UNIVERSITY OF WISCONSIN - MADISON

Coordinated Leadership Initiative

Development of UW-Madison's Leadership Framework

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On Behalf of the Leadership Educators Council Planning Team

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Leadership Educators Council Planning Team
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COORDINATED LEADERSHIP INITIATIVE
Development of UW-Madison's Leadership Framework
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I.   Introduction

The University of Wisconsin – Madison has a rich history of developing engaged citizens in an ever changing global society. As leaders of major corporations, volunteers with the Peace Corps or Teach for America participants, graduates are applying what they've learned at UW-Madison to impact their world, reflecting the embodiment of the Wisconsin Idea. In order to maintain that tradition, and to prepare future generations of alumni, faculty and staff for these challenging responsibilities, it is critical that the University provide:

- A consistent campus-wide orientation to "Leadership" via an intentional Framework
- Accessible leadership opportunities that are aligned with the Leadership Framework
- A commitment to maintaining and adapting UW's Leadership Framework with changing times while holding true to the core values

Currently the University has no shared understanding of leadership. This can serve to disorient students, faculty and staff as they seek to learn what is and isn't "Leadership". By creating a shared, campus-wide leadership framework, the campus community can better understand and honor the Universities' unique values and institutional history. Additionally a shared leadership framework - including values, related competencies, and outcomes - can help to align and connect the various leadership development opportunities that already exist across campus. It can also help to shape and inform the development of new opportunities as future needs emerge. Finally it allows for a thorough analysis of current opportunities that highlight gaps and redundancies.   These steps will position us to build upon the impressive tradition of UW-Madison and allow for responsible stewardship of resources.

To address this issue, several campus departments are acting as champions of and have charted an initiative to support more intentional and coordinated leadership education. These include the Office of the Provost, the Division of Student Life, the Office of Human Resource Development (OHRD), and the Center for Leadership and Involvement (CfLI).

The initial stage of UW-Madison's Coordinated Leadership Initiative focused on the development of a theory and research-based Leadership Framework grounded in the values and history of our institution. The Framework, introduced in this document, was developed during the 2012-2013 academic year by a team of leadership educators and practitioners (see Appendix B). The Framework presents a working understanding of how to engage in the act of leadership – understood as the phenomenon of change in an individual, group or communities' beliefs, values or behaviors.

II.   Structure of Our Work and Tasks Completed

The charge of developing a campus-wide Leadership Framework on a large, decentralized campus posed significant challenges. Advocates of this initiative invested substantial time and energy into this process throughout the year, meeting bi-weekly for 90 minutes with significant preparation work outside of our scheduled meetings. There were many tasks completed and milestones met along the way that enabled the framework's development. Below we've identified some of the more significant accomplishments that resulted in our proposed Leadership Framework.

a. Institutional Support

In the summer of 2012 CfLI and OHRD approached the Dean of Students and Provost to gauge their interest and determine their level of support for this initiative. After gaining Executive Sponsorship from Dean Berquam and Provost Deluca, a brief overview of the initiative was shared with the Dean's Leadership Council in July 2012. This provided greater exposure to the initiative and helped us learn of any significant obstacles that may exist. With the support of our Executive Sponsors, the Leadership Educators Council (LEC) Planning Team Charter (see Appendix A) was developed and team membership was determined.

b. Leadership Educators Council (LEC) Planning Team

The LEC Planning Team (see Appendix B) was created to ensure broad campus-wide participation in the development of UW-Madison's Leadership Framework while maintaining a manageable group size for the team to be functional. The team was composed of leadership educators and practitioners who represent a cross section of campus. This team included members from the Associated Students of Madison, College of Engineering, College of Letters and Science, Division of Student Life, Office of Equity & Diversity, Office of Human Resource Development, School of Business, School of Education, School of Human Ecology, University Health Services, and Wisconsin Union. The Planning Team also included students (graduate and undergraduate), administrators and classroom instructors. The intent was to gather a team that had a wide variety of skills, identities and experiences that would enrich our work.

c. LEC Planning Team's Purpose & Goals

The Planning Team convened for the first time in early September at a half-day retreat to begin developing and committing to clear goals, timelines, and modes of assessment for the beginning stages of this initiative. During the retreat and in subsequent meetings the group adopted its charter and developed operating agreements that would enable the team to work productively. The Planning Team committed to a Calendar of Deliverables (see Appendix C) that focused our energy on producing a "Leadership Framework" by the end of June 2013.

d. Initiative Guiding Principles

Given the stated goal of creating a campus-wide Leadership Framework, the Planning Team was conscious of making sure that the project was conducted with integrity. The team developed a set of Guiding Principles that served to orient us as we developed the framework. As colleagues from across campus engaged with us in this work they could expect us to uphold these principles. After a series of discussions at Planning Team meetings the following principles were agreed to:

- **Inclusive**: Generating leadership development ideas through the active invitation and engagement of those at UW-Madison, in the community, and across the state.
- **Accessible**: Creating an open place and space for leadership ideas to be shared and amplified.
- **Decisive**: Moving leadership development ideas from concept to practice, which sustains leadership development by positively influencing students, staff and faculty.
- **Uniquely Wisconsin**: Capturing the essence of the Wisconsin Idea, honoring and respecting the culture that both precedes and follows the initiative.

These principles, developed by the Planning Team during this initial stage of Framework development, served as touchstones for our work together. They are also integrated into the framework and will guide our approach through future stages of the Initiative.

e. Framework Data Sources and Planning Team Sub-Groups

The first several Planning Team meetings were dedicated to conceptualizing how best to meet the stated goals of the charter. A framework development diagram (see Appendix D) emerged that included specific data sources that would inform the content of the Leadership Framework. During a planned Idea Session in October, Planning Team members identified specific content, pertinent questions and potential resources that related to each of the data sources. The four primary data sources identified were:

- **Research/Scholarship**: Ensured that the framework is tied to the academic field of study and aligned with the current, available and relevant research on leadership.
- **Leadership Programs**: Allowed framework to be informed by current programming's (both curricular and co-curricular) practical application of leadership development.
- **Institutional Values and Initiatives**: Determined how other University guiding documents (Essential Learning Outcomes, Wisconsin Idea, etc.) align or integrate with the Leadership Framework.
- **Outreach and Feedback**: Enacted a plan to inform shared governance groups of the initiative and gather feedback from campus and employers of UW-Madison alumni.

Members of the Planning Team were then divided into sub-groups to focus on one of the primary data sources. A set of tasks was developed and these sub-groups began to plan how to gather pertinent information that would ultimately inform the Framework's content.

f. Elements of the Leadership Framework

One of the essential tasks of the Planning Team during the fall semester was to determine the structure and potential content for the Leadership Framework. We reviewed framework examples from other institutions to learn what elements of a framework could entail. Initially the Planning Team settled on the following potential framework elements, or headings, for a campus-wide Leadership Framework:

- Definition(s)
- Philosophy
- Competencies
- Connection to Wisconsin
- Leadership Development
- Outcomes

Over time it became apparent that some of these elements overlapped or weren't as essential as others.

III.   Key Findings

According to *Leadership Brand* (Ulrich & Smallwood, 2007), 70% of leadership related competencies are similar regardless of the context in which leadership occurs. Ulrich asserts that the other 30% of competencies are the differentiators—the ones that make a difference and are unique to each organization.

Our proposed Leadership Framework includes the 70% of competencies that are not context-specific, but particularly addresses the unique 30% that applies specifically to the UW-Madison context.

a.   Framework Themes
In December 2012, sub-groups reported their initial findings based on their data source and consistent themes emerged. Each sub-group provided distinctive data along with elements that uncovered considerable overlap. Below are the key themes that emerged from each sub-group and how it impacted the proposed Leadership Framework.

i.   Research/Scholarship
One of the many contributions from this sub-group was the establishment of two principles that position the Framework. The first principle states that leadership is an action, not a position. The second principle clarifies that context matters when engaging in leadership, and that each situation may require a unique response to successfully navigate change.

The Framework's competencies were also supported by the information uncovered by this sub-group. Specifically, *self-awareness* and *decision making* were directly added to the Framework as a result of the research that was reviewed. In addition to the Framework being supported by existing leadership research, this sub-group also crafted a Leadership Development Delivery Model that will pay dividends as the next stages of this initiative unfold. Finally, engaging in reflection was cited as a critical practice in the development of leadership capacity.

ii.   Leadership Programs
The Leadership Programs sub-group reviewed existing programs on the UW-Madison campus and helped synthesize data from the Leadership Development Opportunities Inventory (a January 2012 survey of nearly 400 campus leadership programs). Their findings indicated that most programs do not operate from a specific definition of leadership and allow it to emerge from the group in their particular context. Similarly, this sub-group found that the language differed between programs, but many relied on similar concepts and models to inform their work. This led to redundant programming, challenging communications, and difficulties sharing resources and ideas, thus lending more justification for a unified Leadership Framework to support leadership development.

This sub-group also identified data that specifically supported the competencies of *interpersonal communication* and *moving ideas into action*. Similar to the findings of other sub-groups, the Leadership Programs sub-group's data also supported the two principles identified at the beginning of the Leadership Framework.

iii. Institutional Values and Initiatives

The Institutional Values and Initiatives sub-group reviewed several campus-wide documents to explore what ties they have to leadership. Considerable time and attention were given to guiding documents – including Essential Learning Outcomes, Wisconsin Experience, University Mission Statement, and the Wisconsin Idea as well as other historical documents.

The contributions of this sub-group, and the additional support of Gwen Drury who provided our Planning Team with a brief presentation on the Origins of the Wisconsin Idea, resulted in the Values element for our Framework. Themes of *integrity*, *inclusive engagement* and *connection and community* were consistently unearthed while this sub-group reviewed information. Those themes were further expanded, based on the findings from all sub-groups, into the Value statements within the Framework. The specific and unique origins of these Values serve as a key differentiator when engaging in leadership within the UW-Madison context.

iv. Outreach and Feedback

The Outreach and Feedback sub-group collected information to help support the Framework's development in two different ways. The sub-group surveyed a set of organizations that currently employ UW-Madison alumni to better understand how they understand leadership and if UW-Madison graduates are distinct in any specific way. Additionally, this sub-group engaged in two focus groups at separate conferences to learn how students, faculty and staff understand leadership.

Several consistent themes emerged that resulted in the competency of *supporting learning and development of others* and some of the specific outcomes related to integrity – including commit to working hard and continuous learning.

Given the significant overlap of themes in the data that was reviewed by each of the sub-groups, the process quickly turned to organizing and distilling the information into a more digestible form. Throughout the spring 2013 semester the Planning Team clustered and synthesized the data that had been collected.

b. Framework Elements Redefined

As each sub-group began to submit their key findings it became apparent that some of the Framework elements were more salient than others. The Planning Team decided not to focus on finding a common definition of or series of definitions for leadership based on the findings of the Leadership Programs sub-group. As a result, our proposed Framework does not include a Definition element as originally intended and is reflective of the institutional value of a more egalitarian approach to leadership rather than a top-down approach. The Values element, generated from the data supplied by the Institutional Values and Initiatives sub-group, served as an integration of the previous elements of Philosophy and Connection to Wisconsin. Finally, the Planning Team determined that the Leadership Development element should be more fully explored in later stages of this initiative. This resulted in the proposed Framework focused on the following elements:

- **Values**: A set of cultural beliefs or ideals that are consistent with our University's history and mission. They serve as a foundation for the leadership framework and help support the work of leadership development and leadership outcomes.

- **Competencies**: Skills, abilities, or knowledge sets that can be taught or developed. All competencies have indicators that allow them to be observed or measured.

- **Outcomes**: Detailed, specific, measurable or identifiable, and meaningful statements that are derived from competencies being enacted for the purposes of change.

The Framework includes an opening paragraph that helps to position the leadership related content by identifying two principles and a common understanding of leadership.

c. Purpose of Outcomes Matrix

The Planning Team continually kept the end users of the Leadership Framework in mind when developing the document's structure. Our goal was to provide a level of meaning for "leadership" without limiting the ability of leadership educators to apply the framework in their own local context. The Outcomes Matrix provides a unique outline of what outcomes can be generated when specific Leadership Competencies are enacted while living the Leadership Values. The list of outcomes isn't exhaustive but serves as a sample of outcomes when other elements of the framework are operationalized.

IV. Proposed UW-Madison Leadership Framework

This Framework is based on the principles that (1) leadership is an action oriented endeavor and not based on position or level of authority and that (2) context matters – each situation requires unique engagement. The Framework presents a working understanding of how to engage in the act of Leadership - understood as the phenomenon of change in an individual, group or communities' beliefs, values or behaviors.

Values

The Leadership Values are a set of cultural beliefs or ideals that are consistent with our University's history and mission. They serve as a foundation for the leadership framework and help to support the work of leadership development and leadership outcomes.

INTEGRITY

Transparency and truth are central touchstones for integrity. We strive for transparency of information and processes, because we believe openness and accessibility facilitate trust, particularly when there are diverse and divergent perspectives on an issue. We hold ourselves accountable to reach decisions through an ethical process and accept responsibility for acting in the interest of all stakeholders.

INCLUSIVE ENGAGEMENT

The heart of leadership is the art of inspiring active, informed engagement and decision making in the pursuit of the common good. Inclusive Engagement is the process by which we strive to seek and value the input of all, thereby realizing the benefit of the breadth of intelligence among us. At its core, Inclusive Engagement values the crucial knowledge and contributions of us all.

CONNECTION AND COMMUNITY

Leadership requires working *with* communities rather than working *on* communities by identifying, aligning, and pursuing goals that are mutually beneficial for all people impacted. With humility, we seek to foster active partnerships rather than imposing solutions.

Competencies

Leadership Competencies are skills, abilities, or knowledge sets that can be taught or developed. All competencies have indicators that allow them to be observed and measured.

SELF-AWARENESS

Consistent self-reflection helps to reveal strengths, limitations, beliefs, values and attitudes that generate engagement. A commitment to personal development provides greater understanding of multiple identities and experiences that affect the ability to facilitate change.

INTERPERSONAL COMMUNICATION

Develop essential relationships through listening, considering and responding to the needs of individuals and the situation. The ability to communicate in tactful, compassionate and sensitive ways enables these relationships to evolve.

SUPPORTING LEARNING AND DEVELOPMENT OF OTHERS

Develop capacity and engagement of individuals and groups through feedback and coaching.

DECISION MAKING

Make decisions that impact others and the organization in which the decisions are made. Employ critical and strategic thinking that enable creative solutions to be considered and pursued. With important systemic dimensions in mind, analysis and ideas from multiple sources give way to implementation and evaluation.

FOSTERING DELIBERATION AND BRIDGE-BUILDING

Through cooperative participation, encourage everyone to take ownership of the work that is being done and the outcomes that are created. By creating an environment where differences are appreciated, conflict can serve to expose new solutions to complex problems.

HONORING CONTEXT AND CULTURE

Seek to understand the organization, culture, system, politics, and dynamics and their impact on actions needed to achieve the group's goals.

MOVING IDEAS INTO ACTION

Offer a compelling vision that inspires groups to engage in the ambiguous transformation process. Co-creation processes focused on common goals require steady, yet flexible, interventions based on evaluation and the needs of the group.

Outcomes

Leadership Outcomes are detailed, specific, measureable or identifiable, and meaningful statements that are derived from competencies being enacted for the purposes of change in an individual, group or communities' beliefs, values or behaviors.   The Leadership Outcomes Matrix outlines what outcomes can be generated when specific Leadership Competencies are executed while living the Leadership Values. This matrix primarily focuses on individual-level behavioral practices and is not intended to serve as an exhaustive list.

	Integrity	**Inclusive Engagement**	**Connection and Community**
Self-Awareness	• Create processes for open communication and dialogue • Value fact-based information • Ensure transparency for the scrutiny of all the group's stakeholders • Maintain focus on truth over achievement • Think, feel, and behave with consistency, genuineness, authenticity, and honesty towards others • Understand personal motivations to serve and how it relates to the collective effort • Commit to working hard and continuous learning • Understand one's own culture and context and how it impacts participation	• Reflect on personal beliefs, values, attitudes, and emotions that motivate one to take action • Create structures that provide opportunities for feedback and reflection • Appreciate the knowledge, talents and contributions of those in the community • Recognize the value of broad community participation in creating change • Understand own strengths and limitations • Engage others who complement group and individual limitations	• Evaluate and be attentive to the degree of participation among group members • Demonstrate humility • Ensure each member is part of goal attainment • Share ownership in the work and results of the group's efforts • Build awareness of one's impact on the dynamics and needs of the group
Interpersonal Communication	• Encourage open and honest communication • Appropriately address anxiety and conflict • Model vulnerability by actively disclosing information that benefits the group	• Engage various individual and group communication strategies to draw out participation of others • Appropriately engage and support others in all stages of the process • Listen to individual perspectives and ensure they are reflected in group outcomes • Adapt approach in order to be responsive to the needs of others	• Develop trust with others in the group • Cultivate a network of peers and colleagues in diverse communities • Mediate conflict to further the group's mission • Openly acknowledge and appreciate the contributions of others

	Integrity	Inclusive Engagement	Connection and Community
Supporting Learning and Development of Others	• Lead by example to help others be authentic contributors • Provide and receive feedback for the purposes of continued learning • Support others to take risks that allows new information and perspectives to emerge	• Assess the goals, needs, aspirations of others to support growth and development • Encourage and support the participation of others in the co-creation of their community • Facilitate the learning of others by delegating work that extends current knowledge or experience • Partner in peer-to-peer learning • Provide direction to resources that support others' growth	• Engage others in community work to expand their network of peers and colleagues • Trust others to represent the group in community forums • Develop group facilitation knowledge in others
Decision Making	• Lead decision making processes with transparent criteria and goals • Help group become comfortable with making a decision without full information or agreement • Help group stay focused on the common goal • Acknowledge own self-interest and ensure it doesn't interfere with decision making process • Engage affected communities in decision making that impacts them • Exhibit personal accountability for decisions made • Demonstrate the flexibility to recognize when a decision needs to be revisited	• Create processes where all perspectives are invited and freely shared • Recognize "groupthink" and encourage alternatives • Encourage consensus building through constructive dialogue • Elicit ideas from all participants • Synthesize divergent perspectives to help move towards a final decision	• Recognize group dynamics and its effect on community • Promote collaboration within groups and with external participants • Model humility and trust for the rest of the group

	Integrity	**Inclusive Engagement**	**Connection and Community**
Fostering Deliberation and Bridge-Building	• Openly acknowledge group dynamics • Foster a culture of transparency • Value input from team members, even when it is different from others and your own • Foster a sense of trust among team members	• Recognize the importance of sharing ownership in completing critical group tasks • Identify how others want to be appreciated for their participation to support ongoing and future engagement • Identify complementary skills and ensure that teams are diverse • Reserve judgment • Ensure that the dominant groups are not overpowering	• Build consensus with the group in identifying the group's goals • Create a safe environment where participants can share differences of opinion • Appreciate the different learning styles of group members • Foster a sense of trust among community partners • Develop coalitions by aligning mutually beneficial goals
Honoring Context and Culture	• Understand the culture and context in which the group exists • Help the group both recognize the value and challenges of cultural differences • Acknowledge the impact of systemic racism, sexism, ableism, etc., on goals and activities	• Encourage full participation of all members by identifying and removing barriers • Ability to challenge what is culturally dominant or normative for the group or institution	• Identify goals that are meaningful to all • Promote trust and good will across different cultures • Demonstrate knowledge of history and cultural context of each constituency
Moving Ideas Into Action	• Recognize the inherent risk in promoting change • Appropriately manage risk • Challenge the status quo with facts and logical reasoning about its advantages and drawbacks • Demonstrate flexibility in responding to the different ways in which others are impacted by change • Explore how intended change will be sustained and supported	• Promote energy and optimism in order to move ideas into action • Create a safe environment for people to be open in expressing and working through their fears of change • Collectively define and communicate a compelling vision that enables others to pursue change	• Partner with key stakeholders in identification, development and implementation of positive change • Maintain an open atmosphere for questioning processes and impacts • Work with the community in determining where change is needed

Development of UW-Madison's Leadership Framework

V.   Benefits of Framework

UW-Madison's Leadership Framework is intended to be structured and descriptive without being overly constraining or prescriptive. It can serve as a resource and model for creating new and aligning existing programs, academic courses, trainings and workshops in developing leadership capacity. The Planning Team paid specific attention to the existing research and theory on leadership that will allow for a deeper institutional commitment to tying leadership development opportunities to the academic discipline of leadership. In addition to the benefits at a local level for leadership educators of students, faculty and staff, the Leadership Framework will also provide critical institutional benefits, including:

- Providing clear Leadership Outcomes that can serve the institution in campus-wide assessments and assist in the accreditation processes.

- Generating evidence that enables the institution to clearly and powerfully articulate how we develop student leaders to potential employers.

- Allowing for a more complete understanding of what leadership development opportunities make UW-Madison graduates, faculty and staff effective and unique.

- Increasing efficiency by reducing redundancies and addressing gaps in leadership programming without compromising quality.

VI.   Next Steps

The development of the Leadership Framework serves as a first and essential step in coordinating leadership efforts at UW-Madison. There are several additional stages in the Coordinated Leadership Initiative that will enable the Leadership Framework to have its intended impact. Below we've highlighted our proposed next steps in this initiative.

a. Launch Coordinated Leadership Initiative Website
The website – leadership.wisc.edu – will serve as a primary resource to learn about the Coordinated Leadership Initiative, review the Leadership Framework, and find ways to get involved. The website will be launched by the beginning of the fall semester. Leadership.wisc.edu will also include opportunities to provide feedback on our work – further enabling us to meet the critical guiding principles of inclusive and accessible that we've articulated.

b. Complete Leadership Framework Vetting and Implementation Plan
The thorough and detailed work that resulted in the proposed Leadership Framework will be further strengthened by engaging in a deeper feedback and vetting process from an even broader group of diverse stakeholders from across campus. In July 2013 the Leadership Framework will be widely shared at a meeting intended to gather feedback on its clarity and portability. Invitations will be sent to approximately 70 leadership education proponents from different schools, colleges and administrative units.

The meeting will also serve as an opportunity to further develop and connect a committed core of localized champions of leadership education who will work to integrate the framework into their work during the fall 2013 semester. These local champions will work independently and collaboratively to inform other colleagues of the Leadership Framework, gather focused feedback on its clarity and portability and begin considering how it may be applied in their contexts. The feedback generated by these efforts will then be reviewed and any necessary adjustments will be made to the Framework by the end of October 2013. At that point, UW-Madison's Leadership Framework will be ready to serve as an institutional resource for leadership education.

One example of a campus-wide program that will be adjusted based on the Leadership Framework is the Leadership Certificate program. The Framework will serve as the new foundation for the Program. This non-academic Certificate program, founded in 2002, is administered by the Center for Leadership and Involvement. The Leadership Certificate program has seen significant growth in the last several years and will now benefit from the clear, specific outcomes that are a key component of the Leadership Framework.

c. Assess the Alignment of Current Leadership Opportunities Related to Framework

Once the Leadership Framework has been finalized in the fall 2013 semester the focus will shift to mapping existing leadership development opportunities offered on campus to the Framework. We will analyze whether current leadership related programming and course offerings align with the newly formed Framework. Based on the data collected, units across campus will be better positioned to make informed decisions on how to align their efforts to the framework and how resources should be allocated to support intentional leadership development more comprehensively and consistently across campus.

Ultimately we envision an interactive, personalized, online assessment tool that allows for users to be matched with appropriate leadership development opportunities based on their current level of development and areas of personal interest and need. This enables the UW campus community to efficiently and intentionally connect with opportunities that have the most value.

d. Generate Resources to Support Leadership Development Best Practices

As the demand for leadership education continues to increase it will be important that the current tools and resources that exist are widely shared. To help support these efforts a Leadership Educators' community of practice will be developed. This will provide leadership education practitioners the opportunity to convene and share best practices and learn from one another, and collaborate across units to maximize their resources.

Over time a robust suite of online resources will be developed and linked to the Framework's Outcomes Matrix. This will enable the Leadership Framework to serve in a more dynamic and user friendly fashion to grow and evolve with our rapidly changing global environment.

VII. Conclusion

With the submission of the Leadership Framework, the Coordinated Leadership Initiative has taken a critical step forward. The University of Wisconsin-Madison will have a clearly articulated and usable Framework to help shape leadership education. This Framework will serve as a critical component in ensuring that the institution's great tradition of developing agents of change will continue.

UW-Madison's Coordinated Leadership Initiative
Leadership Educators Council Planning Team
September 2012

Project Name	Coordinated Leadership Development Initiative – Planning Team
Project Coordinator(s)	Mark Kueppers, Center for Leadership & Involvement Jim Gray, Office of Human Resource Development
Planning Team Representation	College of Engineering, College of Letters and Science, Division of Student Life, Office of Equity & Diversity, Office of Human Resource Development, School of Business, School of Education, School of Human Ecology, Students, University Health Services, Women in Science and Engineering Leadership Institute, Wisconsin Union
Executive Sponsors	Provost and Division of Student Life

Project Description

The Leadership Educators Council (LEC) Planning Team will create a plan for generating campus-wide participation in developing a vision for leadership education and training at UW-Madison. This small subset of leadership development stakeholders (8-10 individuals) will determine how to create a shared "Leadership" framework that includes related competencies and learning outcomes that are research-based. These efforts will allow the University to commit fully to providing intentional leadership development opportunities for all undergraduate and graduate students, faculty and staff.

One of the primary objectives of this group will be to develop a clear purpose, goals, timelines, and modes of assessment for the larger LEC. The result of the coordinated initiative will include an intentional campus-wide leadership framework, programs and coursework that connect to the framework and a comprehensive assessment plan that illustrates the impact of leadership development at UW-Madison. This initiative will support the institution in making informed decisions to address gaps, reduce unneeded redundancies and provide infrastructure for efficiently navigating accreditation processes. Such assistance is critical in this challenging economic environment.

Project Definition

Functional Goals **Phase I**	1. Ensure students, faculty and staff are involved and that their needs are addressed by providing access and transparency (via websites, listening sessions, etc.). 2. Determine how other University frameworks (Essential Learning Outcomes, Wisconsin Experience, WI Idea, etc.) align with or can be integrated with the coordinated leadership framework. 3. Consider what leadership related research should be infused in our work.
Phase II	4. Create framework that may include a definition, principles, competencies and/or outcomes associated with leadership development. 5. Determine a plan for vetting framework and receiving campus-wide feedback.
Phase III	6. Develop a plan for initiating LEC and determine the scope of that groups' work. 7. Determine how the leadership framework's impact will be assessed (short, mid and long term for all impacted constituencies). 8. Create a long-term roll-out strategy for the campus' leadership framework.

Scope & Stakeholders	The initial stages of this project will include participation by faculty, staff and students (graduate and undergraduate) that span various academic disciplines (School of Business, College of Engineering, etc.), social identities (gender, race, etc.) and roles on UW-Madison's campus (supporting student services, academics, etc.). As this initiative expands into the LEC the scope will increase – ensuring that perspectives, input, buy-in and implementation is successful campus-wide. That will require participation from aspects of student life (Division of Student Life, Housing, Athletics, Greek Life, WI Union, FIGs, URS, Undergraduate Research Symposium, the Honors Program and Student Organizations), academic schools/colleges (including career service departments), administrative campus units (Academic Planning and Analysis, OHRD, Admissions, OED, DoIT, UHS) and other critical UW-Madison stakeholders (WAA, UW Foundation).
Challenges	• Ability to create a campus-wide buy-in amongst campus department and schools/colleges to pursue a coordinated leadership experience. • Ability to involve faculty in this process. • Ability to communicate with stakeholders and providing a timely feedback loop. • Ability of team members to fully participate and commit to a fast paced timeline. • Ability to maintain the balance between being process and outcome oriented. • Ability to develop consensus around campus priorities and implementation responsibilities. • Ability to develop a meaningful mode of assessment for these efforts. • Ability to secure financial resources and the ongoing commitment of stakeholders to the success of the initiative.

Data Sources

- Essential Learning Outcomes, Wisconsin Idea, Wisconsin Experience
- Leadership Development Opportunities Inventory data
- Leadership and Human Development Theory and Research
- Pathway to Coordinated Leadership Efforts proposal (Draft) – See Appendix
- Washington University in St. Louis – Leadership Initiative documents
- 2009 Multi-institutional Study of Leadership, UW-Madison School Report
- Benchmarking of Peer Institutions on Leadership Development coordination
- University of Arizona data and competencies

Deliverables

- Action plan (including timelines, roles and outcomes) for development of a leadership framework
- Campus-wide Leadership Framework (research based and relates to other UW frameworks)
- Short, Mid, and Long Term Plan for Coordinating Leadership Development on campus
  - Practical implementation of Leadership Framework
  - Assessment of impact of Leadership Framework
- Report of results from Leadership Development Opportunities Inventory (environmental scan)
- Recommendations for how LEC should be initiated and managed
- Outline of a sustainable structure for managing and increasing adoption of Leadership Framework
- Menu of options for how Framework will be enacted at campus, school and department level (Phase III)

Work Plan
• LEC Planning Team Kick Off – Half Day in Early September
• LEC Planning Team Meetings: Every other week through December for 1.5 hours
o Monthly Meetings through June '13
• Project Coordinators: Meet every other week with Facilitator to help plan meetings
• September: Begin every other week meeting schedule
o Determine components of Leadership Framework
• October/November
o Gather feedback from students & faculty on potential content for Framework components
o Research related campus frameworks and leadership theory to inform Framework
o Gather feedback from peer institutions on coordinated leadership development
• December: Begin crafting Framework & develop plan for campus-wide vetting
• Spring 2013
o Incorporate campus feedback into Framework & determine assessment plan
o Prepare for initiation of LEC & determine the scope of that group's work
o Launch LEC with clear objectives and deliverables

Internal Communications Plan
The Planning Team will communicate via email listserv. Meeting frequency will be determined based on the work plan above. Goals, objectives, timelines, progress and next steps will be addressed in meetings, via the email listserv and by creating a dedicated website for this initiative. Separate working teams may be formed to directly focus on various aspects of this plan. Those working teams will determine their own meeting frequency and communication plan based on workload and team makeup.

Roles and Responsibilities	
Project Coordinators Mark Kueppers (CfLI) Jim Gray (OHRD)	Develop a team charter statement. Create agendas for team meetings in consultation with facilitator. Assure key discussion, decisions and next steps are documented. Engage campus community members beyond the Planning Team as needed to assist in meeting the objectives of the team. Champion work of the team.
Facilitator Bruce Harville (OQI)	Contribute ideas for committee charter and agendas. Strategize how to best meet the goals and objectives of the group by using appropriate processes. Help to ensure an inclusive and transparent environment. Meet continuously with Project Coordinators to plan meetings and help Planning Team stay on task.
Planning Team Members Chris Carlson-Dakes (Engineering) Don Schutt (OHRD) Farah Shirzadi (Student) Geoffrey Thompson (L &S) Heidi Lang (Wisconsin Union) Jeff Hamm (School of Education), Loren Kuzuhara (Business) Margaret Nellis (SOHE, UHS) Nancy Mitchell (Education) Will Clifton (OED)	Planning Team Members will consistently attend meetings and provide critical input into this process. They will also consider how the various decisions that are made by the Planning Team will impact constituencies that they work with or know about. Planning Team Members will also occasionally work on various priorities associated with the Planning Team outside of meeting times. Champion the work of the team.

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Additional Contributions (Fall 2012): Geoff Thompson, College of Letters and Science; James Gray, OQI;
Will Clifton, Office for Equity and Diversity

Appendix C- Coordinated Leadership Initiative - Leadership Educators Council Planning Team Calendar of Deliverables

Revised: April 9, 2013

September 2012:   Planning Team Kickoff
Welcome and introduction of team members
Charter reviewed and shared elements of work/approach discussed
Operating agreement developed

October 2012:   Scope of Planning Team work defined
Key elements of work, along with key inputs, outputs, and deliverables identified
Sub-groups formed to address elements of Leadership Framework

November 2012:   Sub-groups report on progress and identify tasks for team members
Initiative Guiding Principles developed
Meeting with Sponsor (Dean of Students)

December 2012:   Sub-groups determine action plans and see which framework elements are most relevant to their sub-group

January 2013:   Submit initial copies of Data Collection forms to Mark
Sub-groups report initial data collection results on Framework elements to Planning Team

February 2013:   Sub-groups submit final copies of Data Collection forms to Mark
Sub-groups synthesize data on Framework elements & present to Planning Team

March 2013:   Develop key Leadership Value Statements based on sub-group data
Begin development of Leadership Website

April 2013:   Finalize Value Statements and develop related Leadership Competencies
Sub-groups formed to research outcomes related to competencies
Launch Website
Meeting with Sponsor (Dean of Students)

May 2013:   Sub-groups report on outcomes and Planning Team provides feedback
Initial draft of Leadership Values, Competencies and Outcomes are finalized
Planning Team determines if additional elements are needed in Framework

June 2013:   Initial draft of Report of Findings, including first draft of Framework is completed
Initial Report and Framework submitted to Executive Sponsors

Early Fall 2013:   Begin gathering campus feedback on Report of Findings and draft of Framework
Develop Framework implementation plan (Leadership Educators Council)
Meeting with Sponsor (Dean of Students)

Late Fall 2013:   Final draft of Report of Findings & Framework is completed reflecting campus input
Finalize plan for Leadership Educators Council (LEC) that includes:
- Scope of group's work and participants
- Clear objectives and deliverables
- How group will be initiated and managed
- Recommendations on how framework can be applied
- How framework will be assessed

Vetted Report and Framework submitted to Executive Sponsors
Finalized plan for LEC is shared with Executive Sponsors

Appendix D - Leadership Framework Diagram

Data Sources

Research/Scholarship · Leadership Programs · Outreach and Feedback · Institutional Values and Initiatives

Team Operations

Team Charter

Team Operating Agreement (Internal)

Initiative Guiding Principles (External)

Framework
- Definitions
- Philosophy
- Competencies
- Connection to Wisconsin
- Leadership Development
- Outcomes

Application

Benefits
- Team Members
- Institution
- Schools & Colleges

Development of UW-Madison's Leadership Framework