SYLLABUS FOR EDA 6925
—EXPERIENTIAL LEARNING THROUGH ACTION LEARNING—

Class Meeting Dates, Times, and Location:

Class meeting dates are on six specified Saturdays in the beginning, and other designated days we can mutually agree upon beginning: May 13th, May 20th, May 27th, June 3rd, July 15th, July 29th, and August 5th, with Individual Rehearsals from July 25th - July 28th.

Final presentations to the client will be scheduled during one of the days of July 31st through August 4th and initial client meetings will be scheduled NO LATER THAN THE FIRST END OF MAY THE FIRST WEEK IN JUNE. This means that when you have your initial meeting with the client, you should establish IMMEDIATELY with your client the date and time for the final presentation.

Set work will begin with your group MEETINGS scheduled on the following Saturdays (or on mutually agreed upon times) during the weeks of June 10, 17, and 24, July 1, 8, and 22. Each Set will be asked to send a copy of their agenda and group minutes to the professor.

The formal dress rehearsal for final presentations will be scheduled July 28th.

Class meetings will be held in room ED 113 from 8:30 am until 4:30 pm on the specified Saturdays above and at other locations as designated. When you are not meeting in class, your Set can pre-select the location and site most convenient for all of you to meet. I suggest, however, that the site be rotated to be fair to all members that are driving from different locations.

Additionally, this class requires an allocation of time for two client meetings: one to query the problem with the client and the other to present recommendations at the end of the project. You will also conduct information-gathering sessions in the field as relevant to your particular problem. The field work is extensive and requires that you allocate time for gathering and analyzing data. You can use software packages that you are familiar with such as QSR Nudist 6 or SPSS.

Professor:
Michele Acker-Hocevar, Professor
Educational Leadership
Education Building, Office 242
Work Phone: 561-297-3944
Cell Phone: 561-504-3309
Phone/Fax: 561-218-1701 (call me ahead so I can switch the phone to Fax.)

Office Hours:

In addition to the time we have together in class, you may schedule individual or group appointments with Dr. Acker-Hocevar. These appointments can be in-person or on the telephone, since a number of you live a distance away.

Summer office hours for Dr. Acker-Hocevar are Thursdays from 10-4.

Times can also be arranged before or after class as needed. You can email or call me to set up a time for us to meet at any time you need to do so.

Communicating With the Professor:
Email is the most effective way for you to reach me as we usually check email frequently each day and evening.

University Mailing Address:
Michele Acker-Hocevar, Educational Leadership
College of Education
ED Bldg. 242
Florida Atlantic University
777 Glades Road
Boca Raton, Florida 33431-0991

Home Mailing Address:
Michele Acker-Hocevar
6706D Boca Pines Trail
Boca Raton, FL 33433

Who Should Enroll in this Class?
This class is for Ed.D. students. Only students so advised by their doctoral advisors and/or Dr. Townsend, Dr. Acker-Hocevar, or Dr. Floyd may take this class. Any exceptions must be addressed with the program chair of Educational Leadership. This class requires serious work and commitment. You are asked to use the learnings from previous classes, your personal experiences, and what you observe in the field from your Action Learning design and project to prepare recommendations to the client.

Suggested Reference Texts:
There is no one suggested text for this course but there are a number of suggested texts and assigned research, readings and handouts:


Readings:
Additional readings will be assigned by the professor or Set members and library research will be expected to for each class meeting, including accessing materials on electronic web sites. (see Blackboard site.)

Use for all writing and references:

Class Attendance Policy:
Students are required to attend all classes in their entirety. Because your active and well-informed participation is an essential element for mutual learning to occur within your Set’s engagement and the class learning as a whole, it is unlikely that an “S” will be awarded for the course if you miss more than two class sessions. Recognizing that you have many demands and responsibilities, and that emergencies do happen, we can privately discuss the consequences of unexpected events. Each situation will be unique and treated so.

If a class is going to be missed, the professor must be contacted ahead of time, and arrangements made with your Set members. Failure to do so will result in a lower grade, incomplete or a failing grade.

Any absence will result in additional assignment of reporting on two recently published articles on action learning or team learning (or another assigned topic), and duplicating the articles for the entire class. (You will be expected to use the scholarly journals appropriate for a doctoral level course.) A professional 15 to 25 minute presentation, relating the findings or conclusions of the articles, and your key learnings will be expected on your return. More than two absences during the summer term (this includes Set meetings) will require a conference with the professor to discuss your dropping the course. There is no way for you to pass this course.

Course Overview:
In broad terms, the course overview focuses on the primary purpose of this course, which is to apply and integrate a wide-range of knowledge (learning from other courses and experiences) to a learning-in-action model, and then to deliver the highest caliber product to the client/sponsor group so that the client implements your recommendations.

The second purpose of this course, and equally important, is to reflect on your theories on action as you participate in group and class discussions. This means that you will both participate in your project team’s work to help identify and pose problems, identify, share, and analyze data, and develop the final product, but you will also seek to stand back and develop an increased self-awareness of the biases and assumptions, which underlie your actions, as well as those of others.
The third purpose of this course is for students to engage in leadership skill building. This means you will be expected to assume the role of the team leader at appropriate times, contributing fully to what is achieved, and also playing the role of the process coach. In other words, leaders know how to assume many roles to assist the work of the team. Since you will be working in your Sets together to solve real-life problems described and presented by the client/sponsor organizations, each Set will be responsible for:

a) Designing and asking questions of the client to clarify the problem or issue presented, as well as a plan for the first client meeting,
b) Preparing a Memorandum of Understanding (MOU) detailing the questions to be answered, the work plan, what the set will need access to in order to complete the work with their client, the deliverables your set will produce, [the roles you will play as an action learning team throughout the process (these will vary and you will discuss these in your set)], and a timeline for completion,
c) Establishing a team work plan to disburse the collection, analysis, and writing up of the report, highlighting how the data (information) gathered and the findings support the recommendations your Set will present to the client,
d) Preparing a PowerPoint presentation for the client,
e) Practicing the presentation and presenting your work in a dress rehearsal, and
f) Completing a 50-page report to be distributed to the client group, which includes data collection instruments and summaries of data gathered (see assignments later in the syllabus for a more detailed description).

Rationale for Course:

Action Learning focuses on making connections to the broader systems perspective in which an issue or a problem is imbedded. In order for new understandings to occur surrounding an issue, it is central that the Set focuses on reflections in action and on action. This presents challenges for educators to develop the needed skills to solve organizational problems, learn collectively, and enhance organizational learning. It holds appeal to educators trying to build communities of learners that focus on both action and reflection simultaneously.

In view of the fact that adults tend to learn from each other in dialogue and reflection on real life problems and actions taken, this class should evoke questions regarding the assumptions upon which actions are based. The Set is the environment for your learning and will require not only questioning the assumptions of the client, while clarifying your specific Set issue or problem, but also the assumptions of one another as you work collectively to address the issue or problem. Because many of you have worked in groups before and with each other, you are going to have to do two things. First, you will have to step back from of your day-to-day relationships with each other and re-establish new boundaries that allow you the space to develop more self-awareness of your performance and that of others, and in addition, you will be asked to raise questions about each Set member’s assumptions, the client’s, as well as your own.

Course Objectives While Completing the Course:
During the course students should be able to:

1. Develop greater self-awareness.

2. Practice inquiry.

3. Gain knowledge of empathy for others by practicing adult learning principles.

4. Improve critical insight and reflection practices.

5. Integrate learning and doing into real-time experiences.

6. Become skilled at conflict resolution as a source of learning that disturbs personal and organizational systems of thought and challenges out-dated ideas and practices.

7. Set personal learning goals through input from others.

8. Contribute to their Set’s learning in an equitable manner.

9. Utilize their strengths in the Set work on the project.

**The Objectives Will Be Achieved Through:**

1. Keeping an on-line journal of your reflections throughout the class.

2. Probing assumptions on practices in-action and on-action with your peers and the client.

3. Documenting your personal growth and development.

4. Copying the Memorandum of Understanding and critiquing it.

5. Completing the Action Learning Project under real time pressures and limits.

6. Discussing conflicts in a mature and adult fashion, being clear as to what you think the behavior is that is upsetting you, how you feel about it, and what conclusions you have drawn about your feelings and thoughts, so as to check out these perceptions with another individual or members in your Set.

7. Demonstrating the ability to incorporate a peer coach’s, facilitator’s, and client’s suggestions into your personal learning goals.

8. Evaluating your contributions to the Set.
9. Evaluating other member’s contributions to the Set.

**Course Objectives Upon Completion:**

Upon *completion* of the course students should be able to:

1. Apply Action Learning principles in their work setting.

2. Identify and describe areas of personal growth gained during the Action Learning cycle as a result of reflection-in-action, reflection-on-action, peer learning, peer coaching, and facilitation.

3. Become more comfortable in critiquing both personal and organizational assumptions, actions taken, and their effects on “intended” versus “actual” outcomes.

4. Have a greater understanding of organizational problems that connect to a broader systems perspective and how to foster a learning community.

**Teaching Methods:**

My role in this class is that of facilitator and coach. There will be many times when I have to reframe discussions with questions and stand back and apart from your Set’s work. This may cause some frustrations for you because there will be moments when I have to let the Set struggle to come to terms with issues, rather than offer solutions.

The course will incorporate Set work, role-playing, fishbowls, videos, personal questionnaires, surveys, guest speakers, and other teaching and learning methods as appropriate. Sometimes, I won’t know what method I might use until it seems the right time and place to incorporate. My role will assume a non-intrusive one in your Set’s work as it meets to discuss issues. I believe my presence can influence group behavior and I will only become part of a Set’s interaction if invited.

**Course Assignments and Grading:**

There are four assignments that will cover the breadth of the course, which are:

1. Report to the client, (50%)
2. Final presentation to the client, (20%)
3. Final Essay (15%)
4. On-line reflections documenting each class meeting and times the Set meets (15%) — **Due each week.**
5. Attendance (See attendance policy on page 2 of this syllabus.)

**Assignment Breakdown:**

1. Report to the Client/Sponsor- is a collection of your findings, about 50 pages in length. The report should include an **executive summary page** and begin with a
definition of the problem, your investigation, and conclude with your recommendation(s),
a plan of action and a means to evaluate the actions taken. Protocols and raw data should
be included in the appendices. A more complete description of what should be included is
provided later in the syllabus.

2. The presentation to the client should allow for a 45-minute group report, and a 30-
minute discussion with the client after the report is presented. The client will be asked to
recommend a final team grade for the Set effort to the professor, although the final
judgment rests with the professor, based on all the work required for the class. All
members of the Set receive the same grade for the report and presentation, which
constitutes 70% of your grade; unless it is determined that one of the Set members did not
contribute to the project goals and outcomes. The report and the presentation are not
academic, but instead as good as anything a professional consulting firm would produce.
This means that it is important to avoid jargon and to be clear in your writing and
presentation of data and findings. The presentation should limit the number of slides and
only present the necessary information.

3. An essay, 15 to 20 pages in length, should describe peer coaching with members
of your team, the effects of peer coaching on your individual and personal growth plan,
the group dynamics throughout the process, and team learnings. Further, the essay should
discuss the action learning process itself, what the group was able to accomplish, the
relationship with the client, the decision-making process, strategies used to overcome
group conflict, all of which includes both individual and team assessment norms, as well
as forms created by your group for assessment purposes, along with the development of
the product and/or recommendations.

4. On-line reflections address key learnings and how you will apply them in the
future, questions, times you were most engaged, most distanced, most puzzled, and what
learning goals you have established for yourself and in your sets. (Drop in the assignment
box in Blackboard), with the date of the reflections.

5. Attendance will be considered, along with your coming to class on time. (See
discussion of attendance earlier.)

Confidentiality and Openness:
Due to the sensitive nature of this class, it is critical that the information shared
with you by your client/sponsor be viewed as privileged information and thus
confidential. Additionally, everyone needs to feel they have the freedom to communicate
openly. That will occur only if there is an atmosphere of mutual trust. Set members need
to feel free to be open with other Set members. The class culture should be one that
promotes learning and risk-taking.

Meeting the Client:
You will need to arrange to take some time off at your work setting to meet with
the client and to present your findings.
Policy on Academic Misconduct

This class will follow the procedures for academic misconduct set by Florida Atlantic University. Substantive and procedural due process will be afforded students charged with violations of cheating, plagiarism, fabrication, and misrepresentation. See the graduate catalog for details and consequences. See the APA manual for an informational discussion of plagiarism and how to recognize it. Plagiarism involves borrowing someone else's words and writing them up as your own. Plagiarism is unethical, wrong, and will not be tolerated. Because it can be quite confusing to make decisions about how and when to quote and how much paraphrasing is necessary, please consult the APA guidelines to determine what is best.

Statement on Equal Treatment and Policy on Americans with Disability Act:

The professor and students will act with integrity and engage in equitable and respectful verbal and nonverbal behavior with regard to differences of any kind, including age, gender, race, disability, or religion.

It is the policy of the College of Education to make reasonable accommodations for qualified individuals with disabilities. If you are a person with a disability and desire accommodations to complete course requirements, please notify the course instructor in writing as soon as possible to discuss your request. Usually, a letter from the FAU Student Disability Services Office accompanies this request. Additional resource information is available through the College of Education Graduate Student Handbook.

Review of the Broad Framework for the Course:

- Client (single point of accountability),
- Strategic mandate (strategic imperative translated into action learning project)--Participants, usually in teams, are briefed on an issue and asked to produce recommendations that address a problem or an opportunity related to the imperative. Everything in the action learning process is meant to help participants come up with recommendations.
- Learning process (reflection-on-action and reflection-in-action),
- Forming learning teams/sets,
- Forming hybrid groups (these groups are comprised of members from other sets to ask questions and engage in critical reviews,
- Peer coaching in learning teams,
- Orientation to the issue,
- Data Gathering,
- Data Analysis,
- Draft Presentation,
- Presentation, and
- Final Reflection.

Action Learning

COURSE ASSIGNMENTS & ACTIVITIES
EDA 6925-10803

Session 1: May 13, 2006

Professor Tasks: (1) Bring handouts/articles to be read in class. (2) Bring syllabi. (3) Bring Student Info Sheets. (4) Bring copies of past projects. (5) Contact speakers.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Overview; Course Design; Syllabi; Action Learning</th>
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<tbody>
<tr>
<td>May 13, 2006</td>
<td>Before Class</td>
<td>Register!</td>
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<td>Secure Owl Card</td>
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<td>Make sure you have a copy of the APA 5th Edition</td>
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<td>May 13th</td>
<td>During Class</td>
<td>Role of Instructor in class</td>
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<td>Breaks and lunch time/Discuss Snacks</td>
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<td>Student Introductions</td>
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<td>Get copies of student email addresses and share copies</td>
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<td>Jumping into how to ask questions</td>
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<td>Action Learning Syllabus: Discussion</td>
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<td>Thrash out Assumptions of Action Learning</td>
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<td>Private Reflection on Personal and Professional Goals for the Class</td>
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<td>Jig-Saw on Readings to Get an Overview of Action Learning and/or Literature</td>
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<td>Reviews and report out and discuss</td>
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<td>Difference between applied and basic research: A Discussion</td>
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<td>Discuss changing assumptions about life in organizations today and how the unpredictability of events requires a different kind/type of leadership than in the past</td>
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<td>Work in Hybrid Sets to discuss initial Set norming and storming</td>
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<td>The problems and their contexts: Getting started</td>
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<td>Two-minute writing: What do you know about Action Learning now? What significant learning did you have in class today? What concerns do you have?</td>
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<td>After Class</td>
<td>Week of May 13-20</td>
<td>Make sure you secure an Owl Card so you can do research from home.</td>
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<td>(1) Begin to work on your literature review of Action Learning that will consist of working in hybrid sets and will result in a group paper by Week 3 that has at least 15 sources and is a minimum of 15 pages, (2) Begin your reflections—must be typed and emailed to me before the next class, (3) Bring to class an article on Action Learning that you have found and are prepared to discuss (4) Prepare a brief presentation (15 minutes in your hybrid sets) about what you know about learning organizations. (5) Begin working on a brief resume to be given to your client to bring to class next time we meet. (6) Begin thinking about questions to client.</td>
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Session 2: May 20, 2006

Professor Tasks: (1) Copy and bring handouts. (2) Bring syllabi addendums, if any. (3) Bring "Learning Combination Inventory" for each student. (4) Contact speakers for the class. (5) Bring model of MOU for distribution to each set.

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<tr>
<th>Date</th>
<th>Topic</th>
<th>Overview for the day: Action Learning</th>
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<td>May 20, 2006</td>
<td>Before Class</td>
<td>(1) Look up and print out one article on action learning and bring to class, (2) Send your reflection from week one to the drop box on Blackboard. (3) &quot;Read articles on action learning, books, and begin to build a conceptual model of your understanding of action learning. (4) Prepare a brief presentation (30 minutes in your hybrid sets) about what you know about learning organizations.</td>
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<td>During Class</td>
<td>Overview for the Day</td>
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<td>Action Learning Syllabus: Additions and Corrections</td>
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<td>Ensure you sent your first reflections to Blackboard</td>
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Students pass out articles to other students
Learning styles inventory
Make presentations on Learning Organizations
Students share learnings from articles: What are the implications for how we work in Sets?
Students work in Sets to begin to think about how to finalize the paper that is due next week on action learning.

Speakers: What was the process like? The first meeting with the client? How did you prepare for that meeting? What do you need to know about how to be prepared for the meeting? How should the sets think about the MOU’s? How did your set go about completing the work of the project? What was your final product? Knowing what you now know, how might you have thought about action learning differently? What else would you like the class to know? How did you gather information on the problem? What other things did you learn in the process?

AL PowerPoint and discussion on double loop learning and peer-based action learning process.

Learning Style Exercise
Assign discussants for different topics related to action learning: organizational coaching, facilitative leadership, reflective practice, network theory. Divide into groups to share what you already know about these areas and decide how best to work to gain more knowledge. What questions should you ask? How can you examine the assumptions that underpin what you are studying?. What do you now know about these areas?
Identify sets and work in sets to begin to establish norms of practice.
Solidify questions for the client.

Hybrid Probing/Role Play for Meeting with the Client—Cases to explore.
Hybrid sets work on sharing and critiquing questions for the clients. What were the similarities in the questions? Differences? What could groups have done better?

Scenario for MOU and Role Playing to complete MOU for next class: Asking questions.
Two-minute writing: What I learned in class today.

| After Class Week of May 20 | (1) Continue your reflections—must be typed and emailed to Blackboard, (2) "Read areas that were assigned to discuss in class next week and make a small presentation. (3) Prepare a sample MOU based on a scenario in class by you. (4) Prepare questions for client meeting. (5) Bring in the final paper that is the literature review of Action Learning and displays your conceptual understanding (Hybrid Set). |

Meet the Client sometime during the next 2 weeks to finalizing your MOU before the class scheduled class of June 3rd. Sets will also have their MOU’s signed by the clients before the June 3rd meeting.

Sets have also begun to design their action plan process for completing the work of the project—their work plan. This is the time when you need to parcel out the work to set members. You should have a clear understanding of what data each person will collect and from whom, and what the role of each Set member will be in completing the project. Your Set must both address internall accountability processes.

Session 3: May 27, 2006

Professor Tasks: (1) Review Abilene Paradox video and prepare presentation on research on groups. (2) Contact Speakers for Class. (3) Bring in evaluation forms for class to see. (4) Discuss data gathering techniques.
May 27, 2006
Before Class

1) Continue your reflections—must be typed, (2) "Read areas that were assigned to you, (3) Bring Final MOU if completed, (4) Bring Action Plan for work if completed. (5) Bring final Hybrid Set paper that is a literature review of action learning.

Session 3: May 27, 2006 continued

During Class

Overview for the Day
Review from last week—Where are we now?
Action Learning Syllabus: Additions

- Email Reflections
- Comments on Reflections

1. Work in dyads to share the key points from your learning about the action learning process. Come to agreement so you can report out to the group the highlights from your work.

2. Now, break into two groups and share highlights from readings. Decide which of the points are the most important for you to pay attention to in this process. How will you incorporate the learnings? Select a spokesperson for the entire group and a recorder. Be prepared to report out your findings.

3. Come back as a large group and report out your findings. Where is there consensus about the major points? Differences?

Abilene Paradox Discussion and Implications for Group Work

Hybrid sets critique the MOU’s
4. Action Plans for the work.
Set Evaluation Forms

Two-minute writing: What I learned in class today. Turn in with name and date.

After Class Week of May 29-June 2

(1) Continue your reflections—must be typed, (2) "Read Marquardt chapters 10-14, pp.169-243, (3) Finalize work and project work. (4) Assess group effectiveness with client and reflect on the meeting, (5) Make sure that we are getting copies of all your Set communications on email, (7) Send us the draft of the MOU before it goes to the client.

Fourth Meeting, June 2nd

Session 4: Week of June 2nd 2006

Professor Tasks: (1) Bring Team video. (2) Share themes from the reflections. (3) Discuss roles people can take in the groups and how to avoid stereotypes. (3) Bring benchmarking materials. (4) Pass out the Guidelines for the Executive Summary, the Presentation, and the Final Report. (5) Bring copies of clear data tables, figures, etc. (6) Have the class practice writing up the findings for a table and present these along with conclusions, and possible recommendations (find example). (7) Discuss issues of reliability and validity, trustworthiness and confidence.

Week of June 2nd, 2006
Before Class

Overview for the day: Action Learning
1) Continue your reflection—must be typed, (2) Bring data gathering instruments to class, (3) Bring group norms to class for your set to review, (4) Be prepared to share the questions about your work thus far, (5) What could your group be doing differently, and (6) What are you learning from your set notes? (6) Examine validity and reliability issues that relate to qualitative measures and quantitative measures. How does the client know that your findings can be believed?
During Class

**Overview for the Day**

*Review from last week—Where are we now?*

- Make sure you are emailing your Reflections
- Comments on Reflections

**Team Video**

Effective and ineffective group discussion on how this relates to the work of the Sets?

Discussion questions of action learning process coaches….what have you learned?

**Benchmarking**

Developing your own set evaluation rubrics.

Reviewing the set action plans for the projects.

Two-minute writing: What I learned in class today. Turn in with name and date.

Review of the goals and objectives for the course.

Understanding the Executive Summary, the Presentation, and the Final Report.

**Presentation of Data—examples.**

Let students work in their sets to work through the overheads and presentation process? (What do you now know about the reliability and validity issues? Need to know? Still need to know?)

What is the difference between limitations to your work? Delimitations? What is your group plan?

After Class

**Week of June 5-July 14**

1) Continue your reflections—must be typed,
2) Review ways to present data and plan presentation to class,
3) Work on Set project* conduct literature review around the problem, design data collection instruments, plan meetings and deadlines, assign key responsibilities and have draft of project on the 15th.

**Week of July 15th 2006**

**Date** | **Topic** | **Overview for the day: Action Learning**
---|---|---
Week of July 15th, 2006 Before Class | 1) Continue your reflections—must be typed, (2) Bring draft of final project to class, (3) Bring your the Rubrics your set designed for evaluating their effectiveness and discuss, and (4) Reflect on the process with your client and relate what you could have done differently.

**Week of July 15th 2006** During Class | **Overview for the Day**

*Review—Where are we now?*

- Comments on Reflections

Discussion of each Set’s projects and work to be completed.

Two-minute writing: What I learned in class today. Turn in with name and date.

Work on class rubric for feedback to the different groups…How will you give feedback?

**Week of July 15th 2006** After Class Week of July 15th | (1) Continue your reflections—must be typed, (2) Prepare your final presentations for dress rehearsal to the class, (3) Who will deliver the findings? (4) What visuals will you use?

**Session 6: Week of July 29th 2006: Dress Rehearsal**

**Session 7: Week of August 5th 2006: Debriefing**

**Other Meeting Dates but in Your Sets:**

- Week of June 10, work in sets
- Week of June 17, work in sets
- Week of June 24, work in sets
Week of July 1, work in sets
Week of July 8, work in sets

*Progress Check: Evening Meeting To Be Scheduled with each Set*

Week of July 15-28: Finalize report and presentation. Sets will email reports and presentation to Dr. Acker-Hocevar.

Dress Rehearsal: July 17-26. Dates and times to be determined by each Set.

Presentation to the client: July 27-August 4th.
Guidelines for the Executive Summary, Final Presentation, and Final Report

A. Executive Summary
The Executive Summary should contain, at a minimum, the following:
(a) Purpose,
(b) Issue or questions examined,
(c) Mode of inquiry, such as: interviews, document analysis, surveys, participant observation etc., (In other words, what were the processes your set used to investigate the issue, gather, and analyze data to arrive at the findings?)
(d) Major findings,
(e) Conclusions, and
(f) Recommendations.

Final Thoughts:
The Executive Summary should be no longer than two pages, preferably one. The bulk of the information should address the findings, conclusions, and recommendations. Make sure that your recommendations address the question(s) posed by the client, your findings are linked to data sources; your conclusions are based on the findings; and your recommendations are feasible, usable, and reflect some innovative thinking on the part of your set.

Remember, the beauty of Action Learning is using your knowledge--and through the work of the set, questions can be raised, assumptions can be challenged, and insights can be gleaned, seeing things from a new perspective to offer unique but usable recommendations.

B. Presentation
Guidelines--Limit slides--some of your slides can be combined. You can also use charts, transparencies, or other graphic organizers to present your data and findings; this is a decision for your group.

Basic elements to address in your report to the client:
1. Purpose
2. Questions
3. Data Sources
4. Findings – This is where you may want to combine techniques.
5. Conclusions
6. Recommendations

C. Final Report to the Client
The final report should follow this format, but can be modified to fit your issue.
1. Introductions and Background
   a) Larger Context of the Problem (Use Literature Review to couch the problem in the body of literature that addresses the issue e.g. college attrition is related to enrollment management, student readiness, professors’ teaching and advising, fiscal concerns etc.,)
   b) Local Context of the Problem—What is the specific context of the problem locally? What has been done to the address the issue in the past?
   c) Problem Statement—What is the problem your set is addressing? You might want to relate the problem back to the larger context and the local context if this makes sense.

2. Purpose (of your set in this Action Learning Project) The purpose is to examine the----

3. Project Objectives (Go to your contracts and extrapolate.)

4. Limitations (Limitations address the methods you are employing, the sample of respondents, etc.) For example, a limitation of the survey approach is that respondents only address the issues on the survey. There may be other issues that are important that are not addressed.

5. Delimitations

6. Method or Sources of Inquiry
   a) Describe how your set addressed the issue? What is the overall design your set used to do its work? [You may want to insert your work plan in the appendices and then describe your processes in the text.]
      What was your work plan? What methods did you use? (e.g. qualitative and quantitative measures) What were your sources for the inquiry? (e.g. interviews etc.)
   b) What is the setting?
   c) Who did you involve? (e.g. participants and/or sample)
   e) How did you collect data? Be very systematic. In other words, describe how you collected data for each data source.

7. Presentation of Findings
   • Up to this point, the reader should have a very clear picture of what you did, why you did it, so they are very clear about how you arrived at your findings.
   • Present the findings for each data source. Use tables, figures, graphs, etc. Explain the findings for each data source. You are not drawing any conclusions yet.
• Look at the findings across data sources for patterns and trends if applicable.

8. Next, present the conclusions from the findings.
   In other words, what can you say now that you look at the findings? (What does this suggest for the recommendations--should subtlety be implied so that there are no surprises when you get to the recommendations; there is a logical progression.)

9. Lastly, make your recommendations.
   This is the part the client is most interested in and should be your strongest part of the report. You might even want to provide a rationale for the recommendations and a timeline. In other words, everything in the report should build to this point and there should not be any surprises here.

To recap, your final report should be jargon free; it should be very readable and user friendly. This is a report that should flow. You are simultaneously telling a story with your data and documenting a process used to draw conclusions and make recommendations.
NAME (print): ________________________________________________________________

Email: ___________________________________________________________________

My personal goals for this course include:

1. ___________________________________________________________________

2. ___________________________________________________________________

3. ___________________________________________________________________

My professional goals for this course include:

1. ___________________________________________________________________

2. ___________________________________________________________________

3. ___________________________________________________________________
Some Books About Personal/Professional Coaching and Action Learning

Books About Coaching
Start with:
"Handbook of Coaching" by Frederic M. Hudson -- One of the few books on coaching that provides a wide overview of the roots and foundations of coaching, various types of coaching, vast bibliographies about coaching in a variety of settings. Includes guidelines for coaching in variety of settings. Jossey-Bass Publishers, 1999

Also consider:
"Masterful Coaching" by Hargrove. Purportedly one of the best books on coaching. Combines "being" coaching with "performance" coaching. Hudson is one of the founders of the Fielding Institute, and is founder of Hudson Institute. Pfeiffer, 1995.


"Coaching: Evoking Excellence in Others" by Flaherty. One of the best books for performance coaching. Flaherty is the founder (or a principal) in New Ventures West, another major coaching school. Butterworth, Heinemann, 1999.

Books About Action Learning
Start with:

Action Learning in Action : Transforming Problems and People for World-Class Organizational Learning by Marquardt. Another basic overview, includes much focus on management and organization development. 1999. (NOTE: This book highlights the Leaders Circles.)

The ABC of Action Learning by Reginald Revans (from the Mike Pedlar Library). This is THE book to get by the founder of action learning. Was out of dated, and now is re-released. 1998.

The Management Assistance Program for Nonprofits
2233 University Avenue West, Suite 360
St. Paul, Minnesota 55114 (651) 647-1216
[MAP Home Page] [Library Home Page]
References: (We listed first names.) The Gall Book is a good reference to have too.


* There is probably a more recent edition.


Rubric for the Presentation: Scoring Mechanism

1= Sufficient Evidence
2=Insufficient Evidence
3=No Evidence

Comments:________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

1. Presentation and Delivery

(a) Opening---1----2----3
(b) Flow and/or Sequence---1----2----3
(c) Eye Contact---1----2----3
(d) Tone---1----2----3
(e) Level of Enthusiasm---1----2----3
(f) Clarity of Presentation---1----2----3
(g) Projection---1----2----3
(h) Use of Visuals---1----2----3
(i) Closure---1----2----3

Comments:________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. Content

(a) Knowledge of Topic---1----2----3
(b) Comprehensible Data---1----2----3
(c) Understandable Conclusions---1----2----3
(d) Concise Information---1----2----3
(e) Relevant Information---1----2----3
(f) Clear Conclusions---1----2----3
(g) Logical Recommendations---1----2----3
(h) Breakthrough Recommendations---1----2----3

Comments:________________________________________________________
________________________________________________________________________

3. Professionalism---1----2----3

Comments:________________________________________________________
________________________________________________________________________

________________________________________________________________________
4. Appearance---1----2----3
   Comments:_________________________________________________
   ___________________________________________________________
   ___________________________________________________________
   ___________________________________________________________

5. Satisfy the Outcomes of the MOU---1----2----3
   Comments:_________________________________________________
   ___________________________________________________________
   ___________________________________________________________
   ___________________________________________________________