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Consultancy Project Executive Summary

Organization: Gardner-Webb University School of Education

Project Title: DEVELOPMENT OF AN EXPERIENTIAL LEADERSHIP CURRICULUM USING THE ABSORB, DO, CONNECT MODEL

Candidate: Sarah Norris

Consultancy Coach: Dr. Jeff Hamilton

Defense Date: July 1, 2020

Authorized by: Dr. Jeff Hamilton

Approval

This consultancy project was submitted by Sarah Norris under the direction of the persons listed below. It was submitted to Gardner-Webb University School of Education and approved in partial fulfillment of the requirements for the degree of Doctor of Education at Gardner-Webb University.

Dr. Jeff Hamilton, Faculty Advisor
Gardner-Webb University

Date

Dr. Jeff Hamilton, Site Advisor
DEOL Program Coordinator & Assistant Professor

Date

Abstract

DEVELOPMENT OF AN EXPERIENTIAL LEADERSHIP CURRICULUM USING THE ABSORB, DO, CONNECT MODEL. Norris, Sarah, 2020: Consultancy Project, Gardner-Webb University.

Numerous leadership development programs exist in both the educational and workforce sectors. However, many organizations, specifically nonprofit and governmental agencies, do not have access to hands-on leadership development curriculum that fits their needs. Often, they either send new leadership staff to off-site “leadership training” that does not provide a transfer of learning aspect to be practiced and applied on site, or they create “make-shift” leadership training sessions that do not show validated improvements. The purpose of this project was to develop and beta test an experiential learning curriculum for emerging leaders using the Absorb, Do, Connect model (Horton, 2012). The curriculum is generic enough to be used by any organization interested in growing the leadership skills of their staff. Each module of the curriculum includes components of learning (Absorb), experience (Do), and application (Connect) to offer the greatest opportunity for applicability to one’s real life experience as a leader. I was able to develop, beta test, and assess modules of the curriculum in two separate settings. Feedback from participants showed increases in knowledge gained, confidence in using learned skills, and commitment to practicing those skills.

Keywords: experiential learning, leadership training, simulation, hands-on learning, transfer of learning, role play

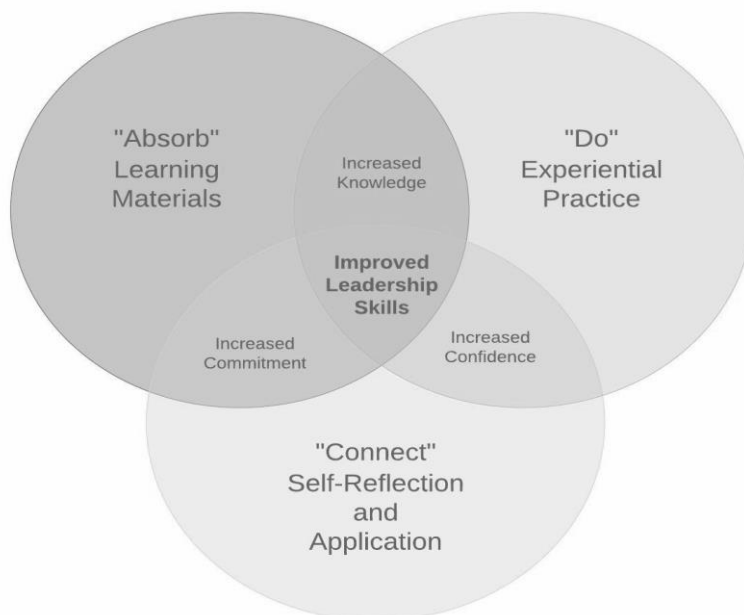
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1 Introduction

1.1 Project Purpose

The purpose of this project was to develop and beta test an experiential learning curriculum for emerging leaders using the Absorb, Do, Connect model (Horton, 2012). I was able to develop, beta test, and assess modules of the curriculum in two separate settings, one for students within the Doctorate of Education in Organizational Leadership (DEOL) program at Gardner-Webb University (GWU) and one with leaders at the Onslow County Department of Social Services (OCDSS). The curriculum is generic enough to be used by any organization interested in growing the leadership skills of their staff. Each module of the curriculum includes components of learning (Absorb), experience (Do), and application (Connect) to offer the greatest opportunity for applicability to one's real life experience as a leader. As participants complete all three aspects of the learning experience, the goal is to increase their knowledge of the leadership topic, their confidence in completing the leadership skill, and their commitment in putting the leadership skill into practice to improve their overall leadership abilities.



Numerous leadership development programs exist in both the educational and workforce sectors. However, many organizations, specifically nonprofit and governmental agencies, do not have access to hands-on leadership development curriculum that fits their needs. Often, they either send new leadership staff to off-site "leadership training" that does not provide a transfer of learning aspect to be practiced and applied on site, or they create "make-shift" leadership training sessions that do not show validated improvements. Because of a lack of resources, planning, priority, or a combination of the three, many leaders within organizations today report a lack of soft skills needed to lead well. This deficiency within leaders can lead to a multitude of

issues within an organization ranging from low morale to high turnover to decreased effectiveness of the organization's mission. In working with two organizations to beta test this curriculum, each site advisor acknowledged the need for a hands-on leadership learning experience for their participants.

This curriculum can offer participating organizations an opportunity to develop and enhance skills of their leadership staff through practical and tangible experiences. While a learning setting cannot account for all experiences a leader may encounter, several targeted modules with experiential and debriefing components along with homework assignments for reflection and practice can give participants a framework on which to build.

1.2 Associated Documents

- Appendix A: Retrospective Pre-Post Assessment. This assessment measures participants' shift in responses of knowledge regarding the learning topic, confidence in using knowledge gained, and commitment to practice using what was learned.
- Appendix B: Feedback Form. The feedback form was used to assess participants' satisfaction with the training session.
- Appendix C: Professional Literature Review (PLR). The PLR gives an overview of current themes regarding experiential learning used to build the framework for the curriculum.

1.3 Project Plan Maintenance

I began this project by working with GWU to provide simulation labs for their Organizational Leadership Lab (OLL) summer sessions. As my project developed, I decided to focus more on developing a Center of Excellence (COE) that could offer leadership training to students as an additional resource outside of coursework. Initially, my consultancy coach and I thought we could use this project to start a COE at GWU; but due to GWU's budgetary constraints, our idea was not possible. From that point, I determined that it made sense to create a curriculum that could be generic enough to be used with any leadership development need for emerging leaders. I received approval from my consultancy coach and began developing the curriculum to pilot in two forums. The first forum occurred during an activity at the 2019 DEOL OLL. The second occurred at OCDSS for their agency leadership team in the fall of 2019. A second training session set for April 2020 at OCDSS had to be canceled due to constraints related to the COVID-19 pandemic.

2 Project Scope

2.1 Outline of Partnering Organization's Objectives

2.1.1 Objectives

GWU's DEOL program desired to provide a hands-on lab-like experience for its students that could function like a conference but provide a practical experience that could be applicable in one's professional life. My consultancy coach has a vision for this idea but limited resources to bring it to fruition. This project aided in a beta test of the idea to be taken into consideration for future OLL experiences.

OCDSS appointed a new director of the department within the last year. Upon assessment of the needs of her staff, she determined her front-line supervisors, managers, and other key leaders in her agency were in need of tangible leadership training. Her county management has also implemented a High Performance Organization (HPO) model, and her goal is to utilize this training to assist with meeting the goals of the HPO model. Many of her staff have been in leadership positions for years but have never received basic leadership skill development. This curriculum has helped aid her leadership team in moving toward high performance.

2.1.2 Success Criteria

Aspects of the curriculum were beta tested in two settings. The first setting was at GWU's OLL during the summer of 2019. A single simulation lab was conducted with roughly 45-50 participants in six different groups. Anonymous individual feedback was gathered post-simulation lab to assess feedback. Overall, the majority of participants expressed the simulation lab was applicable to their work. See section 7 for results.

The second setting was with the OCDSS leadership team made up of 31 participants. Two modules were completed with this group over the course of 2 days; and a feedback tool listed in Appendix B was used to assess satisfaction with the training, whether it is applicable to their work as leaders, and whether they can and will apply it after the training ended. A retrospective pre-post assessment was also used to measure each trainee's response-shift bias in knowledge gained regarding the topic, confidence gained in utilizing the tools learned, and commitment expressed to practicing the tools. Overall, participants reported an increased knowledge of the topics, confidence to apply the tools learned, and commitment to use the tools in their work as a leader. See section 7 for a breakdown of the results.

2.1.3 Risks

OCDSS presented a need for building leadership skills in their leadership staff. The director reported a risk of increased turnover, decreased morale, and

decreased work performance if her leadership team did not improve their leadership skills. This project has been helpful in mitigating those risks by offering opportunities to learn and practice soft skills in leadership.

2.2 Outline of Student's Objectives

2.2.1 Objectives

The objectives for this project were defined as follows:

- Objective 1: Develop the overall objectives, logistics, and information regarding implementation of the curriculum
- Objective 2: Develop leadership simulation curriculum
- Objective 3: Implement beta tested simulation modules and analyze effectiveness

I created a Gantt chart to map out the development, beta testing, and analysis of each module. As I finished modules, I tested them and made updates as needed. I did not finish writing all the curriculum before I began testing some of the initial modules.

2.2.2 Success Criteria

I measured success in two ways. First, I measured the percentage of curriculum I was able to write, test, and update based on my initial goal. Second, I measured the effectiveness of the curriculum I beta tested by assessing feedback from participants.

2.2.3 Risks

Risks posed included the risk of low demand for the curriculum and training, the risk of competition of other similar curriculum, the risk of a lack of priority and buy-in by the partnering agency, the risk of scope creep, and the risk of technology challenges, both in the use of technology during the training sessions and in the technological storage of training materials. Time commitment was also a risk, especially with changing my focus during the middle of the project.

2.3 Definitive Scope Statement

This project was responsible for developing and piloting an experiential learning curriculum for emerging leaders, applicable to one's real life experience as a leader but generic enough to be used by any organization interested in growing the leadership skills of their staff.

3 Deliverables

3.1 To Partnering Organization

Deliverables to the partnering organizations are listed below.

GWU OLL		
Deliverable	Description	Due date
Six Hats Simulation Overview and Facilitator Guide	This simulation overview and facilitator's guide provided information to each facilitator leading the small group exercise.	May 2019
Six Hats handout	This handout provided each participant an overview of the "Six Hats" model and a description of each color hat to be used during the simulated activity.	May 2019
On-sight facilitated activity	I facilitated the on-sight activity on June 1, 2019 at GWU.	June 2019
Feedback tool questions	Feedback questions were provided to the DEOL Coordinator to send to all participants for feedback.	June 2019
OCDSS		
MBTI Pre-Assessment	I sent this assessment to each participant on October 25, 2019 to complete by November 6, 2019. I provided the assessments to the participants as part of the day 1 training session.	November 2019
On-sight facilitated training, day 1	I facilitated the day 1 training in OCDSS on November 19, 2019.	November 2019
On-sight facilitated training, day 2	I facilitated the day 2 training in OCDSS on November 20, 2019.	November 2019
Feedback tools aggregate information	I sent the Director of OCDSS the aggregate feedback of the training sessions on November 30, 2019.	November 2019

3.2 From Student

Deliverables from the partnering organizations are listed below.

GWU OLL		
Deliverable	Description	Due date
Aggregate feedback information	Feedback from the questionnaire was provided to me by GWU's DEOL Coordinator on June 18, 2019.	June 2019
OCDSS		
MBTI Pre-Assessment	I sent this assessment to each participant on October 25, 2019 and all participants were given a November 6, 2019 deadline. They all completed the assessment in a timely manner.	November 2019
OCDSS Internal Feedback information	The Director completed an additional feedback survey to determine other topics of interest and provided me with the information on November 26, 2019.	November 2019

4 Project Approach

4.1 Project Lifecycle Processes

The project life cycle is divided into four phases as follows:

Phase 1: Development of curriculum objectives, logistics, and material

- Phase 1 overlapped with phase 2 as I continued to work on researching and writing modules while testing those as I finished them. I plotted the information on a Gantt chart to capture the requirements, timeline, and deadlines for this phase. The Gantt chart is outlined in section 5.

Phase 2: Implement beta testing of the curriculum

- Beta testing occurred in two settings. The first setting was at GWU's OLL where one 45 minute facilitated simulation occurred with students within the DEOL program. The second setting, at OCDSS, occurred on 2 consecutive days from 9 a.m. to 4 p.m. with the agency's leadership team.

Phase 3: Gather and analyze feedback of the curriculum

- Feedback was gathered electronically for the first setting within a week of the OLL date and analyzed upon receipt of the results. Feedback for the second setting occurred at the end of each day on-site using paper copy feedback forms. Both settings gathered feedback anonymously and voluntarily. An additional impromptu group discussion regarding feedback of "what worked" and "what needs improvement" was also used at the end of each day for the second setting.

Phase 4: Make necessary adjustments to curriculum based on feedback

- Upon analysis of feedback gathered from setting 1, I made updates to the curriculum to be incorporated for future training sessions.
- For the second setting, after hearing the impromptu verbal feedback at the end of day 1, I made immediate adjustments for the delivery of materials on day 2. I also incorporated written feedback into the training materials to be used for future training sessions.

4.2 Project Management Processes

Project management processes for the OLL setting involved the consultancy coach and OLL planning committee. The OLL planning committee met on a monthly basis from November 2018 to May 2019. The committee discussed all aspects of the OLL conference, and I received feedback from this committee on plans for the simulation lab prior to implementation.

Project management processes for the OCDSS training session involved the director of OCDSS. The director subsequently had internal conversations with her leadership team, technology team, and others to ensure all logistics were ready for the training.

4.3 Project Support Processes

This project was supported by the consultancy coach upon inception. The consultancy coach engaged the OLL planning committee and other GWU faculty for support of beta testing the curriculum at the 2019 OLL. As of August 2019, when the OCDSS director became aware of the project, she and her leadership team supported implementation of a training session at their agency.

4.4 Organization

4.4.1 Project Team

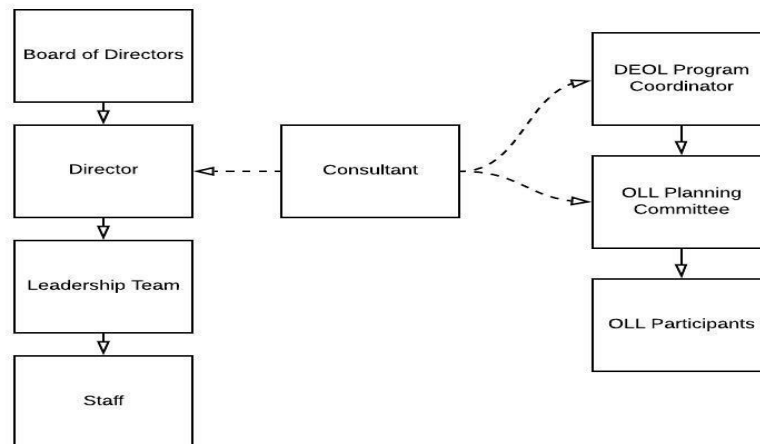
The project team included the following:

- Doctoral Student-Project team lead, trainer
- Project site advisors
 - DEOL Program Coordinator & Assistant Professor
 - OCDSS Director
- OLL Planning committee
- Training Participants
 - OLL Conference Participants
 - OCDSS Leadership Team

A Gantt chart was used to formally structure the work on a timeline. The Gantt chart was divided into three project phases of work to be completed. The Gantt chart is outlined in Section 5.

4.4.2 Mapping Between OCDSS and Student and GWU DEOL and Student

The chart below outlines mapping between me and OCDSS on the left and me and GWU on the right.



5 Communications Plan

The table below outlines how communication occurred with identified stakeholders.

Who-Stakeholder	What Info do they need?	Why do they need it?	When will they get it?	How will they get it?
OLL Beta testing Site				
OLL Planning Committee	-Overview of Simulation Lab -Copies of Simulation Lab Materials	-Need to approve for use at OLL	-Received prior to OLL's final planning meeting	-Emailed copies
DEOL Site advisor	-Overview of Simulation Lab -Copies of Simulation Lab Materials	-Need to approve for use at OLL -Printed copies for participants	-Received prior to OLL's final planning meeting -Received prior to OLL event	-Emailed copies
OLL Lab Facilitators	-Overview of Simulation Lab -Copy of simulation lab materials along with facilitator notes	-They completed role of facilitator during the event and needed the guide for reference	-Received prior to the start of the OLL event	-Given hard copies at OLL event
OLL Participants	-Directions for Lab -Feedback forms	-To be able to fully participate in experience -Need to be able to provide feedback regarding experience	-Received at the start of the facilitated activity -After OLL ended	-Given verbally by facilitator -Feedback survey sent via email for anonymous feedback
OCDSS Beta testing Site				
OCDSS Site advisor	-Overview of training agenda, objectives, and materials -Copies of training materials	-Needed to approve training schedule and give direction to staff -Printed copies of materials for	-One month prior to training, discussion occurred regarding agenda and objectives and list of	-All materials were sent via email

		training participants	objectives was sent to site advisor -Two weeks prior to training date, materials were sent	
OCDSS Participants	-Directions regarding pre-assessment materials -Pre-assessment handouts -In-session handouts, directions, and training materials -Feedback forms	-Participants needed directions and access to take pre-assessment on-line -During training, participants needed direction and materials to fully participate in training -Feedback forms allowed feedback to be gathered regarding experience	-Directions and access to the assessment were sent 2 weeks prior to training date -All other materials and directions were shared during the training -Feedback forms were provided at the end of the training	-Directions and access to the assessment were sent via email. -Other materials and feedback forms were given as hard copies in person at the training

- Training space
- MBTI online assessment tool and funds to purchase the assessment for participants

7 Milestones

Milestone Number	Title	Forecast date
1	Consultancy proposal and purpose <ul style="list-style-type: none"> ● Assessed needs of DEOL's OLL event ● Developed initial proposal with DEOL site advisor 	Fall 2017
2	Project goals and objectives <ul style="list-style-type: none"> ● Create goals and objectives to meet OLL's 2019 summer event's needs 	Spring 2018
3	Scope of work <ul style="list-style-type: none"> ● Assessed in and out of scope work 	Spring 2018
4	Project Summary and Benefits <ul style="list-style-type: none"> ● Outlined benefits for partnering agency and doctoral student ● Assessed risks and contingency plan associated with benefits 	Summer 2018
5	Risk Assessment/Contingency Plan <ul style="list-style-type: none"> ● Further explored risk ● Developed risk categories, levels, and mitigation plans ● Outlined detailed contingency plan 	Fall 2018
6	Reassessed and revised proposal <ul style="list-style-type: none"> ● Updated proposal to expand scope ● Revised objectives 	Fall 2018
7	Curriculum Development <ul style="list-style-type: none"> ● Completed Module 1 	Spring 2019
8	Assumptions and Constraints <ul style="list-style-type: none"> ● Outlined assumptions with project and validated each assumption ● Assessed restrictions and constraints 	Spring 2019
9	Reviewed objectives to ensure they were still relevant	Spring 2019
10	Curriculum Development <ul style="list-style-type: none"> ● Completed Module 2 and 3 	Summer 2019
11	Strategies and Activities <ul style="list-style-type: none"> ● Outlined and assessed expected outcomes for each objective's strategies and activities 	Summer 2019
12	OLL Beta Test <ul style="list-style-type: none"> ● Prepared materials for simulation exercise ● Facilitated simulation ● Gather and assessed feedback 	Summer 2019
13	Results to Date <ul style="list-style-type: none"> ● Assessed project results to date 	Summer 2019
14	Communication Plan <ul style="list-style-type: none"> ● Developed communication objectives ● Determined target audiences ● Developed positioning statement 	Summer 2019

	<ul style="list-style-type: none"> ● Outlined communication platforms, messaging, campaigns, activities, target outcomes, and timeline 	
15	Budget <ul style="list-style-type: none"> ● Outlined project start-up expenses, service fees, and net revenue projects ● Analyzed and validated budget assumptions 	Summer 2019
16	Curriculum Development <ul style="list-style-type: none"> ● Completed Module 4 	Fall 2019
17	Quality Assurance Plan <ul style="list-style-type: none"> ● Developed training logic model ● Utilized the PDCA cycle 	Fall 2019
18	OCDSS Beta Test <ul style="list-style-type: none"> ● Prepared materials for training ● Facilitated training ● Gather and assessed feedback 	Fall 2019
19	Reorganized Curriculum modules	Spring 2020
20	Plan Performance Update <ul style="list-style-type: none"> ● Assessed overall progress on project 	Spring 2020
21	Professional Literature Review <ul style="list-style-type: none"> ● Researched current literature on experiential learning ● Wrote Professional Literature Review 	Spring 2020
22	Executive Summary <ul style="list-style-type: none"> ● Submitted final product 	Summer 2020

8 Metrics and Results

Three types of analysis tools were developed to assess the effectiveness of the curriculum.

1. Plus/Delta group feedback

- a. Feedback directly at the end of each day was gathered in a group setting on what worked and could be improved.

2. Trainee Self-Reflection feedback form (see Appendix B)

- a. Feedback is focused on satisfaction with the training, whether it is applicable to one's work as a leader, whether one can and will apply it after the training is over.

3. Retrospective pre-post assessment (see Appendix A)

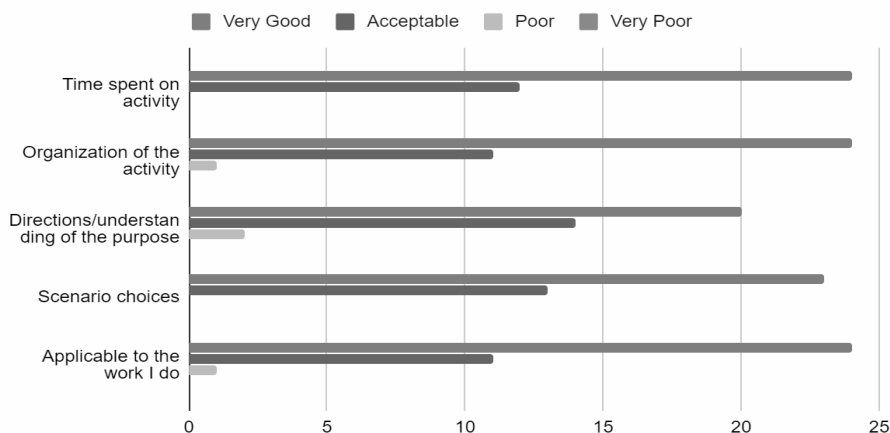
- a. This response bias shift assessment measures the trainee's self-perception of the following:
 - i. Knowledge gained from the training
 - ii. Confidence gained in utilizing the tools learned
 - iii. Commitment to practicing the tools learned

GWU 2019 OLL feedback.

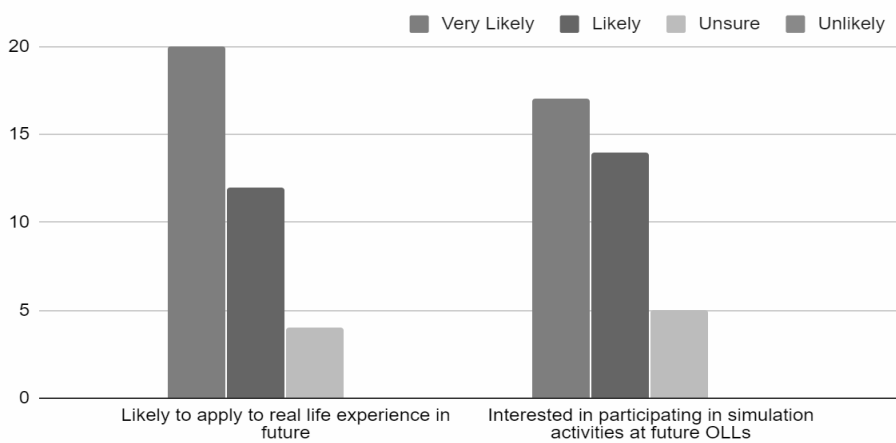
See the results from the first setting's beta testing below.

Trainee Self-Reflection feedback form.

Satisfaction with the "Six Hats" Simulation Activity



"Six Hats" Simulation Activity Feedback



OCDSS feedback.

See the results from the second setting's beta testing below.

1. Plus/Delta group feedback.**Day 1**

Pluses (What worked well?)	Deltas (What could be improved?)
<ul style="list-style-type: none"> • Communication and participation 	<ul style="list-style-type: none"> • Bigger slides
<ul style="list-style-type: none"> • Group Activities 	<ul style="list-style-type: none"> • Printouts/handouts
<ul style="list-style-type: none"> • Schedule 	<ul style="list-style-type: none"> • Written agenda (handout)
<ul style="list-style-type: none"> • Balance between group/individual activities 	
<ul style="list-style-type: none"> • Good flow 	
<ul style="list-style-type: none"> • Good balance 	
<ul style="list-style-type: none"> • Kept it moving 	
<ul style="list-style-type: none"> • Liked historical overview at beginning 	

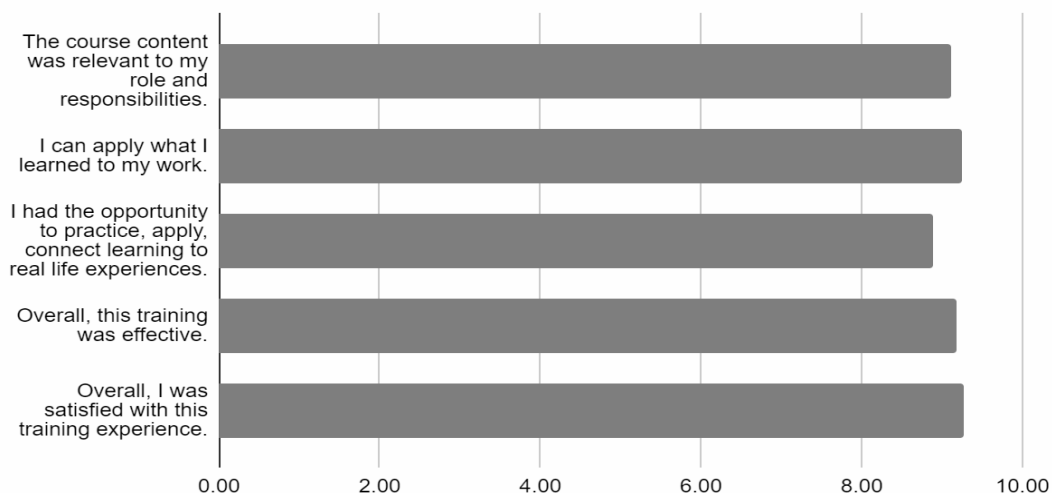
Day 2

Pluses (What worked well?)	Deltas (What could be improved?)
Role play	Different scenarios for role plays
Video	More about motivation
Teachbacks	Smaller groups (group split on this)
Observation and picking out parts/answers	
Graph with styles plotted out	
Emailing notes ahead of time	
Agenda	
Mix of the group was good	
Slides (could see better)	

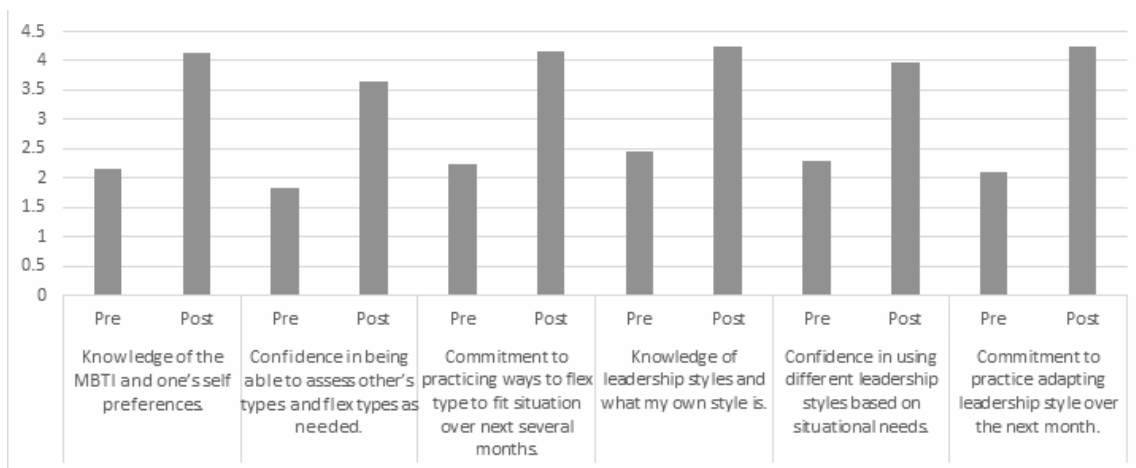
2. Trainee Self-Reflection feedback form.

Questions Score from 1 (Strongly Disagree) to 10 (Strongly Agree)	Day 1 Ave Score	Day 2 Ave Score	Total Average
I was interested/motivated to attend this training.	8.23	8.21	8.22
The trainer's style kept me engaged and contributed to my learning experience.	8.61	8.89	8.75
There was a good mix of materials (presentations, videos, discussions, exercises, role play, etc)	8.90	9.07	8.99
The trainer and training material was easy to follow.	8.90	9.00	8.95
The course content was relevant to my role and responsibilities.	9.10	9.11	9.10
I can apply what I learned to my work.	9.10	9.39	9.24
I was able to relate my existing knowledge and experience to the new knowledge I gained.	8.90	9.14	9.02
I had the opportunity to practice, apply, and connect my learning to real life experiences.	8.74	9.04	8.89
Overall, this training was effective.	8.94	9.43	9.18
Overall, I was satisfied with this training experience.	9.10	9.43	9.26

Onslow DSS Feedback to Leadership Training



3. Retrospective Pre-Post Assessment.



9 Risks, Constraints, Assumptions

9.1 Risks

Risk Description	Mitigation Plan (what to do to avoid the risk occurring)	Contingency Plan (what to do if the risk occurs)	Impact (what the impact will be to the project if the risk occurs)	Likelihood of occurrence (e.g., %, or high/medium/low)
Potential Low Demand for Service	Conduct client needs and readiness assessments to determine the level of the need within different sectors and/or regions.	Budget a 6-month contingency fund to cover costs and use the budgeted fund when needed.	High	Medium
Competition	Assess where the gaps in services are to then tailor services to meet the gaps and market appropriately.	Reassess marketing strategies.	Medium	Medium
Lack of Priority for Market	Market the service in a way that points out how utilizing a service could reduce turnover of staff, cut costs, improve efficiency, and enhance the organizational culture. Once service has been in place for a period of time, gather data on impact to demonstrate outcomes.	Reassess marketing strategies.	Medium	Medium
Relevance of Materials	Remain up to date on newest and most relevant research and information.	Update materials as new information is received.	Low	Low
Plagiarism by clients	Evaluate any needs for patents or other types of source referencing protection.	Consult insurance and legal services.	Medium	Low
Preservation of Materials	Ensure copies are stored in multiple locations and that security is kept as up to date.	Reevaluate security measures put in place.	High	Low

9.2 Constraints

An outline of constraints I faced during this project implementation is listed below.

Constraints	Description
Testing restrictions based on completion date/timeline.	As the curriculum was developed it could be tested. However, due to time constraints in developing the curriculum, testing could not occur until development was complete.
Learning materials are based on available research.	Any leadership research that is either not published or made available created restraints on what was used in the curriculum.
Testing restrictions were based on availability of pilot groups.	Two agencies made themselves available for testing.
“Stay at Home” order restricted further testing.	A third testing session was cancelled in April of 2020 due to the North Carolina Executive Order restricting contact in group sessions during the COVID-19 Pandemic.

9.3 Assumptions

An outline of assumptions and how each was validated is listed below.

Assumptions	Validations
There is a need/demand for this curriculum.	Leaders of multiple agencies have confirmed a need for leadership training is a need within their agency. Much research also supports the assumption that leadership curriculum is desired by agencies across multiple sectors.
Simulation based training will meet needs that lecture based training will not.	Hands-on/multi-sensory learning has been researched for years and many have found increased learning through this type of learning environment versus lecture or single-sensory learning (Medina, 2014) and (Douglas & McKenzie, 2016).

There will be updated information on leadership training available to review.	Leadership topics are continuously researched and up to date information is available through published resources.
There is time to develop all workshop materials.	A plan and timeline was developed with accountability measures in place to ensure all workshop materials are created timely.
Materials will be tested as they are being developed.	Testing occurred at GWU's 2019 OLL and at OCDSS in November 2019.
Measurements used to test the impact of the materials will give valid and reliable data.	Feedback was gathered through surveys, in person feedback, and a Retrospective Pre-Post Assessment.

10 Financial Plan

Much of this project did not require an initial budget. The beta testing at both organizations did not cost either organization funding outside of what was listed below.

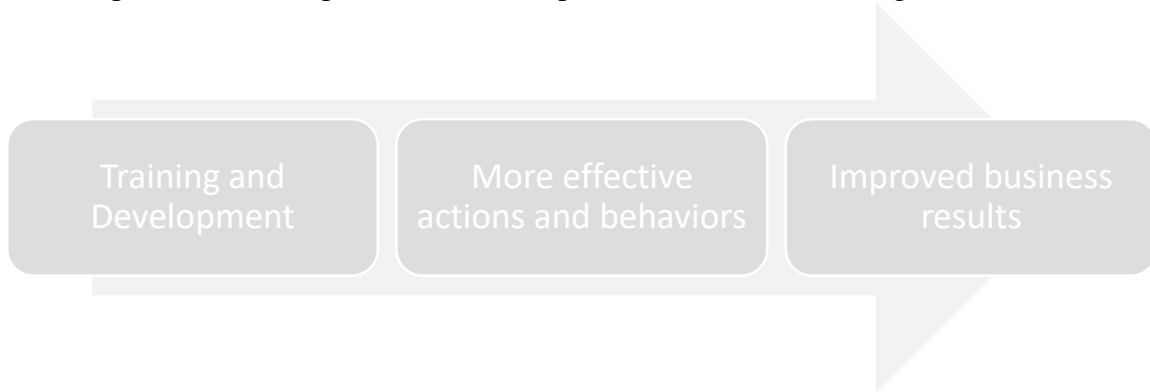
GWU's OLL event utilized their set budget for the event and the facilitated activity was worked into the day's schedule without additional costs. OCDSS paid for the travel, food, lodging, training materials, and the cost of the MBTI assessment for each participant out of their training budget.

11 Quality Assurance Plan

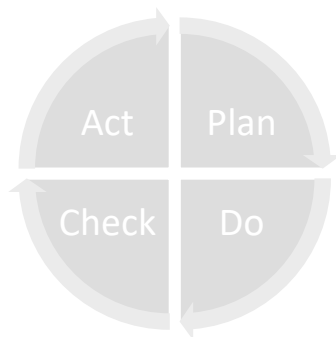
As described by Kirkpatrick and Kirkpatrick (2016), the theory of change for training and development is grounded in a logic model that shows the relationship among resources, activities, outputs, and outcomes. This model is illustrated below:



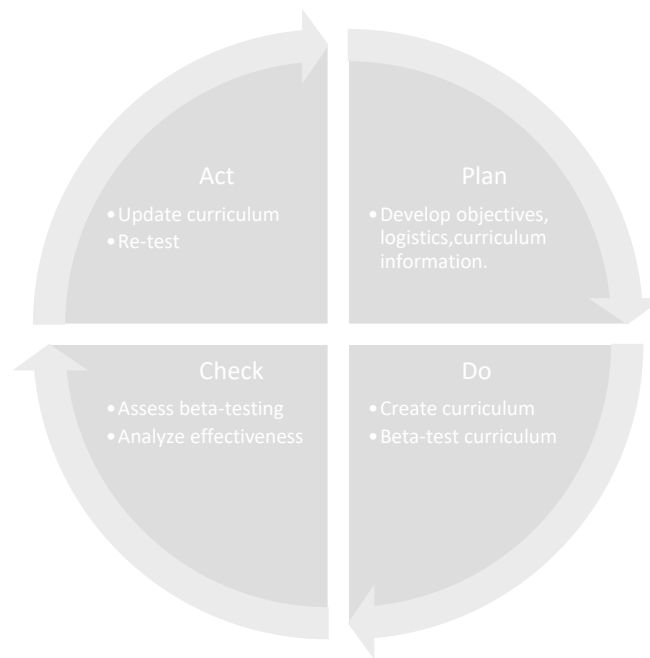
Kirkpatrick and Kirkpatrick (2016) adopted this model for training as follows:



In determining if training is effective and in turn leads to intended outcomes, the fundamental Plan, Do, Check, Act Cycle, or Deming wheel, credited to William Deming, is crucial.



The following visual outlines this project's PDCA cycle.



Plan	A Gantt chart was developed to drive the work to completion. All curriculum was targeted to be completed by February 2020. However, due to an expansion of Module 2 and curriculum reorganization, completion target dates were adjusted.
Do	<p>Aspects of the curriculum were beta testing in two settings.</p> <ul style="list-style-type: none"> • The first setting was at GWU’s OLL during the summer of 2019. A single simulation lab was conducted with roughly 45-50 participants in six different groups. Anonymous individual feedback was gathered after the simulation lab to use for the “Check” phase to improve curriculum. • The second setting was with the OCDSS leadership team made up of 31 participants. Two modules were completed with this group over the course of 2 days and each of the feedback tools listed below were used for the “check” phase for analysis.
Check	<p>Three types of analysis tools were used to assess the beta test settings.</p> <ol style="list-style-type: none"> 1. Plus/Delta group feedback <ol style="list-style-type: none"> a. Feedback gathered directly at the end of each day in an open forum group setting. 2. Trainee Self-Reflection feedback form (see Appendix B) <ol style="list-style-type: none"> a. Feedback gathered on paper at the end of each day focusing on satisfaction with the training, whether it is applicable to

	<p>one's work as a leader, whether one can and will apply it after the training is over.</p> <ol style="list-style-type: none"> 3. Retrospective pre-post assessment (see Appendix A) <ol style="list-style-type: none"> a. Feedback gathered to measure each trainee's self-perceived shift in the following: <ol style="list-style-type: none"> i. Knowledge gained from the training ii. Confidence gained in utilizing the tools learned iii. Commitment to practicing the tools learned
Act	<p>Feedback from the three tools was or will be implemented for the next beta testing of future modules. Below are examples of specific recommendations that will be implemented:</p> <ol style="list-style-type: none"> 1. Provide a handout of the slides to participants at the beginning of each module to use for note taking. 2. Ensure "ground rules" are created and used at the beginning of each session to ensure sidebar conversations and other parameters are set and agreed upon by participants. 3. Update slides to ensure all slides wording are large enough to see from far away. 4. Create a "cheatsheet" for the MBTI types and other handouts to give participants as printed materials. 5. Assess the size of the group more thoroughly with leadership to ensure the right size group and right size training space is in place. 6. Provide additional scenarios for role plays. 7. Practice how directions for activities are given to ensure full clarity to all participants. 8. Provide "examples" of activities for any that might not be clear. 9. Develop a list of stories/examples for each concept and ensure they cover a broad range of industries.

Comments:

1 2 3 4 5	Commitment to practice adapting leadership style over the next month.	1 2 3 4 5
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Comments:

Please add any additional comments you would like to add regarding this learning session:

Appendix B
Feedback Form

Module	Title
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Assess each question by circling your response.		Strongly Disagree	Strongly Agree
1	I was interested/motivated to attend this training.	1	2 3 4 5 6 7 8 9 10
2	The trainer's style kept me engaged and contributed to my learning experience.	1	2 3 4 5 6 7 8 9 10
3	There was a good mix of materials (presentations, videos, discussions, exercises, role play, etc)	1	2 3 4 5 6 7 8 9 10
4	The trainer and training material was easy to follow.	1	2 3 4 5 6 7 8 9 10
5	The course content was relevant to my role and responsibilities.	1	2 3 4 5 6 7 8 9 10
6	I can apply what I learned to my work.	1	2 3 4 5 6 7 8 9 10
7	I was able to relate my existing knowledge and experience to the new knowledge I gained.	1	2 3 4 5 6 7 8 9 10
8	I had the opportunity to practice, apply, and connect my learning to real life experiences.	1	2 3 4 5 6 7 8 9 10
9	Overall, this training was effective.	1	2 3 4 5 6 7 8 9 10
10	Overall, I was satisfied with this training experience.	1	2 3 4 5 6 7 8 9 10

11. Please rate the length of time for this session.	Too Short	Just Right	Too Long
12. Please rate the appropriateness of the group size.	Too Small	Just Right	Too Large

<p>12. What is the FIRST thing you plan to implement from what you learned in this session? What supports will you need to implement what you learned?</p>

13. What aspect of the training was most beneficial?

14. What would you change to make this learning session better?

14. Please add any additional comments you would like to add regarding this learning session:

Appendix C

Professional Literature Review

Introduction

Providing high quality professional development and training, specifically regarding leadership skills, can be a daunting task for any organization. Ensuring the training experience provides a substantial return on investment that leads to a transfer of learning and implementation into one's daily work takes intentional strategy. An i4cp research study surveyed approximately 700 organizational leaders and found that 78% of them "affirmed that leadership development was critical to their companies, but only 28% claimed to be highly effective in developing leaders" (Association of Talent Development [ATD], 2016, p. 5).

My goal for this literature review was to determine if using experiential learning curriculum with teaching, practicing, and reflecting components was appropriate. I partnered with two organizations to beta test aspects of a leadership curriculum I developed. Initially, both organizations noted a gap between positional leadership and demonstrated leadership soft skills. One organization desired a "lab experience" for participants to practice leadership skills in a safe environment. The other organization reported that a significant percentage of its front-line supervisor level personnel had not received adequate leadership training when they were promoted which in turn led to a gap in leadership skills across the board. This organization's leader anecdotally believed "hands-on" leadership training would benefit her front-line and mid-level leadership team.

Experiential Learning

As part of this professional literature review, I reviewed 26 research articles and professional publications regarding experiential learning, games, and simulations and the impacts

of learning styles, debriefing, and self-reflection on the transfer of learning in training. Some of the articles focused on leadership as the training topic, while other articles and literature varied in the training material topics. After reviewing each article for key themes and takeaways, I sorted them into four main themes. The first theme is regarding the use of role play and simulations in experiential learning. The second theme is in relation to the use of games in learning. The third theme concerns the importance of the learner's contribution to the process, specifically relating to learning style and reflection. Finally, the last theme is regarding the importance of the debriefing process. I used the themes to guide the organization of my teaching materials into three areas by adopting Horton's (2012) Absorb, Do, Connect model outlined in his book, *E-Learning by Design*. While my curriculum is not designed specifically for E-learning, I found the Absorb, Do, Connect model to align with the research themes I reviewed regarding experiential learning.

Within Horton's (2012) model, the Absorb category includes learning activities where "the learner may be physically passive yet mentally active--actively perceiving, processing, consolidating, considering, and judging the information" (p. 67). Specific examples could include, lectures, presentations, reading and reviewing materials, watching videos, listening to audible material, and taking field trips. The Do category includes activities the learner puts into action during the training. Examples can include hands-on tasks, simulated role plays, teamwork activities, case studies, lab-like exercises, and games (Horton, 2012). The Connect category includes activities that "help learners close the gap between learning and the rest of their lives" (Horton, 2012, p. 163). Examples include activities that allow one to question, reflect, and journal. Reviewing research, using job aids, reading stories, and creating personal work can all provide a connection and meaning from the learned knowledge to one's daily life (Horton,

2012).

Experiential learning is defined as “the process whereby knowledge is created through the transformation of experience” (Mainemelis et al., 2002, p. 5). Kolb developed the Experiential Learning Theory (ELT) in 1984 and described the process as a four step “cycle of experiencing, reflecting, thinking, and acting” (Kolb & Kolb, 2009, p. 297). It can be organized into multiple categories including action learning, on-the-job learning, simulations, and serious games. Action learning is learning that “occurs when individuals or small groups actively work and learn in the process of developing solutions for real-world business problems” (ATD, 2016, p. 6). On-the-job learning occurs during work, both informally and formally; and through practice, coaching, job swapping, shadowing, and observation. Serious games, simulations, and role play replicate interactive real-life scenarios for participants. They can occur in person or virtually (ATD, 2016). For the purpose of this literature review, I focused on simulations, role plays and in-person action-learning games.

Simulations and role play. Simulations can be defined as “evolving case studies of a social or physical reality [where] participants play real-life roles with well-defined responsibilities and constraints (Knobloch, 2005, p. 21). Across the board, role plays and simulations were reported to be valuable training techniques, depending on the type of learning necessary. Börner et al. (2012) described four types of learning as defined by Klippert (2009). They are “content and factual learning, methodological and strategic learning, social and communicative learning, and affective learning” (Börner et al., 2012, pp. 202-203). Simulations are valuable for the last three types of learning defined by Klippert. Methodological and strategic learning focuses on how to think critically and apply the knowledge strategically. Social and communicative learning focuses on building social competence in teams and other social

situations and affective learning focuses on developing personal values, skills, and talents (Börner et al., 2012). Role play can accelerate learning and build confidence by applying theory, practicing behaviors, offering opportunity for perception changes, and connecting knowledge to real life. However, participant engagement and buy-in to the process is necessary (Agboola Soguro, 2004; Hess, 2007). In a study completed by Chen et al. (2003) regarding the improvement of communication skills in information systems, professionals showed statistically significant results regarding “both content and process related skills” (p. 70). In other words, they found that communication skills were improved through the use of role play.

Some criticisms of role play and simulations have been noted in the literature. Specifically, using role play takes “time, expertise, and resources” (Agboola Soguro, 2004, p. 12). If the purpose of role play is not clearly defined, it can lead to conflict or confusion and do more harm than good. Role play is also sometimes limited to focusing on “one subskill at a time” (Hess, 2007, p. 198) and should not be used to meet too many objectives at one time (Börner et al., 2012).

Games. “Training games are a form of experiential learning typically used to facilitate dynamic group processes” (Karve, 2011, p. 30). Games in training, including what is dubbed “serious games,” has become its own discipline (Crookall, 2010). The use of games has grown both in complexity and variety. Some individuals believe it is difficult to define a training game, but it is easy to spot when it happens (Crookall, 2010). The term serious game has been defined to “include games that make use of computer technology and advanced video graphics and that are used for the purposes of learning and training” (Crookall, 2010, p. 905) and often feel like they are designed for entertainment even though their purpose is teaching (Buzady, 2017).

Games are used for a number of purposes in training. For this literature review, I focused

on games used in face-to-face settings rather than the serious games that include virtual settings. Games can be used to meet the following goals: “a) practice already-acquired knowledge and skills, b) identify gaps or weaknesses in knowledge or skills, c) serve as a summary activity or review, and, d) develop new relationships among concepts or principles” (Knobloch, 2005, p. 21). One article described games as “competitive exercises” (Knobloch, 2005, p. 21) used to gain information but cautioned against having a pure winner and loser so the value of the process is not lost.

Games can be fun and engaging and lead to higher levels of learning in shorter periods of time. Games do not require as much context as simulations and one can remain in a detached mindset or place of make-believe. They can allow simplification of a complex situation. The action-orientedness, use of rules, and non-linear approach can also be beneficial to learning in a different way. They also allow participants to make mistakes without causing lasting consequences and receive feedback where they might not otherwise (Horton, 2012; Petroski, 2012).

Games may fall short compared to simulations when a more intentional context for learning is necessary or more personal learning is needed. Because games are not typically built around real life, the lack of a scenario or more detailed backstory may not be appropriate for specific learning objectives (Petroski, 2012). Games are appropriate to use when the following circumstances are present:

Costs of failure are high, learning with real systems is not practical, learners need individual attention, many people must be educated, tasks are complex and time is short, skills to be taught are subtle and complex, and [there is the] time and the budget to see the project through. (Horton, 2012, pp. 329-330)

Learner's contribution. Learning cannot occur without the learner's openness to receiving what is taught. Numerous articles referenced different aspects of the learner that I have summarized as the learner's contribution. One element of the learner's input is their learning style. A study completed by Mainemelis et al. (2002) found that learning style impacts the ability to learn in an experiential learning environment and that those with "learning styles that balanced experience and conceptualizing respond more flexibly in adapting" (p. 22) to those types of learning environments. Khatun (2013) referenced Kolb's ELT and the impact of learning style on the ability to learn leadership skills. Kolb first developed the ELT and Kolb Learning Style Inventory in 1969 and numerous studies over the years have tested and advanced his work (Kolb & Kolb, 2009).

Self-reflection through the use of feedback, debriefing, and thoughtful processing is another important factor in experiential learning. For experiential learning to work, the learner must believe they have the ability to learn. "In ELT people who see themselves as learners are those who trust their direct personal experiences and their ability to learn from them" (Kolb & Kolb, 2009, p. 304). Kolb and Kolb (2009) explained that trust in the experience and in the learning process are keys to learning. The learner must not see their own learning as fixed; they cannot be their own barrier.

Debriefing

Feedback during and right after a simulation or role play is valuable for in-the-moment learning. Debriefing can occur within an individualized setting or in a more general group setting. Both types of debriefing are valuable (Crookall, 2010). Crookall (2010) noted that debriefing is often not utilized to the fullest potential. "Learning comes from the debriefing, not from the game" (Crookall, 2010, p. 907). Crookall went on to explain how deep lessons are

learned during the debrief, and participants are able to share and learn from each other. Debriefing immediately after a simulation can promote reflective thinking. However, the facilitator of the debriefing session must be skilled to ensure the best outcome (Decker et al., 2013). Crookall also recommended developing the training curriculum and experiential element with the debrief in mind from the beginning and to allow for a longer, more serious time of discussion to ensure transfer of learning occurs (Hess, 2007; Petroski, 2012; Rosenman et al., 2019).

Regarding written debriefing, one small study found that written debriefing in the form of journaling was appreciated more than blogging. This particular study noted that the participants were all of the age where they have grown up with social media and that fact may have contributed to their point of view (Reed, 2015). They reported blogging to be “not helpful and really annoying” (Reed, 2015, p. 547). They did not see the value in sharing their personal reflections with others to make comments; however, they appreciated journaling because it allowed privacy and gave “students the opportunity to express what they were thinking without worrying about peer review” (Reed, 2015, p. 547). In another study, blogging was found to be an effective reflective learning tool. The study introduced reflective learning’s purpose as a way to “internalize information and develop a deeper understanding of what happened--to transform an experience into learning, to make meaning of new information, and advance from surface to deep thinking and learning” (Raffo, 2012, p. 42). Raffo (2012) cautioned that some blogging can produce problems when the participants do not provide thoughtful input. However, the findings of the study support the effectiveness of blogging as a learning tool. The article ends with several steps a leader can take to incorporate blogging into the learning process (Raffo, 2012).

Summary

My goal for this literature review was to determine if using experiential learning curriculum with teaching, practicing, and reflecting components was appropriate. The organizations with whom I have partnered anecdotally believed experiential learning would benefit their participants in learning leadership skills. As I reviewed the literature, I determined the key themes in relation to the use of experiential curriculum. First, simulations, role plays, and games all have their value in experiential learning. However, they must be used appropriately based on the objectives and the needs of the learning environment. Role plays and simulations are appropriate for practicing very specific skills or subskills, when time and resources are available, and when it is necessary to provide a real-life context to the learning environment. Games are appropriate for shorter periods of times, for simplifying complex issues, and for learning objectives when real-life scenarios are not feasible (Agboola Soguro, 2004; Börner et al., 2012; Crookall, 2010; Hess, 2007; Horton, 2012; Knobloch, 2005; Petroski, 2012).

Second, the learner must be engaged in the process. Even if the highest quality games or simulations are used, if the learner has not bought into the process and does not believe they can learn, even the best learning tools will not be effective. The learner's learning style plays a role; but more importantly, their ability to reflect on what they have learned and to participate in debriefing is a necessity. Last, the use of debriefs, whether in a group setting or individually and whether orally or written, must be well planned and well executed. Debriefing is as important if not more important to the learning process than the actual experience itself (Crookall, 2010; Hess, 2007; Petroski, 2012; Raffo, 2012; Reed, 2015; Rosenman et al., 2019).

From reviewing these articles and publications, I believed it was appropriate to organize my curriculum into the three Absorb, Do, Connect categories defined by Horton (2012), while

spending a significant amount of energy and thought in developing the reflective and debriefing aspects of the curriculum.

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