

PROPOSAL TEMPLATE FOR APPLIED INQUIRY PROJECT

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Cohort Number:		Student Email:	
Phone (Day):		Phone (Eve or Cell):	
Faculty Mentor (FM): Dr. C Kisiel		Project Advisor (PA): (as approved by Faculty Mentor) Dr. Pamela Meyer	
FM Email:	ph:	PA Email:	ph:
Student's area of practice re. educating adults: Corporate training, with specific emphasis on leadership development programs for adult learners			

See MAEA Guidebook & forms website; consult with faculty mentor for more details.

Phase I (EA 505 or 507). Date approved by Academic Committee: _____ (Faculty Mentor submits grade of PA)

Phase II (EA 506 or 508). Date approved by GSPRC _____.

Grade for Phase II authorized by GSPRC upon approval of complete proposal; grade of PA posted by faculty mentor.

The AIP Proposal is organized into two phases and developed in consultation with your academic committee. Phase I (EA 505 or 507) concerns the nature and focus of the project, along with a review of the literature (sections I & II). Phase II (EA 506 or 508) concerns the plan for design and implementation and anticipated presentation of the final work (sections III & IV).

The Phases may be registered for in the same or separate quarters. Note that you are likely to be drafting sections of both phases simultaneously. Please use the guiding questions that follow as the outline for your Proposal. The assessment form (to be completed by your Faculty Mentor and Project Advisor) is located on the website: <https://snl.depaul.edu/student-resources/graduate-resources/Pages/special-documents-forms-and-templates.aspx>

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The MAEA Applied Inquiry Project (AIP) is the culmination of your learning in the program. As such, the project will demonstrate that you can apply the knowledge, skills, and abilities that you have gained from your graduate study to a practice-based project focused on educating adults. It should draw on the foundation you have already built—review the sources you were introduced to, and the work you have already done, in your prior courses. For your project, choose something that matters to you, connects to your practice, and will be relevant and useful to a primary user audience.

The PROPOSAL will serve as your roadmap for the planning and implementation of your project. Set your compass for how this project can make a difference and for whom. **Please use the guiding questions that follow as the template for your Proposal.** You can download and save the template as a word doc. See the MAEA Guidebook for details on the role of your academic committee and review, assessment, and approval processes.

Key Terms

Applied: Practical, useful, influences change/improvement

Inquiry: Thinking strategically about problems and situations; seeking multiple data points; engaging in critical reflection on your experience; checking out working hunches; changing your mind/approach based on new information

Alignment: Each element of the proposal and final product(s) influences the other. As your work unfolds, monitor the links between and among the elements and adjust accordingly. Alignment is an iterative process, so you can anticipate the draft-redraft process as you obtain feedback from your academic committee.

Samples of Proposals and Final Products

See: <https://snl.depaul.edu/student-resources/graduate-resources/Pages/graduate-writing-samples.aspx>

GUIDING QUESTIONS/Proposal Template

The questions below serve as a template for your Proposal. Consult with your faculty mentor and project advisor on a regular basis. Locate resources that can help you with writing mechanics, organization, and correct use of APA. Keep in mind that the AIP is not a conventional master's thesis or academic research paper. Use this template, not those from another program or website.

Section I - Basic Shape of the Project

1. ***Working Title:*** The title should convey the essence of your project. Use key words—imagine someone is searching for information about your topic. The title should lead them to your project.

Developing the New Leader through Competency Models and Transformative Learning

2. ***Description:*** Orient the reader to what the project will be about (approx. 2-3 concise paragraphs).
 - a. As you frame the project, think back to your core courses about helping adults learn. What type of project is this-- does it mainly involve designing, assessing, evaluating, and/or facilitating learning... or, some combination?

- b. Establish the boundaries and scope of your project. Be clear about the starting and ending points (i.e., from what-to-what?) For example, perhaps your project—
- Is the start of something new so you want to pilot/field test the new venture, or
 - Revolves around something that is already underway, and you want to take it to the next level or build in another component, or
 - Is an important slice of a more complex piece of work, or
 - Has already been implemented and now you want to find out how well things have worked and what might be changed/improved
- c. Include an explanation of your specific connection with this project and why it matters to you.

I have been in HR leadership for almost twenty years, responsible for creating meaningful employee development programs that ensure retention of core talent. In my experience, corporate leadership training has historically been conducted in one of three ways:

***Informal discussions with managers regarding skill gaps**

***Intense 1-day workshops that offer a significant volume of content on a topic**

***Online training through a learning management system which also provides solid content but little networking opportunities**

All three of those approaches have limitations and challenges that dilute the growth opportunity of the employee.

In addition, training for individuals assuming managerial positions for the first time has typically been after-the-fact. In other words, an individual shows particular prowess at the skills needed for the job/department, and that capable individual is promoted to manager of the department. Unfortunately, the manager role typically requires unique and widely different competencies than the department functional role, and there is no guarantee that the capable individual will have those new and additional skills.

Lastly, prior experience has suggested that there are some preconceived ideas from high potential employees about the skills and competencies needed to be a manager before the promotion is received. An important part of transformative learning approach to this program will include an examination of some of those assumptions and preconceived ideas, and allowing each learner to create his/her personal talent brand related to leader competencies.

The goal for this project, then, is to develop and implement a new training program targeted to those capable individuals, and prepare them for future managerial / leadership positions before they are actually assigned to the manager role. This approach solves the following situations:

*** Consistent training message assures that all team members are learning the same information on best practices, rather than being dependent on the prowess of the individual's manager.**

*** Training consists of monthly modules featuring one leadership topic each month. The establishment of a learning community within the curriculum will be a critical goal/objective.**

*** Training is facilitated and offers numerous opportunities for collaboration, peer coaching, experience sharing, and practicing, all of which are aligned with adult learning best practices.**

*** The curriculum includes topics which develop managerial skills, and also will include relatively new concepts such as corporate agility, intrapreneurship, etc.**

*** Course design focuses on concepts related to transformative learning approaches, including challenging perceptions and beliefs, reviewing assumptions that impact critical thinking and decision making, and providing alternative approaches towards leadership and corporate citizenship. Course design also encourages life-long learning and learning agility concepts by offering supplemental resources and tangential topics that can be independently explored by the learner.**

While there is a definite need for this program in my practice area, I am also interested in this topic and

program on a personal level. As mentioned above, I have been involved in human resources for over 20 years. I am most passionate about developing team members and providing opportunities for them to reach their potential. In a similar program piloted many years ago, eight team members were selected for an emerging leaders program I designed for that practice area. Within one year, three were promoted to leadership positions within the company. The program made a difference in their lives, and I received tremendous personal satisfaction in watching them grow professionally over that first year.

So, while it is an important retention and development strategy for my practice area, it provides a great deal of personal satisfaction when a team member is promoted because of increased competence.

3. **Audience:** Identify who will be the primary user(s) of your final product. (One paragraph).
- a. In keeping with the applied nature of your project, think of the primary audience as ‘the user’—the person, group, and/or body who will make use of your work. In the case of reflective practice projects, the primary audience could be yourself (e.g., reflections on your journey as a trainer or as a facilitator of learning).

Note: Your academic audience is a given, i.e., your academic committee and the Graduate Student Program Review Committee (GSPRC). This template includes the expectations of your academic audience.

I am implementing this project in my practice area beginning in September 2016. In my current role, one of my job responsibilities includes developing, implementing and facilitating a leadership curriculum for emerging leaders/high potentials, individuals who have recently assumed their first managerial role, and ongoing best practices training for seasoned managers. While the focus of this project will be targeted to the emerging leaders group, there will likely be synergies and training that can be used for all three groups. The emerging leaders’ population consists of team members who are early in their career and have been identified as high-potential team members by their managers. The program is designed to help build the ‘bench’ of team members who could be considered for future leadership opportunities within the company, and ensure that the team members have received some leader/manager training before they step into the new role.

4. **Deliverables for Your Primary Audience:** Identify (briefly) what you have in mind as the final product for this project (see also Section 4 where you will add more details about the final product as a whole).
- a. Keep in mind the frame and scope of your project
 - b. Consider the style and tone that will be appropriate for your primary audience
 - c. Consider what materials (artifacts) will be most useful to this audience.

The deliverables for my primary audience will include:

***Schedule for 2016-2017, including monthly topics, resources, etc.**

***Assessment tool which will be utilized at the beginning of the program as well as at various intervals to determine progress**

***Custom Course / Backward Design Template / Symphony charts for twelve topics, including objectives, main themes, activities, and individual course assessment**

***Workbook for participants to house pdfs offered for each course, talking points, additional resources, and opportunities to develop critical thinking.**

***Online curriculum which offers additional material, a discussion board, and a vehicle to house course materials for review.**

5. **Elements of Better Practice:** Throughout the MAEA program, you have been examining ways in which you are developing and applying the three Elements of Better Practice (agency, flexibility, reflection). Discuss how

this project will draw on your capacity for these three elements (see MAEA Guidebook for the facets for each element). (1 paragraph for each element).

Quite simply, the MAEA program has been transformational for me, and I want to develop a program that offers the same opportunity to others. Every course I have taken has taught me Flexibility, specifically the opportunity to make connections between the theory and exercises offered in class, and apply what I learned immediately in my practice area.

Through this program, I have been inspired by the personal growth that is possible through Reflection and constant challenging of assumptions. Course and program design, therefore, will offer practical learning which can be applied to daily lives, review of assumptions and understanding of past experiences, and the need to seek out new information that might change a point of view.

Lastly, I have seen the benefits of actively engaging in Agency, and encouraging the self-directed attributes of the adult learner. The program includes many different types of learning vehicles, some of which will be facilitator-led but a great deal will be available to learners only if they choose to find the materials or participate in the extra exercises and work. The program also uses evaluations and assessments to monitor progress, both at the program level as well as the individual learner level.

Section II – Literature (re topic & type of project)

6. You will be drawing on the literature to identify the main ideas-theories-concepts-models that are linked most directly to your topic. Provide a thematic review of this literature that shows how you anticipate linking practice-theory-practice.

a. Refer to courses where you did thematic reviews, such as Finding & Managing Information, Conducting Practice-based Inquiry, and Enhancing Practice with Theory in Adult Learning. For the Proposal, your review should be several pages in length, but doesn't need to be exhaustive at this stage; you will continue to update your literature review as you carry out your project.

This program and curriculum incorporates almost every course that I have participated in. For structure and design of facilitator-led courses, the project draws heavily on concepts from Facilitating Adult Learning, specifically by offering exercises, group work and other methods which provide the adult learner with opportunities to 'come to know' the material and focus on application. The curriculum also has been designed using the Backward Design model which was discussed/introduced in Designing Adult Learning course. Because the curriculum must be proven to be effective, assessments will be offered regularly throughout the curriculum, with specific direction offered through the Assessments course. Lastly, much of the subject matter and topics for the curriculum draws from best practices and teaching from my coursework in Corporate Agility, Motivation, Leadership, Creativity and Ethics.

7. You also will be drawing on the literature that informs and supports the type of project you are doing (approx.1-2 pages).

a. Identify and discuss the literature that informs and supports the type of project that you will be doing (e.g., design, facilitation, assessment, evaluation, reflection on your own practice).

Overview:

Literature and sources is used in two ways. First, significant input from leading adult learning sources has been used to design the program from a holistic view, and focuses on the following key areas:

- Adult Learning Theory**
- Transformative Learning Theories**
- Backward Design Methodology**
- Assessment best practices**

- How to Develop Critical thinking
- Neuroscience and how the brain builds connections

Literature and scholarly work from my SNL courses also serves as the foundation of the subject matter for individual course design, including:

- Thought leadership on various business topics such as change management (Kotter), corporate agility (Meyer), etc.
- Critical management skills such as motivating others, establishing trust and identifying unique learning styles.

Specific Literature Sources (please see reference list)

Adult Learning Theory: Bloom, Knowles, Pratt, Taylor & Marineau. While the project draws from other sources as well, the four sources listed offer a roadmap for adult learning theory and my program design. The program is aligned with Pratt's Developmental perspective, with the goal of providing plenty of opportunities for individual growth. The approach to course design is mindful of Bloom's Taxonomy with the focus on design intended to promote the Analysis and Synthesis levels. Taylor and Marineau offer important insight into the adult learner's mind and approach to learning, including the self-directed nature and need to connect the learning with the real world; therefore, the program design provides learners with the opportunity to seek out and expand their knowledge in each subject area, as well as present opportunities to directly apply the learning to their practice areas.

Transformative Learning Theories: Merriam & Caffarella, Merriam and Bierema, Mezirow, Taylor & Cranton. Mezirow's theory of transformational learning challenges adult educators with the task of asking the learners to examine perspectives and assumptions about leadership and manager competencies. This training will do just that; encourage and challenge them to review existing assumptions and determine how / if those assumptions are blocking success.

Backward Design: Wiggins & McTighe provide a framework for course design, and this project uses their approach and template to identify course components such as objective, big questions, activities, etc. Most importantly, course design starts with the objective (competency statement) and build the activities and components based on the big questions that need to be answered through course material. That said, this project also includes the design of a new template which incorporates backward design principles and also identifies components important to the adult learner, such as sharing of experiences, self-directed learning opportunities, and making connections between new material and past experiences.

Assessment Best Practices: Joseph Moran's textbook, which was used during the SNL Assessment course, offers a plethora of options regarding the surveys and assessments that are regular components of the program and each course.

Critical Thinking: Brookfield, Broadbear, Colvin Clark. All three of these sources offer specific examples of how approach course design with the objective of increasing critical thinking skills. For example, Broadbear recommends that course material offer problems that are ill-structured (such as case studies or scenarios that do not have a right/wrong answer).

Neuroscience and how the brain builds connections: Knowland, Zull, Taylor & Marineau. I am personally fascinated with the study of neuroscience and how we can use neuroplasticity to guide us towards improved course design. Courses therefore offer learners an opportunity to make connections between the new material and past experiences with guided questions such as "When in the past have you had a similar situation?"

Section III - Inquiry Design

As you learned in EA 525, practice-based inquiry (PBI) can take various forms and often does not fit neatly into just one methodology. Regardless of the specific nature of your PBI, it can be connected to some elements within at least one methodology. Further, it will involve some form of collecting data/information, and will require careful analysis and interpretation to substantiate your work.

8. Identify which **methodology(ies)** — approach or perspective—that is most relevant to your project (e.g., action research, case study, ethnography, field work, phenomenology, quasi-experimental, reflective inquiry).
 - a. Describe your approach
 - b. Support your choice with citations from the literature on research methods

My practice-based inquiry includes the following multiple methodologies:

- 1) **Experimental/Action Research:** The need for this project is the direct result of a real problem or issue in my practice area. This project is designed to create a solution through a review of best practice literature, identification of variables that need to be addressed through design, the implementation of the plan within the practice area, and the need to monitor its effectiveness throughout implementation. The design of the courses and program need to be fluid. Because of the amount of surveys and assessments built in, it is important to make changes, improvements and adjustments based on that feedback.
 - 2) **Field Work:** This training program is scheduled to be implemented in my practice area beginning September, 2016.
 - 3) **Reflective Inquiry:** Participants will engage in reflective inquiry. It is important that the learners fully synthesize the material, and that will not be possible during the one-hour training. The learner reflections will be shared with me, and adjustments will be made to the program based on feedback.
9. Identify which **data gathering methods**—techniques or procedures for collecting data—you will use in this project. Consider what you are trying to find out and accomplish with this project. You are encouraged to seek data/information from multiple sources, e.g., document review, interviews, focus groups, observation, surveys, critical reflection on your own experience (prior and current). You might have been accumulating data from some of these sources before your project took shape—most likely, these ‘prior data’ (what you already know and the basis for knowing) are influencing the nature of your project.

Identify what ‘prior data’ (and from what sources) are influencing that shape of your project

- a. Identify the new data that you will be collecting, and how
- b. Consider how reflections on your own experience could be a useful source of data
- c. Consider how you will get access to participants from whom you will be collecting the new data/information
- d. Support your selection of data gathering methods with citations from the research methods literature.

Typical training at my practice area has included periodic and sporadic attempts to offer articles on best practices, informal coaching from the manager, and on-the-job training (aka learning from mistakes). In addition, there is a significant gap in developing a pool of talent that can meet the leader and manager needs as a result of attrition, business need, or change in industry practices. The pool of talent that participates in this training represents team members who have demonstrated a high degree of potential. It is the challenge of the corporation to keep that engagement high and provide development opportunities, but also ensure that the team members are engaged in meaningful work. High potentials tend to be

ambitious and are anxious to achieve the next level in their career before they are ready or before a suitable position becomes available.

The data gathering methodologies will include the following multiple methodologies:

- 1) **Prior data:** I have led similar programs in the past, and have already had experience with what works and what doesn't with regards to the topics covered, the amount of time spent in the various components (lecture, group work), and the types of activities that produce high engagement. In addition, my practice area has some history with training programs (though not with the same participant focus), and can offer additional data on the successes and failures of past programs for this corporation.
- 2) **Interviews:** Interviews will be conducted with critical stakeholders to gain their support regarding topics covered and ensure that the program meets corporate needs. It is important that this training time be viewed as value-add, that there is some relationship between the time spent in training and an increase in productivity, professionalism, leadership, etc. Many of the team members are non-exempt, so the hours away from their normal job are carefully reviewed.

At the time of this writing, interviews are scheduled or have already taken place with:

- a. EVP of Regional Office
 - b. SVP of Operations
 - c. Manager of Change Management
 - d. Multiple Directors for Operations, Admissions, and Academic Services
 - e. Participant interviews will also be held to set expectations for the program and determine commitment
- 3) **Focus Group:** Participants in this program must be recommended by their managers, then approved by location executives. After the first session, a focus group will be offered to chosen participants to ensure that their experience with the program is as expected, that they recognize ways in which the learning can be applied. In addition, the hands-on activities and group work may be a departure from normal training to date, so it's important to have some opportunity outside the training time to discuss activity objective success/failure.
 - 4) **Observation:** Facilitation of the sessions includes observation of the participant experience.
 - 5) **Assessments:** There will be two types of assessments:
 - a. Learners are given self-assessments at the beginning of the program and at intervals throughout the program. The self-assessment will ask them to rate their competence in specific leadership skills that are covered by the curriculum. This self-assessment will provide data on whether the individual learner believes that there has been growth. If ratings do not change/improve after a six month period, an individual interview will be scheduled.
 - b. Managers are asked to rate their team members in the same leadership skills at the beginning and at various intervals. Also, there will be open-ended questions that ask the manager to identify specific areas of improvement demonstrated since training began.
 - 6) **Surveys:** Multiple surveys will be offered throughout the program to ensure that individual courses, components, and the program in general are applicable to their professional development and work day.

10. Identify **data analysis**— describe the approaches and tools you will use to help you interpret and make sense of the data.

- a. **Surveys for course effectiveness** are conducted after each course, asking participants about the effectiveness of course design and material as well as overall participant experience. The survey uses a 5 point scale. Scores are aggregated and each course is given a 'grade' based on those surveys. Scores that are 3 or under will result in a course review.
- b. **Assessments are conducted using the following two methods:**
 1. **Self Assessment.** Participants are asked to assess their competence in 12 leadership skills in the first session. The self-assessment will be offered at regular, six-month intervals to determine

- progress. The self-assessments will be shared with me, at which time a trend analysis will be done.
2. **Manager Assessment.** Managers of participants are given the same list of leadership skills and are asked to assess the participant at the beginning and at regular intervals. The assessments identify individual growth as well as overall program effectiveness.
 3. **Case study review:** Participants are given two case studies and asked to write a summary and plan. The same case studies will be offered at regular, six-month intervals, with the expected outcome of richer and more detailed analysis and solutions as they proceed through the program.

Section IV - Deliverables for the (Whole) Final Product

This is an opportunity to practice your own form of ‘backward design’—recall that in EA 516 and EA 526 you learned how to formulate the desired outcomes, working both backwards and forwards from the outcomes. Refer back to Section I. Your final product is likely to consist of several parts/sections, some aimed at the primary user audience and others at the academic audience. It may be helpful to think of your final product as a portfolio with tabs. While your final product will come into sharper focus as you carry it out, anticipate now what it might look like at the end.

Keep in mind: *what is the story that you want to share, with whom, and in what forms? What will be your specific deliverables?*

You are encouraged to draft a tentative Table of Contents or a mind map of the final product.

11. Identify how you might present the body of your work that is aimed at your **primary audience**.
 - a. Consider what the primary audience needs to know about the relevant literature, inquiry process, what you have found out/have to offer, what you recommend for the future (and the like)
 - b. Keep in mind that products need not be limited only to written pieces

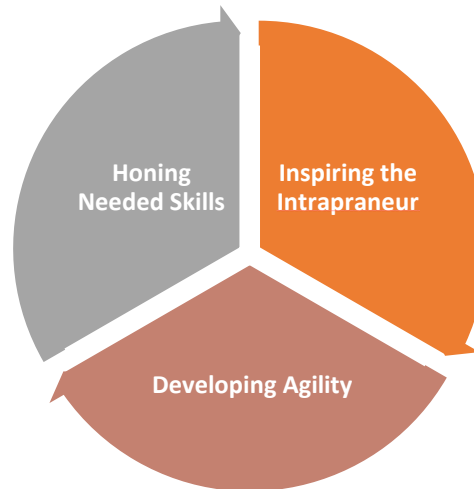
The final deliverable consists of a complete training program for emerging leaders, with the following sections or topics:

- 1) **Competencies:** The first step in the program design has been to identify specific competencies of a leader to ensure that the objectives, topics and deliverables develop leadership potential. The research resulted in a list of core topics that is used as the foundation for the program design. The next critical step is to seek out best practices in each of the competencies and identify themes for course design. (See Figure 1)
- 2) **Design of program on a holistic level:** The next step ensures that the program includes components that are critical and unique to the adult learner, such as the desire to learn from others, opportunities for self-reflection and application of the material, the ability to make connections with new material through past experiences, and to establish a desire for life-long learning.
- 3) **Design of the program on an individual course level:** Each course is designed based on the Backward Design model and includes an objective/goal, course material and resources, activities, and opportunities for reflection and sharing of experiences.
- 4) **Activities:** While activities also will be part of the design process, additional thought and research has been added which includes consultation with corporate executives about specific issues and challenges. Those discussions will continue to shape the activities to ensure that the group work is immediately applicable to participant’s practice area.
- 5) **Assessment:** The program design includes several assessments:
 - a. **Program assessment.** It is important to demonstrate to corporate leadership that the program has met its objective of developing future leaders. An initial assessment has been designed to determine baseline knowledge and competence, and will be offered at intervals through the program to determine progress.

- b. **Course assessment.** Each course has an assessment regarding participant experience and learning.
- 6) **Platforms:** While the focus of course delivery will be through facilitation, the program also offers an on-line component and houses additional materials and discussion boards. Participants are encouraged to share or reflect on the topic of the month with other members of the group.

A Table of Contents also is attached.

Figure 1



- 12. Consider how you will show your **academic audience** that you have made good use of the literature and carried out systematic inquiry. Appendices might be the place for the more comprehensive work that is not necessary for your primary audience.

I am utilizing almost every course for this project, and have an extensive list of texts, articles and facilitation examples that have been sourced by those courses. My final paper will include a summary of each course and how that coursework was used in the design of my program. Below is an example, though the final summary will offer considerable detail:

- a. **Developing Identity:** Use of Pratt's model and focus on the Developmental model for course design and facilitation.
- b. **Facilitating:** Use of symphony charts and guided conversation to provide course structure, as well as the incorporation of many facilitation methods offered during the class.
- c. **Motivation:** Material and academic research will be included in specific courses related to employee motivation. In addition, shaping techniques will be used to encourage learner participation and engagement.

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Table of Contents

Overview: Why is this program important?

Program Parameters: What are the areas of development that will be the focus of the learning?

- 1) Intrapreneur: The new leader must act like an owner and consider problem solving and growth exercises within the context of the entire enterprise.
- 2) Corporate Agility: The new leader must be able to quickly assess the impact of changes to the market, corporation, and industry, and be well versed in the best practices for agility in the workplace.
- 3) Leadership Skills: The new leader must be well versed in the more traditional leadership competencies such as Creating a Vision, Motivation, Trust

Program Design Objectives: The program design will include important components to pedagogy as well as corporate agility and intrapreneurship:

- 1) Create a learning community
- 2) Program structure encourages adult learner sharing of experiences
- 3) Program should provide connections with past experiences
- 4) Program should increase critical thinking skills
- 5) Program should include opportunities for individual and team reflection, as well as opportunity to examine perceptions and assumptions
- 6) Program offers opportunities to create a network
- 7) Program offers opportunities to learn the business

Individual Course Design:

- 1) Individual course design will follow the principles of backward design
- 2) Individual course design will include components of corporate agility
- 3) Individual course design will include a Blended learning approach
 - a. Facilitator led course
 - b. Online course

Assessment/Evaluations

Program Data Analysis Methodology

Exhibits

- New Course template
- Symphony Chart example
- Assessment
- Survey