

Course Syllabus

Course Number: UU-B-TLG
Course Name: Transformational Leadership, Strategy and Governance

This course will run for 15 weeks



Whenever there is a question about what assignments are due, please remember this syllabus is considered the ruling document.

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Facilitator Information

Short bio

I am Ubiquity University's Chief Innovation Officer, and an instructor in Ubiquity University's Undergraduate School and the Wisdom School of Graduate Studies. I am Chair of the Center for Human Emergence (Netherlands)—and a founding partner of Engage!. I've worked in and across different sectors. My experience includes facilitating integral change processes in multinational corporations, and government ministries, and in multistakeholder initiatives with global stakeholders. I have also spent many years in the not-for-profit and life-long learning sectors. I'm a recognized expert in the field of evolutionary systems dynamics. I have had my first book published in English and Dutch (Evolutionary Leadership). I'm an experienced designer of learning processes and host of collective inquiry and collaboration. I also have a background in theatre and folk music.

Having experienced the limits of more traditional approaches to societal change, my current focus is on researching the application of frontier science to whole systems transitions. As part of this, I am a Ph.D. student with Ubiquity's Wisdom School and have a diploma in systemic energy work with the Dutch-based Center for ECOtherapy.

I also teach on the undergraduate Personal Leadership and Social Innovation core course.

Contacting the faculty

Faculty name: Peter Merry

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I will check and respond to the Discussion Forum and emails daily, between 0900-1700 CET.

For emergencies, when you are not able to gain access to messages on the Online Learning System, please send a message to my course email address, as above. In the event a third party needs to contact me, please direct them to my contact information listed under "facilitator information." No third party should use your login credentials to gain access to the classroom.

Course Description

In today's rapidly changing world, learning to lead and design our communities and organizations to ride the turbulence creatively is critical to our ability to make a positive impact. This course covers the subject of evolutionary change, and the implications for us as individual leaders, as well as for our organizational cultures and structures. It combines intellectual rigor with personal challenge, collaboration with creative expression. Students engage with integrative maps of organizational and leadership development, as well as instantly applicable practices for becoming more effective and dynamic as individuals and collectives.

The main subjects covered include:

- Transformation and Change
- The Learning Organization
- Levels of Leadership Development
- Practices for Transformational Leadership
- Personal Effectiveness and Resilience
- Organizational Culture
- Tools for Collaboration
- Levels of Organizational Development
- Creating an Agile Organization
- Practices from the Future

Course Learning Outcomes

By the end of the course students should be able to:

- Express clearly the nature of evolutionary change as compared to other types of change
- Reflect constructively on their own and others' leadership capacity
- Improve their leadership capacity by taking concrete steps
- Analyze and describe an organization in terms of its level of development and agility
- Choose appropriate implementation tools for large-scale collaboration
- Describe the impact of transformational leadership, strategy and governance in an organization

Instructional Mode and Methods

This course is a combination of three major learning approaches:

- 1) Online learning with a wide array of materials and activities each week, including interaction with peers (videos, essays, journaling, quizzes, etc.),
- 2) Collaborative learning where you develop skills ranging from creative cooperation to critical thinking and engaged listening.
- 3) Self-reflection and self-development where you take the time to discover your qualities and potential.

The Online Learning aspect of this course has key components for you to work with:

- Video presentations by the key faculty. The average video is from 5 to 15 minutes long although in special instances, some may be longer.
- Quizzes: All weeks will include one or more quizzes. This allows the faculty to see how well students are relating to and understanding the material.
- Integration Tasks: These represent short tasks of 15 minutes or so to take in what has been presented. A question may be asked for journaling or for quiet reflection.
- Forum discussions are an important part of this course. Each week one or more questions will be presented for discussion, generally among the small cohort group to which you will be assigned.
- Journaling: Each person has a private journaling space that only they, and the faculty (the primary faculty and teaching assistant), have access to – unless the student chooses to share it with others. This is important for the student's self-reflection and regular journaling of even a sentence or two of reflection contributes to the your grade.
- Creative Assignment: You will have one collaborative "creative assignment" to complete during the course of the semester. You will receive feedback from a community of peers and faculty on your assignment.
- Materials: Each week there will be some required learning resources and a number of optional resources. A student's grade can be improved by demonstrating familiarity with optional resources in addition to those that are required.
- Extra Videos: In addition to the required videos for each week's learning, there will be additional videos for students that want to expand their inquiry in a particular area.

Course Modules & Topics

Module Week One: Introductions and Framing

This module introduces the course, its place in the context of society and introduces Integral Theory that we will return to throughout this course and which forms a core pillar of Ubiquity's approach. By the end of the module, you should be able to describe the course in its societal context and explain different dimensions of leadership through Wilber's basic Integral model.

- Session 1: Course overview and context in program
- Session 2: The challenge of the times
- Integration task: Journal – what does leadership mean to you?
- Session 3: An Integral Approach
- Session 4: Leadership Theories
- Integration task: Quiz – The Integral Approach
- Forum Conversation Question: Why would an integral approach be relevant to leadership and strategy?

Module Week Two: What is Transformation?

This module goes deeply into change itself - what we really mean by change, and what the different components and variations are. In particular, we focus on transformational change. By the end of the module, you should be able to explain transformational change and its relationship to other types of change.

- Session 1: Natural life-cycles
- Session 2: Organizational Life-cycles
- Integration task: Journal – reflect on where you are on the life-cycles
- Session 3: Types of Change
- Session 4: Emergence
- Integration task: KWL Table – list what you now know, what you still want to know and what you have just learned about transformation
- Forum Conversation Question: What kind of change is your society going through?

Module Week Three: The Learning Organization

This module reviews the core components of what it takes to be a successful learning organization. It draws heavily on the internationally-acclaimed work of Peter Senge from MIT. By the end of the module, you should be able to describe the main features of a successful learning organization.

- Session 1: Systems Thinking
- Session 2: Personal Mastery
- Integration task: Journal – what does “personal mastery” mean to you?

- Session 3: Mental Models
- Session 4: Shared Vision and Team Learning
- Integration task: Quiz – five qualities of a learning organization
- Forum Conversation Question: How would you rank the five qualities in terms of importance? Justify your answer.

Module Week Four: Leadership for Sustainability

This module explores what it means to play a leadership role explicitly committed to ecological and social sustainability. By the end of the module you should be able to describe what differentiates leadership for sustainability.

Note – this session contains no video lectures so you are requested to review the articles and videos listed below.

- Session 1: Definitions: What is sustainability leadership?
 - Visser & Courtice – *Sustainability Leadership*
- Session 2: Characteristics of sustainability leaders
 - Visser – *CSR Leadership*
- Integration task 1: Journal: Who would you regard as a good sustainability leader, and why?
- Session 3: Actions of sustainability leaders
 - Video – *4 CEO Perspectives on Sustainability*
 - *Unilever webpage on sustainability*
 - *A new paradigm for sustainable growth* – Paul Polman interview
 - *Unilever Sustainable Living Plan: Two Years On*
- Session 4: The paradox of sustainability leadership: cases of Monsanto & BP
 - Visser – *The Age of Responsibility*
 - *Monsanto webpage on sustainability*
 - *Monsanto's CEO Says Play Fair* (video)
 - *Monsanto CEO Hugh Grant: Our Critics Are Fueled By 'Elitism'* – news article
 - *Growth through Global Sustainability* – interview with Monsanto CEO
 - *BP's webpage on sustainability*
 - *Drowning in Oil* video
 - *BP's Bob Dudley on Earning Back Trust and Building a Sustainable BP for the Future*
- Integration task 2: Journal: Which sustainability leaders today are in danger of losing their credibility?
- Forum Conversation Question: Why is Paul Polman of Unilever regarded as an exemplary sustainability leader? What makes him different to other business leaders?
- Suggested Self-Mastery Module: Personal Sustainability

Module Week Five: The Transforming Leader

This module goes into detail on the characteristics and core practices of a leader who can transform themselves and the world around them. By the end of it, you should be able to explain the main characteristics of transformational leaders.

- Session 1: Measuring leadership development
- Session 2: Stages of Leadership Development
- Integration task: Write a 300 word summary on how leaders develop
- Session 3: 3 Stages of Transformational Leadership
- Session 4: 15 Competencies of Advanced Leaders
- Integration task: Journal – assess yourself against the 15 competencies
- Forum Conversation Question: What kind of leadership is best suited to the world you see around you?

Module Week Six: Being and Becoming

This powerful module introduces you to some concepts and practices that enable you to connect to your inner ability for clarity, compassion and creativity. These qualities are key to navigating complex times. By the end of the module, you should be able to describe your relationship at any given moment to your sense of calm and freedom.

- Session 1: The Ground of Being – Concept and Practice
- Session 2: 5 Tenets and 4 Qualities for Evolutionary Leadership
- Integration task: Journal – what recognition and tensions do these ideas and practices bring up in you?
- Session 3: Physical vitality
- Session 4: Energy and resilience
- Integration task: Journal – make a list of lifestyle changes you commit to making in order to increase your personal vitality and resilience
- Forum Conversation Questions: How do you see the 5 Tenets and their shadows play out in your everyday life? Share tips and challenges on supporting your personal vitality and resilience.
- Self-Mastery: Contemplate the 5 Tenets every day for at least 15 minutes; Make the lifestyle changes you wrote in your journal and record how easy or difficult it was.

Creative Assignment: With 2-4 other students, invent a fantasy organization and create a promotional video of max 4 minutes demonstrating how it's a model of transformational leadership and governance.

Module Week Seven: Personal Effectiveness

This module equips you with tips and tools to be highly effective and productive in your work. How to manage your inbox, how to stay motivated and aligned, how to really get the things

done that matter. By the end of the module you should be able to relate personal effectiveness practices to your life and work.

- Session 1: Mapping personal effectiveness
- Session 2: Getting Things Done
- Integration task: Quiz – conditions for personal effectiveness
- **Session 3:** Zen to Done – Simple Productivity
- **Session 4:** Smart and Conscious
- Integration task: Journal – what will you change to boost your personal effectiveness?
- Forum Conversation Question: Share tips for increasing personal effectiveness.
- Self-Mastery: Implement the changes you listed in your journal to boost your personal effectiveness and record a reflection on the process.

Module Week Eight: Creating a Transformational Culture

This module focuses on how to develop the cultural dimension of transformational organizations. By the end of it, you should be able to describe core qualities and practices for a transformational culture.

- Session 1: Understanding Organizational Culture
- Session 2: Vision, Mission and Values
- Integration task: Create an Internal and External Vision and Mission for your dream organization
- Session 3: Culture as a Field of Relationships
- Session 4: You and the other
- Integration task: Journal – describe a situation where changing your own attitude changed a relationship
- Forum Conversation Question: How do you see culture influencing change around you?
- Self-Mastery: Identify a relationship you would like to improve with someone and by shifting your own perspective see if you can shift the relationship. Record the results.

Module Week Nine: Tools for Collaboration

This module introduces you to a number of approaches and tools for large-scale collaboration with groups. They are designed to bring out the highest possible potential in a group, using everyone's talents and insights. By the end of the module you should be able to select an appropriate method for large-scale collaboration.

- Session 1: Releasing Collaboration and Co-Creativity for Transformation
- Session 2: Open Space Technology
- Integration task: Write a 300 word opening introduction to an Open Space Technology session
- Session 3: Circle practice

- Session 4: World Cafe
- Integration task: Quiz – when to use which intervention?
- Forum Conversation Question: What have you experienced as the conditions needed for successful collaboration?

Module Week Ten: Levels of Organizational Development

This module explores the concept of levels in organizational development and in particular one example from Richard Barrett's Seven Levels of Organizational Consciousness. By the end of the module, you should be able to summarize the usefulness of mapping levels of development in organisations, and compare seven different levels of organizational awareness.

- Session 1: What are Levels of Organizational Development?
- Session 2: Mapping Levels of Development for Organizations
- Integration task: Quiz – Levels of Organizational Development
- Session 3: 7 Levels of Organizational Development – part one
- Session 4: 7 Levels of Organizational Development – part two
- Integration task: Journal – assess a community you are involved in on its levels of development
- Forum Conversation Question: What makes sense to you in this module and what are your questions?

Module Week Eleven: Organizational Development by Natural Design

In this module we look at what the most natural ways would be to design an organization. Letting ourselves be inspired by how things happen naturally, we can create structures and processes that facilitate natural life processes rather than get in the way of them. By the end of this module, you should be able to relate the principles and practices of natural design to an organizational context.

- Session 1: Natural Design
- Session 2: Organizational Fitness
- Integration task: Quiz – organizational fitness
- Session 3: Chaordic Design – principles
- Session 4: Chaordic Design –practice
- Integration task: Journal – do a quick assessment of the fitness of your local community based on the concepts presented
- Forum Conversation Question: What pros and cons do you see in the natural design approach

Module Week Twelve: Creating Agile Governance

This module looks at how to create governance practices that enable you to hold a long-term vision while steering the organization dynamically day-to-day, and integrating all the relevant

perspectives and information from your people. It is inspired by the holacracy practices. By the end of the module, you should be able to explain the core principles and practices of agile governance.

- Session 1: Principles of organizational agility
- Session 2: Designing for organizational agility
- Integration task: Journal – how agile would you say your current organization is? Why?
- Session 3: Practices for Dynamic Steering 1
- Session 4: Practices for Dynamic Steering 2
- Integration task: Quiz – dynamic steering
- Forum Conversation Question: What do you see as the benefits and pitfalls of adopting practices for an agile organization?

Module Week Thirteen: Frontiers of the Future

In this module we travel into the realm of possibilities that the very latest scientific research and leading-edge practices are pointing towards. Drawing on real-life experience of applying some of these approaches, this module opens our eyes to an incredible potential. By the end of the module, you should be able to summarize developments on the leading edge of large-scale energy work.

- Session 1: Energetic Architecture
- Session 2: Components of Energetic Fields
- Integration task: Quiz – energy fields
- Session 3: Systemic Energy Work
- Session 4: Co-creative Science
- Integration task: Journal – how are you relating to this material?
- Forum Conversation Question: What are the most leading-edge discoveries you are aware of that are relevant to leadership and strategy?

Module Week Fourteen: Review and Challenge

This module revisits the main topics of the course and locates them in the context of a broader vision and societal trends. It also issues a challenge to you. By the end of the module, you should be able to explain how this course relates to the challenges in your contexts and broader societal developments.

- Session 1: Course summary
- Session 2: Connecting the dots
- Integration task: Quiz – course highlights
- Session 3: The bigger perspective
- Session 4: The Challenge
- Integration task: Journal – what are the most important commitments you are making as a result of this course?

- Forum Conversation Question: What are the key insights you gained and what questions do you still hold?
- Self Development: Take the first step in implementing one of your commitments and record the results.

Mission Project Report: Report on how the experience you had in your Change Project relates to the content of this course. This may be created in any of the permitted media modalities.

General Course Materials

Barrett, R (1998). *Liberating the Corporate Soul*. Woburn MA, USA, Butterworth-Heinemann

Beck, Don E., & Cowan, Christopher C. (1996). *Spiral Dynamics: Mastering values, leadership and change*. Cambridge, MA: Blackwell

Brown, B (2011). *Conscious Leadership for Sustainability – a summary*.
http://integralthinkers.com/wp-content/uploads/Brown_2011_Conscious-Leadership-for-Sustainability_Short-Excerpt1.pdf

Doppelt, Bob (2010). *Leading change toward sustainability: A change-management guide for business, government and civil society* (2nd ed.). Sheffield: Greenleaf.

Edwards, Mark G. (2009). *Organizational transformation for sustainability: An integral metatheory*. London: Routledge.

Kotter, John P. (1995). Leading change: Why transformation efforts fail. *Harvard Business Review*, 73(2), 59.

Merry, P (2009). *Evolutionary Leadership*. Pacific Grove, Integral Publishers

Senge, P (2006). *The Fifth Discipline*. New York, Doubleday. Chapters 1-3.

Senge et al (2004). *Presence*. Cambridge USA, Society for Organizational Learning

Taegel, W (2010). *The Sacred Council of Your Wild Heart*. Wimberley, 2nd Tier Publishing

Torbert, W. R. (2003). *Personal and organizational transformations through action inquiry*. London: The Cromwell Press.

Torbert, W. R., Cook-Greuter, S. R., Fisher, D., Foldy, E., Gauthier, A., Keeley, J., et al. (2004). *Action inquiry: The secret of timely and transformational leadership*. San Francisco: Berrett-Koehler.

Wheatley, MJ (1999). *Leadership and the New Science*. San Francisco, Berrett-Koehler

Wilber, Ken (2000). *A theory of everything: An integral vision for business, politics, science, and spirituality*. Boston: Shambhala.

Wilber, Ken, Patten, Terry, Leonard, Adam, & Morelli, Marco (2008). *Integral life practice: A 21st century blueprint for physical health, emotional balance, mental clarity and spiritual awakening*. Boston: Integral Books.

Assessment and Grading

The final course grade will be calculated as follows:

1. The Creative Assignment during the course of the semester is the primary project for the entire course. This will be reviewed and graded by students, faculty members and TA's. This will count for 50% of your grade.
2. Weekly online participation in Integration Tasks and Group Discussion: There are a wide array of activities each week viewing videos, written essays, action-reflection learning, Forum interactions with other students, etc. The Moodle course system automatically records the visits of students and the quizzes, journal entries, Forum interactions, etc. This will count for 20% of your grade.
3. Multiple choice quizzes to check and help you develop your understanding of the material. This will count for 20% of your grade and be rewarded with badges and points.
4. A Mission Report at the end of the course linking your experience in your change project to the content of this course. This will count for 10% of your grade.

Student work will be evaluated for the following areas (note: *Students pursuing an A grade should do more than the minimum requirements; that is, do additional reading and view extra films as recommended in the course Schedule*).

1. Achieving the primary *objectives* of the course;
2. *General knowledge* of all required reading assignments and of all material presented by the instructor in lectures and from class discussions, films, and so on;
3. Clear, concise, reflective, critical *thinking*; and
4. Regular, active, and meaningful *participation* in class discussions of assigned readings in class and on the course website.

Grading Formula

Points	Grade
95+	A
90-94	A-
87-89	B+
84-86	B
80-83	B-
77-79	C+
74-76	C
70-73	C-
67-69	D+
64-66	D
60-63	D-
<59	F

ASSIGNMENTS		Points
Participation in regular activities and Integration tasks	All Weeks	20 points
Creative Assignment	Module 7-15	50 points
Quizzes	All Weeks	20 points
Mission Report	Module 14	10 points
TOTAL		100 Points