I was told of cases where people had returned to work and finding they could not cope, had been made homeless before they could get back onto benefit. Ticket to Work sought to make it easier to get back onto previous benefits if they took the step of going back to work. This has to be applauded. The uptake has been low, partly due to the “battle” to get benefits results in a great deal of mistrust. There have also been significant communication difficulties highlighting the gap in communication between policy advisors and their client base.

The first problem is structural, the Government departments involved have key performance indicators and must meet certain efficiency targets, for example social security has to get the right cheque to the right person at minimal cost per transaction; a transport manager is targeted on sticking to timetables. For social security, the “disabled community”, with their often changing special needs are bad for government targets. Policy may be dictating one course of action but employee performance measures ensure different behaviour and objectives. Hence the bus driver may go past the stop rather than take someone in a wheel chair!

The second contention raises a much larger issue - the means of communication. Travelling without a lap top, revealed structural issues that would penalise the poor, and that includes many with disability. Most information is available on the Internet yet without money, or your own computer and internet access this channel of communication cannot be accessed. There is also the assumption that people can use a computer and can read the information. Those with access to information and understand how to use it have power, for those that don't life is difficult. A lap top has become almost as important as a social security number.

Spreading information by word of mouth primarily works through the Independent Living Centre network but it leaves a large part of the communication process to luck. Prior to leaving I was reading the Luck Factor by Prof. R Wisemann. My studies on disability found luck began to feature strongly. If you, or a family member, incur a disability “luck” plays a vital part in what happens next. The Independent Living Centres, a valuable source of advice and help for those with disability, vary in quality around the country in the services provided and their ability to assist the individual. Who you speak to in the Independent Living Centre again plays a pivotal part. The concept of luck in getting access to information features too heavily. This theme developed on the trip and further research is proposed.

I was watching a James Bond film when inspiration arrived. Coaching, mentoring and other forms of work based learning can provide the fuel for the plane to take off. But there are still blocks under the wheels. Ticket to Work seeks to address this by enabling people to move back onto benefits more easily but I am sure there are more blocks.

2.5 The University of Illinois at Urbana-Champaign

This was an opportunity to share my thoughts and findings, to be challenged on my thinking and to help reformulate my initial ideas. My thanks go to Andrea Ellinger for organising the meetings

and enabling me to give two lectures while I was there. The students and other lecturers' questions helped to shape my emerging views on the results to date.

Dr. Scott Johnson, Professor and Head of the Department of Human Resource Education in the College of Education at the University of Illinois took time to discuss the project and urged me to consider the project from a systemic perspective. The coaching appeared to be only part of a much larger systemic issue. This involves balancing the economic issues of "can we afford it" against the human issue of "this needs to be done". There is an argument that it will be the system that decides if it is too expensive to train people with disability and to allow them to work. We also reviewed his experience of "e-coaching and mentoring", along with the pros and cons.

A lecture and discussion, on training issues in the UK that considered what companies are looking for from training was highly beneficial. One issue was the part work plays in the way we interrelate with society, for many it is an important point for social contact. Some people struggle with retirement and anecdotally I heard of an IBM study on retiring executives which had found some die shortly after retirement. A replica study at Remploy may well hold similar results. One of the students, an ex army officer said he believed this was true for retiring officers and I have also been told it is, or was, the same at Ford.

Hearsay, but it raises some thoughts on work and disability. I feel work is important for many people to provide a social connection and a purpose. A similar discussion was held with a person who had a friend who died in his early 50s after becoming paraplegic. He said he never came to terms with the accident, could not find a purpose in his life and seemed to "give up". Work is also a place where we get training that helps us in life, for example soft skills, budgeting through to use of computers etc. Barriers that restrict people from working also restrict integration into society and limit the possibility of having an inclusive society. This is a complex area both from a psychological and sociological perspective.

This again raises the dangers of simply researching the use of coaching and mentoring without considering the wider issues. To maximize the benefit of coaching and mentoring the barriers to progression in the workplace need to be removed. Also the coach, or mentor, needs to take a holistic approach and appreciate the individual. It is important to see how the individual's purpose and direction in life interrelates with work and the goals they are working towards. It is felt this was a factor we had neglected on the Remploy mentoring programme.

Discussions with Prof. Ellinger on her extensive work on coaching and with Prof. Hezlett on mentoring were supportive of my simple research to date. There are major issues around definitions and comparing like with like. The meaning of success can change by study, for example the findings will change if success is it to be measured by promotion or a feel good factor. On balance, although much of the evidence is anecdotal, the view was that the use of coaching and mentoring suggest improvement is possible.

In a Brown Bag lunch session, a brief lecture and lunch, the purpose of the trip and initial findings were presented and discussed. An excellent challenge was "the research is raising a lot of ideas and should I not be focusing on a specific area to draw conclusions". This led me to reflect on our educational system. The student, studying for her doctorate, was correct if the aim is to pass an academic project quickly but had I only focused on coaching and mentoring I would have neglected the system issues and the inherent dangers of using coaching to push someone into a career without understanding the financial implications for the person being coached. Extracts from the presentation are appended.

2.6 Chicago

A meeting at the Mayors office on disability issues, followed by a meeting with another proactive Centre for Independent Living helped me to appreciate the development of disability issues and the steady movement forward. It is a love hate relationship featuring advocacy, embarrassing pressure and many of the parallels of other civil rights bodies that have made progress towards a more integrated society. The Mayors' Office officials have to meet the needs of their employers and work with the lobbyists to find a path forward. One example is the transport providers in Chicago being taken to court. The settlement package included a plan to make the transport system more accessible, with targets to report back on each year.

A major step forward came at the meeting on the "Disabling Bullet Project" at the University of Illinois at Chicago. This is a peer mentoring project that worked with young men who had become paraplegic typically following armed gang fights. The project was heavily supported by a leading medical doctor. This shows the importance of activity at the hospital stage - not just working on the physical issues - but also the psychological. The mentors were returning to the hospital to work with those who had been more recently injured. Given the nature of the work and that those running it came from a community psychology background the programme was very well organised and had strict codes of conduct. For example, it was clearly stated that if harming themselves or others was mentioned to the mentor then "all bets were off" and an agreed emergency procedure would start. This project provides a study in its own right.

The project pulled much of the earlier findings together. In summary the key lessons were:

- Community psychology came from clinical psychology. The analogy explaining it as a discipline was that the clinicians felt good at pulling the first few babies out of the river but then thought the effort would be better spent in stopping them falling in. This sums up my project to date. There are a lot of babies being pulled out of the river, new initiatives being set off generating good press, but no one is grasping the fundamentals.
- The peer mentoring project is self feeding, mentees progressing to mentors. A number of mentors had progressed to take full time jobs in the hospital and at "medical supply" companies. Exposure to the skills required to be a mentor had probably made them more employable. Given their background, possibly more employable than before the accident.
- When looked at from my business background, as a financial solution this looks highly cost efficient. If employed they will be paying taxes rather than just taking benefits making it more cost effective.
- My MBA dissertation on New Product Development stressed that new products are getting increasingly complex to develop and there is a need for cross functional team work. What I see in this "industry" is everyone working in their area with very limited cross over while considerable benefit could be achieved by cross functional teamwork.

2.7 Calgary, Vancouver, Victoria

In Banff I stayed in a house occupied by people from all over the world. We discussed a range of topics including Katrina, the hurricane that had devastated New Orleans. It was suggested that when a number of different authorities work on a project it is a recipe for inertia. Infighting on

budgets and responsibility can result in minimal action. Interestingly this has similarities with this project, but later in the trip I saw a military style of command to tackle the aftermath of Katrina making things happen.

Marie Antoinette is alleged to have said “let them eat cake” when told “the poor had no bread” (obvious if you have bread and cake on the table). Perhaps the modern equivalent is the use of the internet to convey information to an audience many of whom are too poor to afford transport to leave before the hurricane struck, let alone a computer or have the skills to use one.

Perhaps a new form of class in society is developing. The new technology of the Internet, Voice Recognition Software (e.g. Jaws) is levelling the playing field enabling many with disabilities to be as effective in the modern workplace as those without. Perhaps a major disability of the future with respect to employment is what happens to those who cannot use the Internet.

My meeting with the National Institute of Disability Management and Research in Victoria challenged my thinking. Seeing what can be achieved from a small office inspired me to think maybe I could set up and implement some of these ideas developing on my trip of discovery.

2.8 Seattle

The day started with a 6.30 trip to the Pike Fish Market which features in a video used at Nottingham Trent University on culture, motivation and attitudes in the work place. It was good to see the place where it was made and the people who run the stall really do enjoy their work.

The meeting with “Do-IT” (part of the University of Washington) provided a glance into the future; machines that generate kinaesthetic pictures, you can tell by touch the different levels of black and grey in a picture, convert books and lectures into MP3s or Braille, plus other machines adapted for a wide range of disabilities.

Do-IT organise a number of programmes to encourage people with disability to go to university and train for professional careers, primarily in IT. They provide a mix of one week courses with inspirational presenters, elements of coaching and mentoring, while providing a platform for a virtual community to thrive. Past students come back to encourage others and show them what they have achieved. There is a family atmosphere.

2.9 Palo Alto

Hewlett Packard (HP) has been rolling out Disability Mentoring Day to the UK and at sites in Australia. The organisation sees the importance of understanding disability as this is identified as a large growing market and can provide a source of employees. Part of the issue, as emphasised earlier by Booze Allan Hamilton, is to educate existing staff of the opportunities presented from people with disability. The meeting yet again provided further evidence of a HP mentoring programme that had worked very well for new staff at HP.

From Palo Alto I went to Santa Cruz the origin of Neuro Linguistic Programming (NLP) - my introduction to coaching and mentoring. While the visit showed there is a lot of confusion as to what is coaching and mentoring, I have seen examples where the work provides a cost effective solution. It is not a panacea and it is important it is organised and managed correctly. The trip has placed me in a much stronger position both to develop and deliver these programmes.

2.10 San Diego Conference

I was very lucky to have the opportunity to have two meetings with Dr (Prof) Fred McFarlane one of the Founders of The Interwork Institute. As Peter Cooke stated in his report, he is one of the gurus of disability education in the US. The University is looking to start a mentoring programme so I am sure we will exchange ideas as this develops. The first meeting arranged for me to attend a two day workshop with people working in the rehabilitation sector. Presentations were by industry experts and provided an opportunity to explore some of my findings further.

A major issue discussed at the workshop was the implication of substance abuse. This is resulting in people developing a range of disabilities, mainly psychological. In the UK private medical insurance is highly restrictive on the supply of treatment on psychological problems mainly due to the costs being hard to control. Once again this is a complex area, perhaps one that is not expected or comfortably linked with disability. It does result in the need for medical treatment and a range of disabilities from heart attacks, amputation from injecting heroine mixed with substances that block arteries, through to psychiatric issues.

At the workshop Craig MacLaughlin MFT, Development Manager for Mental Health Systems Inc, discussed the high proportion of people with mental health issues as a result of substance abuse. He went onto say that some 70% of people in the prison were there for a crime related to substance abuse and Methamphetamines were a significant problem. The cost to keep someone in prison is about \$60,000 a year and new prisons are being built in California to cope with the growth in numbers. Returning to the community psychology philosophy perhaps it is less expensive to treat this in the community. Then this needs to be balanced against prevention of crime and the protection of society. With the escalating cost of public expenditure in the US and in the UK it is hard to see how the current approach can be allowed to continue.

The second meeting with Dr. MacFarlane allowed me to explore my findings and how to approach writing this unusual report. I was encouraged just to write it up honestly, not to tackle it as an academic report but a series of short issues and possible solutions. Prof. Cooke encouraged me to write it as a journey. Reflecting on both sets of advice I decided to outline the journey in chapter two but provide the findings in the next chapter.

3. A Summary of the Observations, Thoughts and the Lessons Learnt

Most of the findings are a mixture of the recorded statements, non attributable conversations, and personal interpretations from across the trip. There lies part of the problem and this report can but voice the issues for others to investigate and move forward. To be true to the project this is how I see the situation following the Churchill Fellowship.

1. Work is generally an important way for people to gain meaning in their life by making a contribution to their society. This is not true for everyone but it is for a significant proportion of people. See section 2.5 for further thoughts.
2. The number of people with a disability is and will continue to grow, due to an aging population, maintaining life due to advances in medicine, war, obesity and drug abuse.
3. Coaching and mentoring can work in getting people promoted into jobs and into middle management. Lack of soft social skills, computer illiteracy, and the lack of education is probably a more real barrier to the modern workplace than a “disability”.
4. “The system” spends a considerable sum on training people with disability yet there was suggestion of inadequate and in many cases probably no cost benefit analysis undertaken. Details cannot be reported as people do not want this attributed to them or their organisations.
5. The course at Nottingham Trent University developed from Prof. Cooke’s Churchill Fellowship and the work on this study on coaching and mentoring have found cost effective ways to manage training and development that achieves results.
6. Providing management training and coaching could do people a disservice by preparing and encouraging them to enter into employment. It could raise expectations that could not be satisfied, due to taking employment resulting in their loss of benefits and income.
7. It is important to educate society that a disability is not necessarily a barrier to employment. The American Disability Mentoring Day and Internships within organisations is important to get society to see the individual’s ability, not the disability.
8. The trip provided evidence and understanding as to why there is a lack of people with disability in middle management. This is a systemic issue and a waste of life, talent and tax payers’ money. Given the benefit system if a person is receiving home help, medical care and other allowances they can be better off on benefits than to give up the disability package and take a job paying \$50,000. In consequence a lot of the work is under the table (our black economy). Some packages even stipulate you cannot even undertake voluntary work. I heard of well educated competent people, ironically an education paid for while on disability benefit, not being able to help society but being economically forced to do nothing by the system.
9. Hospital and medical rehabilitation facilities are accelerating people through the process. Repeatedly I heard how people who had incurred spinal injuries over five years ago felt they were lucky as they had time to adjust in hospital and rehabilitation. Today a twenty year old who suffered a spinal injury is most likely to be placed in a care home for the

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- elderly. Isolated from their peers, probably a feeling that society has written them off, I have heard examples that some do not adjust and die young.
10. Joining a management or employment course is luck. The majority of people with disability do not get the opportunity to attend. It is a function of who you know, where you live (I have heard talk of people with a disability moving to areas that are more suitable for their needs), you or a friend's education and ability to navigate the system.
 11. Substance abuse will result in an increase in the number of people registered with disability. The talk by a psychologist who has undertaken a lot of work in prisons said about 70% of those inside are related to some form of substance abuse. Two new private prisons are opening in California which suggests the growth of this problem. The cost of keeping someone in prison is around \$60,000pa. Even if the figures are exaggerated given growing pressure on public sector expenditure both in the US and the UK it is an issue that needs to be addressed.
 12. One person said a relation had been on methamphetamines which had resulted in hallucinations and paranoia. He is now holding down a simple job on a minimal wage and the tax payer is paying for medication at \$300 a month. He is early 20s so if he lives for 50 years that is \$180,000. Can society afford this given the number of young people I saw begging on the street during this trip which I was told was a function of drugs?
 13. To reduce the cost of providing home help to the State one trick is to put people back into homes - an expense paid out of the Federal budget. This is at considerably more expensive than providing support at home.
 14. The current system is creaking even more than I had thought. Budgets have generally not increased for several years yet the number of people needing support is growing.
 15. The research found through discussions with those working in the sector that the system is not coping with the increasing demands on the services. The current system and approach is not sustainable.

Perhaps this accounts for the politicians knowing of the impending pension crisis being more inclined to sponsor events and training than to consider addressing the benefit system. It is easier and better for votes to "pull babies out of the water" (show activity) rather than going to the source of the problem. This is not to decry the events and training, these are very important activities. An aeroplane will not take off without fuel going to the engine (training) but it also needs the blocks taken away from the wheels (adjustment to the benefits system).

ODEP is a start but it will take a government with a long term strategic perspective to address the above issues. It will not be easy as most of the areas that need to be worked on have many different authorities involved with conflicting objectives. We return to the Katrina comparison as this needs the authority to cut through budget and responsibility squabbles.

The above may read as a criticism of the US and Canada. This is not the intention. On the contrary it is because I was looking at it dissociated from the system that I noticed many of the issues. The UK has similar issues but I was seeing the symptoms, not the causes. In many ways the US and Canada are perhaps addressing these far better than the UK. On return home I was asked "are you not depressed by the work?" In short no, in fact I am excited about it as with some changes we as a society can create a win-win situation.



Sir Winston Churchill Toronto Canada

4. Analysis and implications for the UK

4.1 The objectives of the Churchill Fellowship met

Evidence from managers running coaching and mentoring programmes, and conversations with academics evaluating such programmes convinced me that this strategy can play a cost effective solution to many management training issues.

Coaching and mentoring are not panaceas. Programmes need to be well thought through before starting, with clear success criteria agreed, adequate resources and, for mentoring, a well established support mechanism for the mentors. Just being more advanced in a discipline does not necessarily mean that the person has appropriate skills for training others.

When setting the criteria for success it is vital that a holistic approach is adopted. A mistake with Remploy was agreeing with the training manager to judge success by promotion to the next level. Given many people with disability work in a “cottage industry” setting the only way for progress within that unit is for someone above to die or leave the organisation. Typically if coaching, you may encourage the person to look at other departments or relocate geographically to a different part of the business. For those with a disability, support networks become of greater importance. Likewise on a lower salary, relocation becomes very costly and if the situation does not work it is a larger risk as return is likely to be a prohibitive financial burden.

On the mentoring course one of the mentees had seen an opportunity at another factory. Excited by the course he set a goal of taking this new post. Gut instinct told me to change that to “evaluate if the job would benefit him and his family then to take a decision”. We then discussed what he had to look at from schools, to housing etc. Following this trip I now know how important this holistic approach is.

I have a raft of ideas and a good knowledge of the technical pitfalls of setting up coaching and mentoring programmes. These will be written up in a follow up document. They include speed mentoring to match the mentors and mentees through to using virtual communities to select appropriate mentees or coaches for a pending issue. I intend to develop these further at Nottingham Trent University.

The broader issue of peer mentoring as a support, or substitute, for some of the services supplied by social services in the UK would appear possible. The Disabling Bullet Project provides a good base to develop such a solution. There are important communication issues to be addressed plus upfront funding but in the long run this could be more cost efficient than the current approach.

4.2 Issues for the UK benefits and welfare system

As in the US and Canada debate needs to take place around “work” and how that relates to the structure of society. Early retirement and an early death due to a lack of purpose linked with the pension crisis all suggest further thought is needed in this area. If on average we continue to retire say on average at 60 and live till 80, with people not starting work till 20 (Government aims to have 50% of the population in Higher Education) that provides a maximum of a 50% split between the workforce and the rest. Yet a meeting with an old friend and researcher the other night revealed he is approaching 70 with no intention of retiring. Can work and purpose keep the mind agile?

As a population ages disability due to heart attacks, accidents are likely to increase. Overlay a young population that has increased substance abuse and the mental health issues this can cause disability as a cost to society is likely to increase if we follow our current system. A major concern is the likely growth of methamphetamines, particularly “Crystal Meth.” This is highly addictive, easily made and is starting to appear in London. My observations on the streets of both the US and Canada is that the UK needs to start preparing for this now!

The debate needs to extend to the prison system where as in the US substance abuse is a major factor. If the US is paying \$60,000 per person in the UK I would be surprised if it was less. Following recent conversations with Police on the cost of prosecution or even investigating a crash the costs are placing a heavy burden on the tax collected.

While the welfare costs are increasing if the young students I have worked with are representative we are also looking at a very geographically mobile workforce who will move to more favourable tax regimes and where the standard of living is better. I now understand the motivation of my friends who have immigrated.

Given increases in welfare costs and it being potentially harder to tax a more mobile work force we should question the economic viability of the current approach. We are at a stage beyond the need for politics. This requires “Roman or Victorian” long term strategic thinking, the type that built bridges and tunnels that we use today. We cannot afford to have government bodies playing games and transferring costs between each other to balance budgets.

One potential quick solution to move people with disability into middle management and saving tax payers’ money has become apparent. The accounting argument is one of sunk cost. If someone is disabled and needs a package of medication, housing support, home help and some transport they will need this if at home or at work. The table below shows by continuing to pay the benefits and allowing the person to work the cost to the tax payer is £15,000 less. But the individual gains the experience and the benefits of working plus an additional £5,000 of income.

	Benefits at home	Benefits at work
Income support	£10,000	
Benefits (Housing, home help etc.)	£30,000	£30,000
Salary		£20,000
Tax (NI and income say 25% on total)		-£5,000
Cost to tax payer	£40,000	£25,000

This creates a win-win situation, with inflationary pressures and promotion prospects the situation will get better. This is simplistic and probably quite complex to get through the system. The main issue is that common sense cannot prevail unless a cross discipline working party is set up that reports to a political decision maker with clout. This is exactly the same as the Katrina situation.

The report therefore identifies a need to model what society will look like in future; use a multi disciplined team to consider if the current approach and systems are sustainable. It then needs to consider what needs to be done to the benefit system to balance the budgets.

4.3 An outsiders' observation on disability – changing the views of society

As previously stated we can get a disability in a second. Since returning I am more aware of crashes, accidents etc. this is not to be negative but to raise the question to myself and others do you become a different person?

A film I was advised to see in America but could not find it showing was Murder Ball about paraplegic sportsmen. Would these competitive sportsmen be playing if they had been left in a home for the elderly? Society needs to provide proper care to help people to adjust.

Another issue is one of disclosure. A lady discussed her husband who had cancer and struggled to get across the room. She said he would never describe himself or see himself as having a disability. It is not only disclosure for work to an employer but also self disclosure. Some that struggle to hear would say that I am just getting older, not I can no longer hear and should see what is available to help me. On the Nottingham Trent Remploy programme only 33% declared a disability. This is a complex area as on the one hand there is the view that the limits imposed by many disabilities are as tight or as broad as the person chooses to make them. On the other there are the issues of denial and the back lash of many against Christopher Reeve.

Employers need to see the opportunity for sales revenue and for good employees through understanding disability. From my observation the best way is not simply through coercion from legislation, as this can often be worked around, but by showing economic benefit. Pressure groups can be counter productive. The American Disability Mentoring Day and a number of the internships for people with disability offered by companies in the USA are valuable in raising awareness and understanding among employers. The theme repeatedly heard from employers was, when we first met we focused on the disability and after we worked with them for the day we understood the contribution they would make to our company. In the UK we are behind the Americans and should use internships or the equivalent of Disability Mentoring Day.

From a marketing perspective Public Relations and use of the media in a positive way seems obvious. Coronation Street and East Enders tackle social issues, for example HIV but wheel chairs, deaf and blindness could be covered to show the routine day to day issues. Product placement works which is why companies spend large sums on it and Government legislates on the subject.

The research from Ryerson has helped me to appreciate the complexity of the coping techniques used by people with disability in the workplace. Like everyone in a working group there is a need to fit in and to be part of the team but there is also a need to seek accommodation, to help work more effectively. This will be valuable when coaching and mentoring programmes are developed to help with the softer skills. It would be good to make a wider audience aware of these issues if we want to have an integrated society.

I read Prof Wiseman's book, the Luck Factor, at an extremely opportune moment and it has close connections with the findings from research being undertaken at Ryerson University. It would be very useful to replicate his work among people with disability. Guessing the outcome I imagine the results would be extremely polarised with next to no middle section and this would reflect what is going on in society.

Prof. Wiseman utilised his findings to run a school to improve peoples' luck. It looks at the soft social skills that make a difference. Our work with Remploy was predominantly about raising

delegates self esteem and confidence in their own ability. Proving to them that they can do it! Linking these two together may generate a powerful tool to help move people with disability up the management ladder. This would be a fascinating subject to work on further.

In summary there is a need for a cohesive public relations campaign to win hearts and minds on this subject of disability and moving towards a more integrated society. There are a number of important findings from the Ryerson study and Prof. Wiseman's research which could be used on programmes like Remploy developed at Nottingham Trent to help people with disability to "break the glass ceiling".

4.4 The educational system

The importance of matching the educational system to the future needs of society was highlighted at the Toronto Training Board. Without proper planning society can face a shortage of the skills it requires or find people are not able to cope. The study has considered training for those at the level of coping with society today, through to advanced management. In the UK we seem to have invested in computer training in schools, and for adults many libraries run courses on adult literacy and computing skills. This section will focus on higher education.

The trip has raised a number of questions about where tertiary education is going. What is the purpose of University today? The Government has a stated aim of widening participation and encouraging more young people to enter higher education. A main tool for this is the Foundation Degree which is equivalent to studying for the first two years of a university degree. Widening participation is laudable but the incentives for universities to keep people who do not make the grade are dangerous to the University brand. Working at the interface between what the corporate clients want and what Universities are prepared to deliver within their systems is interesting.

On the trip I read "Rich Dad Poor Dad" by a self made millionaire who had been through the education system and criticises the approach in a highly constructive and informative way. He critiques the focus on specialisation and emphasises the need for an analysis and flexibility to adjust to market opportunity.

A while back I generated a way of getting a weak student through an MBA project which was bordering on fool proof and based on using a highly focused approach. Prof. Cooke fortunately talked me out of publishing it as in academic circles it would not have been appreciated. I now fully agree with him. The approach encourages the student to be highly specific and follow a rigid research method that will meet the marking criteria.

Perhaps today we focus too much on producing a standard product, a bit like a catalogue diamond ring. Given a large valuable diamond we would probably crush it to meet the standard. We need to look at the students and work with them to bring the best out.

The US has two types of university, the first focuses on research the other on training people for vocations. I see these as having equal value but very different learning outcomes. As a generalisation our universities train people to understand rather than to do which is perhaps why there is a growth in corporate training.

The experience in Canada where companies are moving towards the corporate university model is concerning. It can become elitist, and focus on "this is what we do" rather than training the future manager to understand why. Perhaps this is a wake up call to consider the future of adult education to meet the changing needs of our society.

5. Conclusion and next steps arising from the Fellowship

5.1 Conclusion

It is possible to provide cost effective work-based management training to move people into management positions. The use of coaching and mentoring can play a major part in achieving this. As discussed this is the fuel to power the engine to take off as detailed in chapter 3 but this is only part of the story. Removing the barriers society has put in place that block people with disability from moving to management position is likely to provide a more cost effective solution although this may be unpopular in the short term.

The main benefits have been the unexpected discoveries and these are as important as the original aim itself. It is vital that the barriers are removed to enable management training to be effective and to yield the return on investment society is making in training people with disability. The systemic issues are complex and a new strategic approach is needed. This needs to take a long term view rather than shifting the problem between different government departments.

Looking at the disabling bullet project in a few seconds I had pulled together a strong financial justification for the project. It is brilliant and could never have worked without a strong medical doctor influencing the hospital and community psychologists to pull together the research. I hope to put the project to ODEP in the hope further research is done in this area. Quite simply it is extremely cost effective and the results should be captured while the team is still potentially around on a consultative basis.

The Churchill Fellowship concept stresses the importance of the benefit to the Fellow. This is still unfolding but I am behaving and seeing things from a very different perspective. I am far more pragmatic. Rather than feeling I have to be in control I now observe the environment, see what I can and cannot influence then play the cards dealt to the best of my ability. This has made me considerably less stressed than I would have been before departure.

When the meeting in Calgary fell through I was disappointed. In hindsight it was probably for the best as I needed to reflect. The instructions from the Churchill Trust were to make time to meet people and to reflect, this is surprisingly important and a practice I will continue.

5.2 Information dissemination

The report will be sent to the people I have met on the trip for comment. After amendment it will then be sent to a wider audience again seeking comment. From this it is hoped a number of key themes will develop and be worked on with interested parties.

Prof. Cooke and I have already discussed the idea of developing a joint book with our combined findings from our Churchill Fellowships. I also hope to present and discuss the findings with Remploy and other interested organisations, including presentations at Universities.

The findings will be built into courses we are currently running at Nottingham Trent University. Following completion of my Teaching Certificate I expect to present some of the findings at an international teaching and learning conference, to be held at Nottingham Trent in 2006, plus provide a paper for publication.

Now my thinking is clear a press release has been prepared and will be distributed through the Nottingham Trent University Press relations department as well as the Winston Churchill Memorial Trust.

5.3 A final reflection

I would recommend to anyone to seek this once in a life time opportunity. I have been outside my comfort zone but it has been an amazing experience.

The key findings have been highlighted in chapter 3 and how I met the aims of the project are covered in chapter 4. What is interesting is the recommendations and areas for further work took three times more space than concluding the aim of the original project. This reflects the finding of the research.

There are inherent dangers in just focusing on techniques for work based learning. A holistic approach is needed. How will work based learning prepare the workforce that is required by society in the future?

The pressure the current welfare system is currently under and the growth of demand for the service is alarming. This will increase! An ageing population, obesity and the growth in substance abuse will result in an increased number of people with disability. Perhaps the greatest danger is Crystal Methamphetamine. The pressure on the welfare system will require a systemic change in the way Governments approach disability. An issue where the principles of what needs to happen are simple but due to the legacy of the processes and systems this is likely to be complex and require a cross discipline working party. In addition there is a need to educate society and encourage greater integration in the work place of people with disability. This is probably best achieved by winning hearts and minds through a public relations campaign.

The report has been completed but I am sure the enjoyment of the Fellowship will continue as we work through the findings. I aim to make sure the benefits of the Fellowship do not just stop with me.



Sir Winston Churchill, Washington DC, USA

Appendix 1

Extracts from the presentation at the University of Illinois Urbana-Champaign

<p style="text-align: center;">Area 1</p> <ul style="list-style-type: none"> • Gather information on the experience of other mentoring programmes • USA and Canada are thought ahead of the UK in coaching and mentoring • How does (or does this relate to other work based learning)? • Identify and discuss pitfalls <ul style="list-style-type: none"> – Scope for development in the organisation – Raising false hopes / expectations 	<p style="text-align: center;">Initial findings Area 1</p> <ul style="list-style-type: none"> • Counselling Mentoring Coaching problems with definitions • Issues of reasons for doing mentoring <ul style="list-style-type: none"> – Develops mentee and mentor – Public relations – keep on political, business agenda – Tick box – To be doing something • Identify and discuss pitfalls <ul style="list-style-type: none"> – Systems issues! Return to work and issues of benefits e.g. health care. See area 3 – Link to positions available in organisation – Raising false hopes / expectations • Informal learning and luck!
<p style="text-align: center;">Area 2</p> <ul style="list-style-type: none"> • Should this relate to traditional structured training / college teaching? <ul style="list-style-type: none"> – Coaching without a traditional course has resulted in some excellent results • Should it be just linked directly to work <ul style="list-style-type: none"> – Noticed that by addressing other personal areas while coaching progress at work improved. 	<p style="text-align: center;">Initial findings Area 2</p> <ul style="list-style-type: none"> • Should this relate to traditional structured training / college teaching? <ul style="list-style-type: none"> – Coaching without a traditional course has resulted in some excellent results – Peer based mentoring pairing good and weak students at junior schools has demonstrated improvements for all parties – Are we just trying to formalise something that would happen naturally? • Should it be just linked directly to work <ul style="list-style-type: none"> – Mixed results to date.
<p style="text-align: center;">Area 3</p> <ul style="list-style-type: none"> • Understanding society and disability <ul style="list-style-type: none"> – Do nothing – Hand outs / Rights – Integration and acceptance in society • A growing issue with an aging population <ul style="list-style-type: none"> – Is the current approach sustainable? – Does or can social service provide adequate support • Could a network of mentors with a disability work with others who have recently incurred a similar disability? 	<p style="text-align: center;">Initial findings Area 3</p> <ul style="list-style-type: none"> • A growing issue Disability and an aging population <ul style="list-style-type: none"> – There is informal awareness in key areas that the current approach is not sustainable? – Current structures are struggling (employment, benefits, housing, transport ...) – Huge political and financial “time bomb” – Huge turf issues between Government departments – Vote winning???? Perhaps “not on my watch” • Could a network of mentors with a disability work with others who have recently incurred a similar disability? ODEP – established and 6 projects