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# Teaching Leaders

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## **Teaching Leaders**

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### **Introduction**

In an age of instantaneous information sharing and increased interdependence, today's leaders must learn to work collaboratively, leveraging the strengths, skills, and experiences of those around them, in order to address the challenges they face. The Center for Collaborative Leadership is uniquely situated in the College of Management at the University of Massachusetts Boston. The purpose of the Center's Emerging Leaders Program is to challenge and inspire the adult participants in the program to act collaboratively, identify and rethink boundaries, build purposeful relationships, and become better leaders and citizens. Our experience with nearly 600 participants spans 14 years. We developed a program with a unique curriculum and a specific teaching methodology as we worked with these individuals. In this brief, we reflect on how this program is changing not only the individual leaders but, as importantly, the organizations and communities to which they belong. We offer our insights on lessons learned that may be beneficial to others who teach graduate students and professionals.

In our work with adult learners we focus on the topic of leadership. Most program participants have an undergraduate degree and many have a graduate degree. Identified by their organizations as rising talent, they work with us to enhance their leadership skills. We predict that more education in the future will be addressing adult learners who need to build upon their learning; therefore, our lessons from working with these groups of individuals is important for future educational theory and practice. In addition, the wealth of experiences participants bring to the learning environment is significant and adds much to our teaching or, as we see it, guiding their learning.

### **Literature**

#### **Theory and background**

Bonwell and Eison's (1991) work on active learning has formed the cornerstone of much of what we do. They give numerous examples of how active learning can be incorporated into a curriculum, and they note that "students prefer strategies promoting active learning to traditional lectures" (p. iii). They cite earlier studies, such as Chickering and Gamson (1987), which stresses that students must be actively engaged and not simply listen to lectures for effective learning. Bonwell and Eison also call for cooperative learning where learners increase their social skills in addition to increasing their learning. This happens most significantly within our project teams, which will be discussed shortly.

Other writers on educational theory have also been helpful in shaping the way we look at collaborative learning. Spalding's (2014) analysis of some of the main historical players in adult education, beginning with John Dewey's ideas to make "people open to more learning" (pp. 14–15) and Paulo Freire's stress on student experience align with our approach to engaging the student's in the learning. Faust and Paulson (1998) advocate connecting course material to actual real life situations, a practice we follow both in the classroom as well as in the project team work.

Similar to Spalding, Farrell (2009) places active learning in a historical perspective and outlines teaching strategies that promote active learning. She argues that active learning promotes "deeper" learning. Meyer and Jones (1993) offer helpful suggestions on creating an active learning environment, effective use of case studies, and how to integrate reading materials with guest speakers. Sokoloff and Thornton (2004) focus primarily on active learning techniques in the sciences, but their insights into the value of small group work also have informed our design work, as has Weimer's (2012) outline of the necessary principles of active learning. We incorporate, in particular, the observation that people learn more when they learn with others.

We have drawn upon the research in adult learning to guide the curriculum design. Brookfield (2006) calls for (1) respect among participants, (2) collaboration, and (3) reflection as key parts of adult learning. All these ideas have been essential in our program. In addition, our design encourages our students to become more effective and more civically engaged leaders (Aldrich, 2003; [Redacted] 2014). Prince's (2004) work evaluates active learning effectiveness and outlines several positive benefits of active learning. Purdue University is undertaking a study of the effectiveness of active learning, which will add to our knowledge of how it works best. This is encouraging news and the results will assist us in further refining our model.

Our design also draws upon leadership development literature. The field of leadership studies recognizes that traditional leadership development curricula focus on skill acquisition (Hogan & Warrenfeltz, 2003) neglecting the learning of what it means to be a leader. Ashford and DeRue (2012) articulates this eloquently stating, "the return on investment in leadership development would be much greater if organizations invested in developing individuals' skills related to the learning of leadership from lived experiences, as opposed to simply teaching leadership concepts, frameworks, and skills" (p. 147). In our curriculum, we situate the topic in the framework or theory and then ask the students to work with the concept using real examples. An illustration of this is having the participants bring in current work issues that we then process through the adaptive and inclusive lens, using models from Heifetz (1994).

Our process involves both active learning and reflection. Reflection is necessary in order for individuals to realize their current ways of thinking and being, as well as to contemplate alternatives (Dirkx, Mezirow, & Cranton, 2006; Hogan & Warrenfeltz, 2003; Mezirow, 2000). Mirvis (2008) describes this contemplation as consciousness-raising. And, philosophically we agree with him, particularly his perception in thinking about, "how consciousness-raising experiences can, on a collective scale, help transform the way leaders engage one another and the world around them" (p. 174).

## Application

### Goals

Our program goals are to assist these learners in understanding various leadership models and for them to reflect on their own leadership styles and make changes where needed, to practice collaboration and working in teams, and to become civically engaged. We share these goals with participants as they enter the program and throughout each of the ensuing sessions. Progress on goals is measured through self-reported surveys collected throughout the program, and through a pre- and post-program Leadership Practice Inventory assessment (Kouzes & Posner, 2002).

### Curriculum

The curriculum consists of four components. The first is skill development. During each session the participants work with subject matter experts to understand and begin using relevant leadership skills. Skills covered include: communication (including having difficult conversations), strategy development, navigating change, cultural awareness and inclusiveness, fostering objectivity, conflict resolution, emotional intelligence, appreciative inquiry (a strengths based approach), authentic leadership, and developing trust. Each skill is introduced with its theoretical foundation. This enables the participants to understand the research that supports this approach. The crux of the session time is spent with the participants working with the skill. Methods for applying the skill during the session vary. Some may be done through a case study, examples from the individual participants, or in relation to the project they are assigned to work on in the program. For example, the session on change helps them understand change theory and then apply it to real world situations. They may work in dyads or small groups as they explore relevant change strategies. Since many participants deal with change on a regular basis in their organization, this learning is useful immediately whether they are leading a change effort or participating in one.

Second, participants hear from current leaders in the region from the corporate, nonprofit and governmental sectors. These leaders draw on their own leadership experiences to offer candid insights into the reality of leadership, and the learning the leaders have evidenced about themselves along the way. This experience helps the learners understand that leadership is not “one size fits all.” Various leadership models exist and leaders draw upon the various models depending on the situation they face.

For example, the CEO of Blue Cross Blue Shield of Massachusetts or Mass Eye and Ear may share the impact of health care legislation on their organization, or the participants may learn about the complexities of addressing a social mission from the executive director of The Italian Home for Children or Pine Street Inn (facility for homeless persons). This setting also enables the participants to engage in a dialogue with leaders with whom they might not otherwise have exposure. We encourage the participants to reflect on how these leaders’ stories inform their awareness of themselves as well as to the issues that are being addressed. A senior executive whose organization sends individuals to the program explains the impact this way,

*Our participants in the Emerging Leaders Program always mention the quality and impact of hearing the "leadership journey" from the program's speakers, along with*

*something they have learned and will apply from that interaction. As an employer we value the opportunity for them to meet new colleagues from a variety of industries, work on meaningful projects that support our community, and experience other leadership styles - all with the expectation that they will use these interactions as part of their on-going career development.”* Kenneth C. Montgomery, First Vice President and Chief Operating Officer, Federal Reserve Bank of Boston

The third component of the program, which makes it unique compared to many other executive education programs, is the extensive civic project team experience. The participants are coalesced into project teams of six to eight individuals. These individuals come from different sectors, industries, areas of expertise, and lived experiences. In these leaderless teams the participants have a safe space to begin practicing the skills they are learning in the classroom. They learn how to appreciate each other’s differences and leverage one another’s strengths while working collaboratively and incorporating various points of view in their suggested recommendations for dealing with a particular issue.

The team projects are not “made up” work. The teams partner with local nonprofits, government agencies, or associations to tackle significant regional issues. At the end of the nine-month program the teams make recommendations to the project sponsor organization, many of which have been implemented. They then present their findings and recommendations (our form of examination) to concerned citizens in our community, including the sponsors. One of the more interesting recommendations, concerning how to keep young professionals in the region, has been incorporated into programs for the local Chamber of Commerce and the Federal Reserve branch. Most recently over 100 citizens attended to hear the result of their endeavors in 2015.

The fourth, and final, component of the curriculum is self-discovery. Both explicitly and implicitly, we help the participants understand who they are, and who they are becoming, as a leader. They discover areas in their own styles where some changes can be made and they also learn how better to emphasize their strengths.

This excerpt from *Next Generation Leadership: Insights from Emerging Leaders* (Penney & Neilson, 2010) illustrates the impetus for embedding self-reflection into the program.

*To reflect on what went wrong and could be improved is a valuable exercise, but one that should not be used only in a crisis situation. Many young professionals with strong leadership potential do not devote sufficient time to reflection to evaluate their strengths and shortcomings. So the importance and benefits of reflection need to be stressed early. We encourage reflection in several ways: self-knowledge/awareness, writing essays on leadership and articulating and determining purpose and developing goals that align with that purpose (p. 18).*

Each of the four components illustrated above demonstrates the focus on **active learning**. We find that participants learn more effectively by “doing,” using hands on learning, working in teams—in groups – and in the project teams, as well as through dialogue. This learning is reinforced and assimilated through the practice of self-reflection.

## **Faculty and speakers**

The director of the program serves as the curriculum architect, a position that both authors have held. The director designs the integrated curriculum over the course of the program (similar to designing the degree requirements) and engages faculty resources in the College of Management, other faculty from the university and other local universities, as well as established consultants. The faculty deliver the skill session in their area of expertise, such as change theory or conflict resolution. In addition, we engage current leaders from the business, nonprofit and governmental sectors to participate in each session. They share their leadership styles, their leadership challenges, and what qualities are needed for the 21<sup>st</sup> century. Because of the small cohort size (we limit the cohort to 50 individuals), the learners are able to engage in a dialogue with these leaders, offering a unique opportunity to pose challenging questions to these current leaders. Over the course of the program, the students will learn from nearly three-dozen professionals, each sharing their expertise and experience with the cohort.

### Students

We are fortunate because our students, once identified by their organization, have chosen to enroll in our leadership learning experience—they want to be there. The richness of their diversity (some of which are evidenced in the tables below) encourages an inclusive learning environment, where many points of view are encouraged.

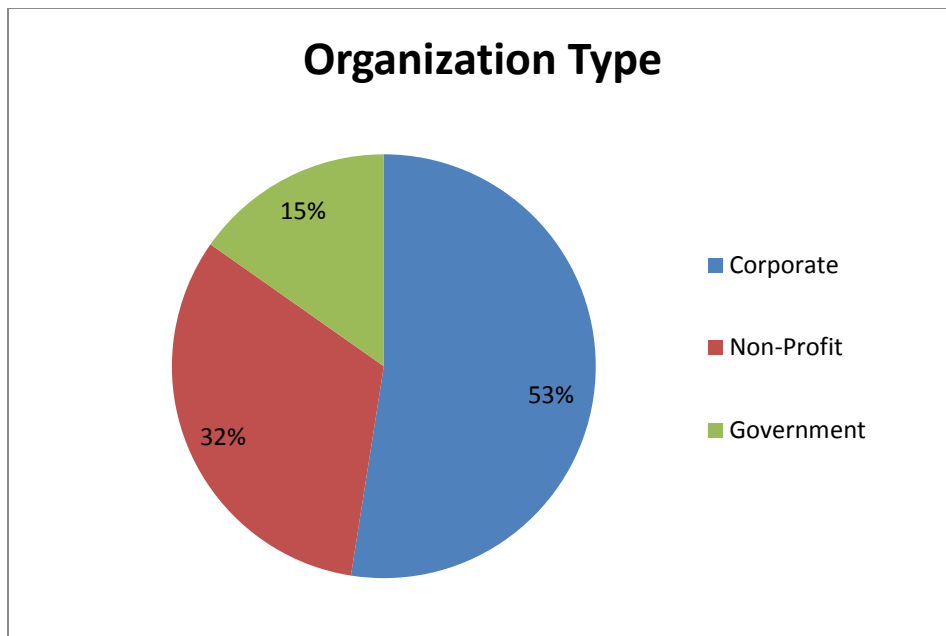


Figure 1. Breakdown of organization type over program history

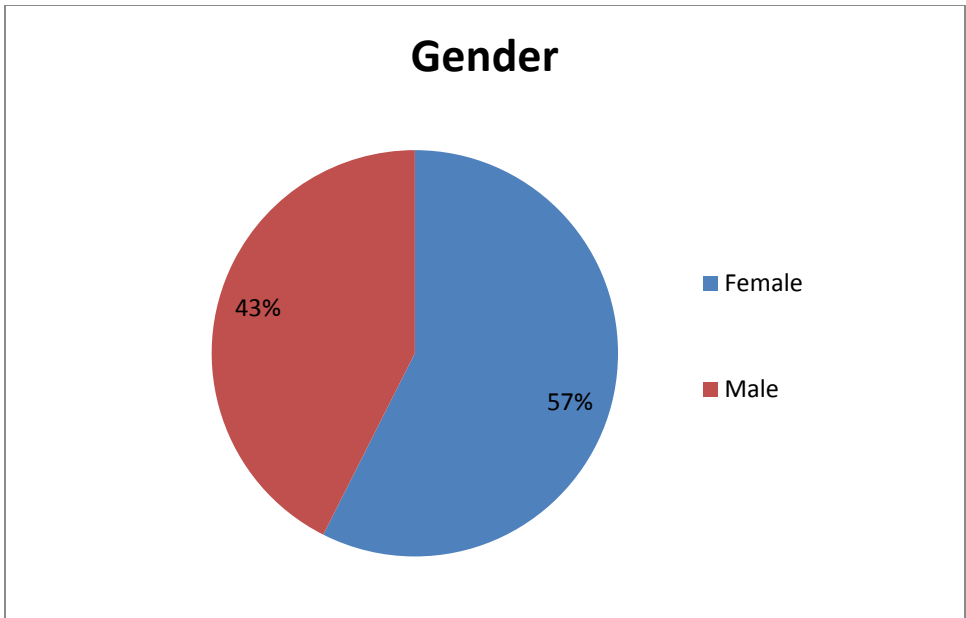


Figure 2. Breakdown of gender over program history

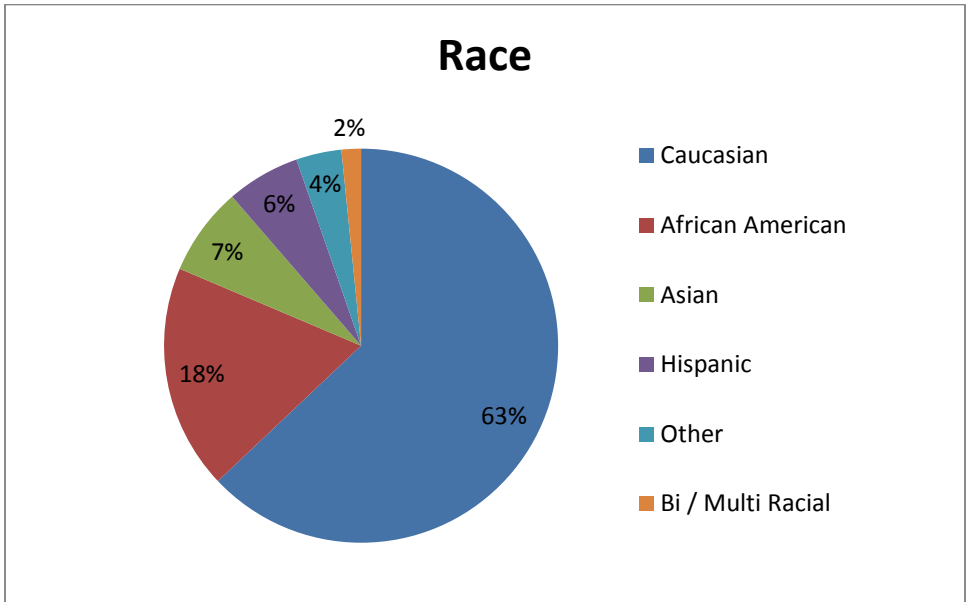


Figure 3. Breakdown of race/ethnicity over program history

**Readings** are suggested to the participants for each session. These act as a durable resource as the participants continue to embed the skills into their repertoire. Faculty share the theory that supports the topic they are teaching, but the crux of the skills sessions are spent with the participants, either individually or collectively, working to apply the skill.

The **leadership settings** vary with each session and are also diverse. Some are on our university campus, but others are in regional businesses, governmental agencies or nonprofit

headquarters. This change in the learning environment in itself helps to provide a significant learning experience. The participants learn first hand how various organizations work, what issues they face and what kinds of leadership works best in each particular situation. Frequently, they meet with the CEO, or other leader at the organization, and also tour the facility to learn more about its functioning whether it be biotech, financial services or the company that distributes energy to our homes and businesses.

## Reflections

We find through our experience that learning cannot be internalized in a single session. Therefore the program has been structured to begin with a weeklong leadership immersion session that runs from 9 am to 5 pm each day, followed by monthly day-long sessions. This format allows the participants to re-engage in the program and immerse themselves in the content. The project then gives them the opportunity to practice the skills they have learned in the classroom.

As noted above, we find that participants learn more effectively by “doing,” using hands on learning and that they learn well in groups. One example from this past year was the work done with a local nonprofit, Cradles to Crayons ([www.cradlestocrayons.org](http://www.cradlestocrayons.org)). This project team was comprised of individuals from healthcare, media, banking, insurance, and a nonprofit focused on land use. An excerpt from the original request of the project team was, “As we look ahead and consider expansion within Massachusetts, Cradles to Crayons needs to understand which locations in other regions of our state offer the most strategic options for us to create a satellite presence.” The team was able to create and test a model for Cradles to Crayons to apply when evaluating future expansion opportunities. The quotes below offer insights from the perspective of the project sponsor, the program participant, and the participant’s organization.

*There are many ways to approach growth and as an organization that makes key decisions based on data, the choice to engage the UMass ELP Team was smart for us. Every choice has consequences so the decision meant that we were choosing to slow down, even scale back before we had the best tools to support our growth strategy to move forward. Because the team came from different sectors and industries, they were able to approach our request with fresh eyes and unique perspectives. In the end, what the Team delivered is a product that has the potential to support growth in perpetuity not only in our market; also and perhaps just as importantly across the organization's network. The team exceeded every expectation and that makes every stakeholder stronger.* **Sharon Reilly, Executive Director, Cradles to Crayons**

*Working with my ELP project team demonstrated to me that I can "lead" and have an impact on a project and my team members even as a non-designated leader or manager. I gained insight in my abilities to impact others in a way that promotes success in a complex project. Diversity of thought promotes creativity. And I learned that the most rewarding achievement comes when there is both inclusiveness and collaboration of team members.* **Catherine Z. Collins, CSSC, Assistant Vice President & Senior Counsel, US Insurance Products, John Hancock**



*The lessons learned and experiences undertaken by Catherine and Nicole are apparent in the confidence they demonstrate when offering new ideas and acting as agents of effective collaboration.* **James D. Gallagher, Executive Vice President, General Counsel and CAO, John Hancock**

A key component of the learning is introspective. Integral to being able to develop as a leader is the need to understand one's strengths and weaknesses. Becoming aware of our 'blind spots,' those things that we cannot see in ourselves but that others can, is crucial. This mirrors Bennis' (as cited in Michelman, 2004) suggestion that self-knowledge is essential, and it includes both what you know and don't know about yourself. The field of emotional intelligence also recognizes the importance of self-reflection. In fact, Goleman (1995) lists self-awareness as the first step in the journey toward emotional intelligence. This learning better enables us to manage ourselves and to place ourselves, as Drucker (2005) advises, where we can make the greatest contribution.

The importance of self-reflection was a recurring theme for alumni of the program as illustrated throughout *Next Generation Leadership: Insights from Emerging Leaders* (Penney & Neilson, 2010). The need, as discussed by Chi Huang, a physician and member of the 2005 cohort, is clear.

*My entrance into leadership in medicine was circuitous and unexpected. As a practicing physician, my desire was and still is to provide the very best care to my patients and their family. And yet there were instances in my practice when systems and operations prevented me from delivering the most efficient and effective care. Motivated by this challenge, I cautiously entered into management and leadership with the same singular desire to care for people, but from a different vantage point. . . . The greatest challenge in my early career in leadership is understanding and managing people. People have different needs and motivations. Paradoxically, I have been challenged to know myself better, my strength and weakness, in order to grow professionally (p. 19).*

Michael Rawan of the 2007 cohort, a banker, provides another interesting perspective. *[Writing the essay] allowed me to reflect on my experiences, the mentoring I have received, the lessons I have learned, and the legacy I have been building. This essay is both a product of my journey as well as a homage to those that have guided and influenced my career (p. 20).*

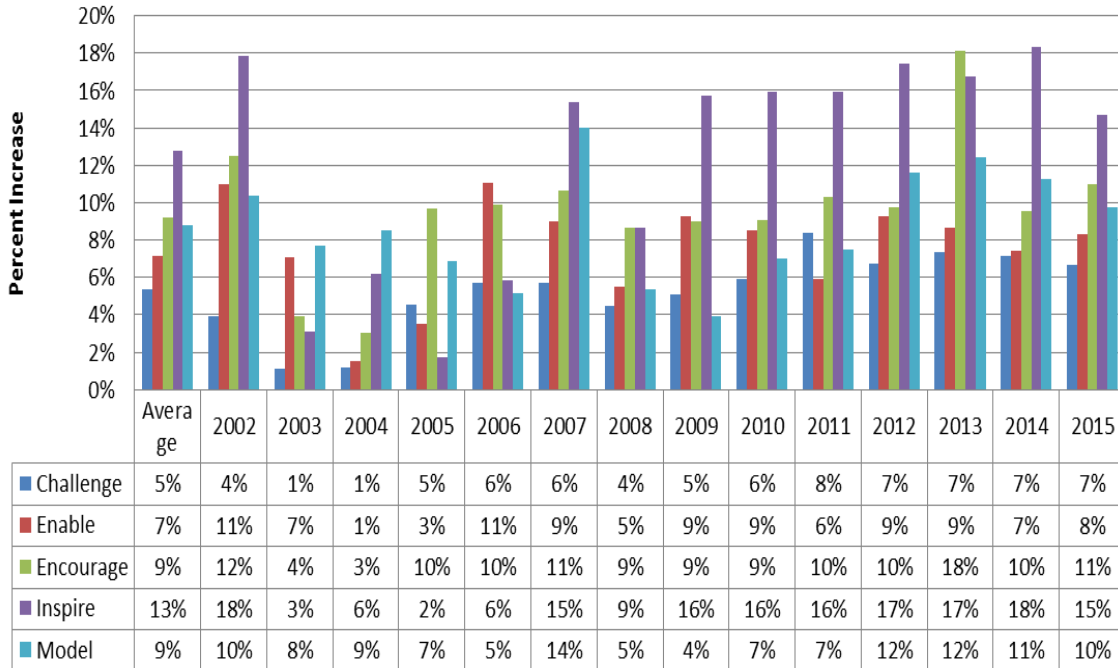
## **Outcomes**

### **Measurement**

We measure the success of our methodology of working with adults in several ways—the team performance mentioned above is one. We also administer the Leadership Practices Inventory (LPI) (Kouzes & Posner, 2002) at the beginning and end of each nine-month session. Results here have been very positive and show improvement in the areas measured with LPI, which also correspond, to what we purport to do in the program.

Table 1. LPI increase for each cohort year

### Increase in skills per Cohort Year



As mentioned previously, we administer the LPI at orientation and again at the end of the program. We use these data points as proxy for learning/development during their time in the program. As the table above illustrates, there appears to be a positive correlation between our program and their perceived confidence in their leadership skills. We have just begun to analyze this data and are encouraged by our initial findings. However, it is our intention to further investigate and target our research to better understand the significance of these perceived improvements.

Another measure is tracking the graduates' career progression after completing our program. Here results are most promising. A few examples may illustrate how the intention of the program is being realized. Several alumni of the program have been appointed to cabinet positions with our newly elected Governor... Another has assumed the interim head of the Boston Public Library... Another has been selected as the acting Executive Director of the Massachusetts Convention Center Authority. The physician quoted above has been made Associate Chief Medical Officer of a major hospital. The list goes on and on, as these emerging leaders are constantly moving into advanced positions of leadership in their organizations and their community.

### Recommendations

We have shared our experience running a nine-month, experiential leadership development program. For those endeavoring to do the same, or something similar, we offer our

insights.

First, crystallize your purpose. Our mission is to inspire and challenge individuals to: act collaboratively, identify and rethink boundaries, build purposeful relationships, and be a more effective leader and citizen. The clarity of this purpose is infused in every element of our program. It informs the maximum size of the cohort and the diversity of those selected to participate. It speaks to the importance of the project component of the program as well as the way in which we seed the project teams.

Second, be mindful of your audience. Our program targets rising leaders. These are individuals who have been identified by their organizations as high potential and important to the future of that organization. As noted earlier, most have already received their undergraduate and many their graduate degree. Therefore, our program focuses on the skills (both hard and soft) that are needed by leaders now and into the future. We regularly vet these skills with both the participants and organizations to verify their relevance.

And, lastly, create the environment to support the learning. In addition to each of our sessions being held at a different location, we also have the participants sitting with different groups each time. These are meant to introduce them to new information, points of view, and ways of thinking. At the same time, we are explicit from the outset that this is a safe environment where they can trust one another, and us, as they engage with the learning.

Teaching adults is challenging but also rewarding. The results we have witnessed are positive and may also inform teaching at the graduate level. Adult learners thrive with active learning, they need guidance to reflect, they need to practice teamwork and collaboration. We encourage our participants to be concerned citizens and to become involved in their communities. And as their needs change, our program, too, will change to meet those needs. We guide their learning rather than teach in a more traditional way. We learn from them as they learn from us and the others that facilitate in the program.

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**Sherry Penney** is the former Chancellor of the University of Massachusetts Boston and the Founding Director of the Center for Collaborative Leadership there. Now emerita, she continues to teach courses on leadership at the College of Management at the university and to pursue research in leadership. She can be reached at [sherry.penney@umb.edu](mailto:sherry.penney@umb.edu).