

Teaching Leadership in a Relational Context: Using Action Learning Teams and Projects

Kathy E. Kram

Boston University School of Management

OVERVIEW

The design for our MBA elective “The Leadership Challenge” includes cognitive, emotional and relational learning opportunities that together enable students to build new leadership capabilities. During this session I will discuss elements of the course infrastructure that foster high quality connections among students for the purpose of supporting their personal and professional development (i.e. leadership development). [Appendix 1]

COURSE INFRASTRUCTURE

The core elements of the course infrastructure include regular **self-assessment and 360 feedback** related to leadership motives, values, mental models and behavior, **action learning teams** of 5 students per team, individual **action learning projects**, and **4 written reflective writing assignments**. In addition, the course includes leadership theory and cases that illustrate and parallel personal learning goals on a weekly basis. Norms of confidentiality, trust, risk taking, support, mutuality, and accountability, within each team and in the classroom as a whole are essential to support members’ development.

Action Learning Teams. The primary purpose of each action learning team is to 1) collectively reflect on assessment data and course concepts, 2) coach and support each member’s learning and development, and 3) hold each other accountable for progress on individual action learning projects. At each class, **ALTs** will meet for 45 minutes. Guidelines on team contracting, effective norms for learning groups of this kind, effective peer coaching in groups, and mechanisms for assessing progress along the way are provided (based on work by Bill George, 2009; Judy O’Neil and Victoria Marsick, 2007; Joe Raelin, 2010 ; Polly Parker et al, 2008). [Appendix 2]

Action Learning Project. By week 4 students are asked to identify one specific aspect of their leadership practice that they would like to strengthen during the semester. With help from their action learning teams, each student creates a development goal as well as an action plan to accomplish the goal which includes individuals they will want to enlist to support their efforts. The project should involve taking a leadership role and engaging in some form of action to improve a situation at work, in school, in your community, or in another person’s life. It should be implementable within the semester, and students should be able to meaningfully measure or document progress by the end of the term.[Appendix 3]

Reflective Writing Assignments. Students are encouraged to keep a journal throughout the course, and are given suggestions on how to do so. Four times during the semester, they are required to submit a 4 page double-spaced paper in which they reflect on their ALP, ALT and assessment data, applying relevant concepts from class readings and discussions. Guiding questions are provided, and they are expected to identify key lessons learned at the end of each paper.[Appendix 4]

LEARNING OUTCOMES

Students develop self-awareness, reflective learning skills, relational skills and particular leadership practices of interest to them. However, the breadth and depth of learning is highly individualized. As a result of their experiences in their action learning teams, most know the value of building high quality relationships for the purpose of learning about leadership and developing leadership capabilities.[Appendix 5]

Appendix 1



THE LEADERSHIP CHALLENGE

OB848 F1
Spring 2012

Prof. Kathy Kram
Shipley Professor in Management

OVERALL PURPOSE

The focus of this course will be on leadership from a variety of perspectives: leadership at the top, middle, and lower levels inside organizations; vertical and shared leadership; core leadership practices; boundary-spanning as a primary challenge for leaders in a global context; leadership development as personal development.

The course design is based on the following assumptions:

1. Leaders develop themselves, they are not born that way; much of leadership, therefore, is personal development.
2. This course is appropriate for those who are or want to become leaders.
3. There is no one formula for successful leadership. Leaders have a broad repertoire of internal capacities and behavioral skills to transform situations for the positive, frequently well beyond what conventional wisdom held was possible.
4. Learning to be a leader is an iterative process of systematic reflection, taking calculated risks strategizing on implementation, and being alert to the effects.
5. Knowing (from theory and research) what other leaders have done, how they did it, and why, greatly enhances the process of developing leadership capacities.

COURSE OBJECTIVES

This course has the following objectives:

1. Explore the nature of leadership theory and practice to better understand what constitutes effective leadership and what does not.
2. Appreciate why leaders and leadership are needed at all levels in organizations.
3. Create a plan for personal leadership development as an initial step in developing your own leadership capability.

4. Increase your confidence and your impact and influence as a leader in whatever area you decide to focus your leader behavior.

REQUIRED COURSE MATERIALS

James M. Kouzes & Barry Z. Posner, (2007) The Leadership Challenge. (K&P)

Karen Kirkland & Sam Manouagian (2001) Ongoing Feedback: How to Get It,How to Use It

There is a packet of readings available from SMG copy center or from Study.Net if you told Amanda Miller that you wanted a digital packet. We are using an online version of the Kouzes and Posner LPI Leadership Practices 360 feedback instrument. This package includes two workbooks, as well as a detailed report on your leadership approach from a group of observers that you identify. The cost is \$108 and you should pay for it at the SMG copy center. Students find this tool very informative and worth the expense.

LAT: Leadership Assessment Tools. These are online assessment tools that have been designed to support your learning at each class. Links will be provided in weekly emails.

HBR articles listed on the syllabus can be accessed online at our e-library. Go to: <http://sfxhosted.exlibrisgroup.com/bosu/az> and search for **Harvard Business Review**. For full text access, select the link to *EbscoHost Business Source Complete*; it is the best provider on the list.

All of these are essential for your learning; they will serve as the basis for much of our work. None of the readings is conceptually difficult; in fact, sometimes in their simplicity they seem almost obvious -- until you think about what they say. It is very important that you keep up with the readings and workbook activities. We don't have quizzes on readings, but the grade you receive on class participation, learning logs, peer feedback, a team presentation, and your final paper will reflect your mastery of the content.

THE GRADING PROCESS

Your overall grade for the course will reflect your participation in the learning community and the quality and timeliness of your work. The weights for various activities will be as follows:

- 45% Learning Logs (each worth 15%)
- 30% Contribution to class discussion and peer learning*
- 5% Team Presentation of Lessons Learned
- 20% Final Paper

Input to Participation Grade:

1. Peer Assessment of Effective Facilitation 5%
2. Peer Assessment of Contribution to Learning 5%
3. Peer Assessment of Active Integration of Course Concepts 5%
4. Professor's assessment of individual's contributions 15 %

Appendix 2
Guidelines for Action Learning Teams (ALT)
OB848 The Leadership Challenge
Spring 2012

The primary purpose of your Action Learning Team is to (1) collectively reflect on assessment data and course concepts, (2) coach and support each other's learning and development, and (3) hold each other accountable for progress on individual action learning projects. At every class, action learning teams will meet for 45 minutes (and sometimes longer).

An opportunity to practice leadership

Teams will decide a process for rotating members in to the team facilitator role. The team facilitator role provides an opportunity for all members to experience a formal leadership role at least twice during the semester. The facilitator will focus the agenda for the meeting and keep discussions on track (see handout on *Effective Facilitators*). While the team facilitator will be assigned the formal leadership role, it is also the responsibility of others to exercise informal leadership in their own way.

At the end of the semester, you will be asked to rate each team member on their effectiveness as a leader in their formal leadership role. Your contribution outside the formal role will also be assessed by your peers on two dimensions: (1) your application of course concepts and (2) your contribution to the team's learning.

Developing a team contract

At your first meeting (class 2), you will be asked to develop a team contract. Strive for agreement on the following issues:

1. Your shared purpose
2. The resources/expertise provided by team members
3. Norms and procedures that will be followed (e.g. facilitator and scribe rotation; how leadership of the team will be managed; norms regarding confidentiality, conflict, communication, process losses etc.)
4. When and how progress and effectiveness will be assessed

To insure that your team functions effectively, there are five guidelines for members of this kind of learning group that have proven to be very effective in similar groups of executives who gathered to develop their leadership capabilities¹. Please review these with your team, discuss any that may be unclear, and add any to the list that you think would be helpful.

¹ Adapted from PDT (Process Designed Training), University of Illinois, Chicago, May 15, 2006 /rev 9 AUG 06 Copyrighted , Jim Liataud, Liataud Graduate School of Business.

(1) WHEN OTHERS SPEAK:

I will listen with my eyes and body, and understand that side conversation, paper rustling, note taking, interrupting, or in any way diverting from their attention, is extremely disrespectful.

(2) WHEN I SPEAK:

I will keep working on being more specific and explicit, doing my best to not repeat myself, nor repeat what others have said. Instead of advice, I will speak from my own experiences, and my beliefs, by sharing my own feelings and perspectives. I will speak for myself only, using “I” statements, and never you, us or we. And I will do my best to speak twice only after everyone has spoken once.

(3) WHEN I ASK QUESTIONS:

I will first acknowledge and validate what has been said. If I have a counter view, I will state my position or prejudice first, so they know my position and reason for the question prior, and then I will ask my question. I follow this procedure so they know I respect their position; I am not countering their position, and only wish to provide another viewpoint from my position. I will also work hard to not form early conclusions, because that will inhibit my hearing the full message of what the speaker is attempting to convey. I will do my best to focus first on the message, rather than its words or its pieces.

(4) HOW I WILL THINK:

I will remember to serve my group members’ best interest first—what I can do for them, rather than what they can do for me. This habit will eventually allow me to better understand the best interests of my customers, my superiors, my peers, and my employees—and always prior to expressing mine. I will provide safety by never countering, attacking, or demeaning any statements made by anyone. I will assume everything said in this Group is confidential. I will commit to that confidentiality, and nothing will ever leave that room, no matter how inconsequential.

(5) MY COMMITMENT TO THE ATTENDANCE RULES OF MY GROUP:

I understand that in OB848 my primary commitment is to my Action Learning Team. I commit to making all meetings, and I shall make that commitment as long as I’m a member, barring medical or family emergencies. I understand that mandatory attendance is required to be a member, and I accept all responsibilities that come with missing that commitment. I also understand that to be late to any commitment is extremely disrespectful, and I accept the responsibilities that come with being late.

Expected Outcomes

All participants will increase their self-awareness, self-management, social awareness, and relationship management skills—all essential to effective leadership. These guidelines create habits of social interaction that will support members’ personal and professional development, and insure that the group functions effectively. In addition to enhancing emotional competencies and knowledge of

leadership theory and concepts, participants will define and implement an action learning project that will enhance some aspect of their leadership capability.

In preparation for the last class (May 1st) all members of your Action Learning Team will complete assessments of their peers' contributions to learning on several dimensions. These include: (1) effectiveness as group leader (5 points), (2) contribution to group learning (5 points) and (3) active integration of course concepts (5 points). Time will be allotted for feedback to members and group closure.

Appendix 3
ACTION LEARNING PROJECT

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Purpose

Action learning is an approach to learning that expands upon traditional classroom learning. One learns from working on real-time challenges occurring in one's own work or school environment. The goal is to collaborate with peers who themselves might well have faced or are facing similar leadership challenges in their world. It is an alternative to purely cognitive learning in the classroom. It also features collective reflections on actions taken, by involving peers in dialogue about the challenge at hand.

By week 4 in the class you will be asked to identify one specific aspect of your leadership practice that you would like to strengthen during the semester. With help from your peer coaches you will create a development goal as well as an action plan to accomplish the goal. It is acceptable to work on a goal that cannot be completed by the end of the semester as long as you are able to meaningfully assess your progress by the end of the term.

There are four criteria for this project:

1. It should help you progress on one or more of your leadership development goals
2. It should involve you taking a leadership role and engaging in some form of action to improve a situation at work, at school, in your community, or in another person's life.
3. It should be implementable within the next 8 weeks
4. You should be able to meaningfully measure or document progress on this project.

Here are some examples of Action Learning Projects:

Example 1 - My developmental goal is to learn to be more adaptable in unfamiliar situations. My action learning project will involve volunteering in a local homeless shelter, to serve a population that I have had little exposure to. Over the next two weeks, I will initiate contact with a local homeless shelter and ask if I could volunteer for 2-3 hours a week, over the next 8 weeks.

Example 2 - My developmental goal is to be a more effective team leader. Over the next 8 weeks I will have weekly staff meetings in which I will set an agenda that includes hearing updates from each member of my team and facilitating discussion of each members' current challenges. I will tell my team that I am working on this development goal, and ask them for feedback at two points in time, using a simple set of questions, such as "what should I keep doing?", "what should I do less of?", and "What should I do more of?".

Example 3 - My developmental goal is to improve my coaching skills. My action learning project will involve volunteering as an assistant soccer coach in my son's school. I am already quite involved as a parent and I will seek to contact the head coach to ask if I could volunteer for the next 8 weeks. I will mention my developmental goal to him and will seek his feedback and of the other students that I coach at the end of the semester.

LAT 4: Design of Action Learning Project

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The first step in defining your Action Learning Project is to complete LAT 4 online. This will ask you to:

1. In a paragraph or more, brainstorm and describe a project that you can work on through this semester, to make progress on one or more of your developmental goals. This will be the first draft of your action learning project.
2. What specific ACTIONS will you take in making progress on this project?
3. What measures or documentation would you use to measure progress on your project?

Outcome measures do not have to be limited to performance outcomes. They can include learning outcomes. Example of outcome measures include a documentation of what you learned from the project, feedback from the people you worked with, and the amount of time you put into the project.

4. What are possible obstacles or barriers that you might face?

You will get to share this preliminary project description with your action learning team during the second half of class on February 14th.

Appendix 4

LEARNING LOG GUIDELINES

**OB 848
Spring 2012**

The overall goal of the learning logs is to enhance your self-awareness. Research conducted at the Center for Creative Leadership and by members of the Consortium for Research on Emotional Intelligence in Organizations strongly indicates that self-awareness is critical to leadership effectiveness. Lack of self-awareness can lead to managerial/executive derailment.

It has also been demonstrated that when executives reflect on what has happened, their learning (and self-awareness in particular) increases dramatically. Each week you are expected to keep a log of significant events related to our classroom work---what happened, what you learned, and what actions you can take to make use of this learning.

Four times during the semester you will be asked to turn in your learning log entry as a short paper that will be graded. These papers should be, on average, 3-4 pages in length (double-spaced, 12pt font). Due dates are listed on the syllabus.

Suggested steps:

1. Consider the question(s) posed in class, and on the syllabus.
2. Consider experiences outside of the classroom that are related to the question(s) posed (e.g. at work, at home, in other classes, in your community).
3. What intrigues you? What puzzles you? What bothers you?
4. What concepts from the readings help you to frame and understand the situation(s) in a new light?
5. What are the practical implications of your analysis? How can you apply these back at work and/or in your life?
6. What are the 2-3 most important lessons that you want to remember going forward?

Criteria for Evaluation:

Self-Reflection: 1 2 3 4 5 6 7

Ability to engage in self-reflection. Specific examples are provided from personal experience. Demonstrates an understanding of the consequences of one's values, attitudes, style, and/or behavior for oneself and others.

Application of course learning: 1 2 3 4 5 6 7

Appropriate use of concepts, readings, and self-assessment data to support reflection and discussion. Identifies aspects of the course which have personal meaning or which connect

with your prior or current experience. Applies relevant concepts and self-assessment data in a systematic manner.

Action Plan: **1 2 3 4 5 6 7**

Demonstrates a willingness and ability to consider actions to develop one's leadership capacity based on reflection. Recommendations for personal action are linked to specific issues identified in the learning log; they are reasonable, realistic, and specific.

Quality of writing: **1 2 3 4 5 6 7**

Clear, straightforward writing; avoidance of generalizations and jargon; good organization of material, effective utilization of space, clarity, and logical organization of your thoughts, good use of examples, free of grammar and spelling errors.

Appendix 5

The Leadership Challenge OB848 LAT 1: Background Information

Please fill in the following information before our first class. This information will help me get to know you better.

1) Are you currently working in an organization

- Yes
- No

2) If you are currently working...

What is the name of your current organization? _____

Your current role? _____

3) Work and leadership experience. There is no requirement for you to have any formal leadership experience to take this class.

How many years of working experience have you had? _____

How many years of experience have you had in a formal leadership role? (ie. with people reporting to you) _____

4) What are your personal goals for taking this course? List up to 3 goals.

By taking this class, my goal is to...

1.

2.

3.

- 5) These questions are for your own reflection and development. At the end of this survey you can view a report of how you rated yourself.

In class, we will discuss how these questions relate to the learning objectives of the course. We will repeat these questions towards the end of the semester, for you to reflect on your progress.

Indicate the degree to which you agree or disagree with the following statements

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
1. I know a lot more than most people about what it takes to be a good leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I am confident of my ability to influence people that I lead	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. In general, I am not very good at leading my peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I know what it takes to make a work group accomplish its tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
5. I have no idea what it takes to keep a group running smoothly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. I know how to encourage good group performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. I am able to allow most group members to contribute to the task when leading a group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Overall, I doubt that I can lead a group successfully	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(These items adapted from Susan Murphy's, "Leadership Efficacy Scale", 1992.)

- 6) Indicate the degree to which you agree or disagree with the following statements

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
9. I know what it takes to develop as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. I know what areas I need to develop as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
11. I am able to achieve the development goals I set for myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. I have the necessary skills to develop myself as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. I know what prevents me from developing further as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. I know what it takes to enlist others in my own development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(These items developed by Jeffrey Yip to measure “developmental efficacy”, 2011.)

7) Your views on leadership:

Everyone has a different view on what makes for effective leadership. What is your personal belief about effective leadership?

I believe that effective leadership is about....

8) What leadership experiences do you bring to class? These experiences can include ones from work, school, family, or in your community, among others.

9) Anything else you would like me to know about you?

**The Leadership Challenge
OB848
LAT 14: LAT Reflection Form**

REFLECTION AND LEADERSHIP SELF ASSESSMENT

Indicate the degree to which you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
1. I know a lot more than most people about what it takes to be a good leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I am confident of my ability to influence people that I lead	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. In general, I am not very good at leading my peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I know what it takes to make a work group accomplish its tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
5. I have no idea what it takes to keep a group running smoothly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. I know how to encourage good group performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. I am able to allow most group members to contribute to the task when leading a group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Overall, I doubt that I can lead a group successfully	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Agree	Strongly Agree
9. I know what it takes to develop as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. I know what areas I need to develop as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. I am able to achieve the development goals I set for myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. I have the necessary skills to develop myself as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. I know what prevents me from developing further as a leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. I know what it takes to enlist others in my own development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NEXT STEPS: DEVELOPMENT GOALS FOR THE YEAR AHEAD

List up to three development goals that you would plan to pursue within the year ahead.

One or more of these may be a continuation of goals that you established at the beginning of the course.

This is a first step in defining a personal development plan for your final paper.

My Development Goals Within the next year, I will strive to...	My Action Plan What actions are planning to take to achieve this goal?
1)	
2)	
3)	