



**IOBTC 2016 at
University of Winchester
July 8th – 9th, 2016**

1) Title of Proposal:

Archiving elevated aspirations: The *Living Document* as an archival tool facilitating deeper and lasting learning.

2) Abstract:

Every faculty member has at some point or another questioned what it means to say their students have “learned”. In addressing this fundamental question I developed a process of personal, integrated and longitudinal learning that focuses on data generated insights with planned interventions for personal development. The archive of this process, pulling it all together is the *Living Document*. This session will focus on the document, its history and usage and ways other faculty members might utilize or adopt it. In this session, the very critical underlying philosophies and decisions we make to infuse and raise aspirations will be explored.

3) Keywords:

Action and Aspiration
Data Generated Insights
The *Living Document*

4) Format

- Activity or exercise*
 General discussion session*

*There will be elements of both – if you need one or the other I would say “General discussion session” for a shorter session and “Activity” for a longer session.

5) Time Requested:

- 20 Minutes
 30 Minutes*
 60 Minutes

*As in format I can vary the design to fit the time allotted. It depends on availability of time slots.

6) Planning Details:

No special requirements. Computer/projection (though I will have my laptop with me for backup).

Flip chart if possible but not essential.

7) Learning Objectives or Goals for the Session:

Uncover common and unique concerns around the most fundamental question of retained student learning

Share approaches that have led to increased aspiration and ownership of the learning process among our students

Introduce the *Living Document* as an approach that archives personal development with strong personal outcomes for the student.

8) Management or Teaching Topics:

What faculty member has not asked themselves the fundamental question – at the end of our “course” have students really changed? When they leave to what extent will they think differently and even more importantly will they behave differently? What will they remember or retain 6 months or 6 years after the course ends? In what ways will they manage or lead more effectively? Like my colleagues attending IOBTC I have asked those very questions throughout my career and have had the opportunity to interact with OBTC attendees around similar questions at numerous meetings.

Fifteen (15) years ago I decided to address those questions in a more direct fashion, taking the opportunity to design a process that would risk loosening controls over the learning environment, turning students into the architects of their owned journeys of learning. The theoretical underpinnings have drawn from many academic schools of thought, but certainly include action learning (Revans, 1980; Watkins & Marsick, 1992; Eikeland, 2012), evidence based teaching (Pring and Thomas, 2004), practice-based learning (Strati, 2007), situated cognition (Koole & Veenstra, 2015) and adult learning (Knowles et al., 2014). Drawing from these theoretical foundations, the approach is positioned to be *personal, integrated and longitudinal*. It is personal to the learner (not some case character), integrated to real life challenges for action outside the classroom, and longitudinal in that action, feedback and redesign of interventions are expected and central to the learning process. As such, the learning grabs affect and behavior as targeted and critical outcomes beyond cognitive learning approaches so tied to purely lecture and case analytic approaches. It falls in line with the tenets of experiential learning (cf., Kolb, 2014; Kolb and Kolb, 2005) that posits that all learning is re-learning, holistic to and interaction with the real world and an ongoing process including self-direction.

Central to this process of personal development and growth that I have designed is what has come to be known as *The Living Document (LD)*, a vehicle that would become the repository of activities, designed interventions and action and reflections. As I have designed this process, every component feeds into and helps inform other components. Students are expected to complete multiple forms of data generation to infuse data-driven insights. For each of these data generation vehicles there are Interim Deliverables, collected over time. In capturing the real world as a learning venue, students utilize planned Real World Interventions (RWI's) to enact behavioral improvement in areas that they already function. As a practical matter the *Living Document* was developed for convenience – someplace to store the myriad activities. What became clear very quickly was the fact that the LD could be quite powerful if it was viewed as an overall document, designed to capture the integrated activity and actions and growth of the student. It has been used as this vehicle in time frames from 6 weeks to 2.5 years. It has been used with Executive MBA's, in Executive Education

and with undergraduates. After 15 + years some 1000 “students” have utilized this approach and the *Living Document* with remarkable positive outcomes.

A condensed and abridged Guide to a Living Document is presented in Section 14 and additional outcome measures will be available and presented at the conference. Length of a document certainly never can be equated with quality but it is interesting to note that I provide a “Guide” for undergraduates (but without length restriction) of what a 15 page LD might look like – the highest modal category of papers turned in exceed 25 pages. In a similar vein, the “Guide” for EMBA students is in the 15-21 page range and the highest modal category of papers exceed 33 pages. In venues exceeding one year of intervention activity the modal length exceeds 60 pages. I do believe this comments on investment and ownership of learning.

9) Session Description and Plan:

Introduction: an introductory personal statement and goals of the session (1-2 minutes)*

Brainstorming (10-15 minutes) I will use a group based brainstorming approach to a) identify and share concerns about both the level of student aspiration and how our designs might inhibit both aspiration and the extent that real behavior change occurs, and b) identify methods that faculty have used to overcome these drags and barriers to higher aspiration and behavior change.

Introduction of and Details on Implementing *The Living Document* (10-15 minutes). This segment will involve providing an overview and Guides and materials related to my use of the *Living Document* and insights around how to implement it. Student feedback on its efficacy to support deeper learning will be provided.

Conclusion (1-2 minutes)*

- I am comfortable designing this session in any of the time slots you have identified and might need to fill – some of the design features would be lengthened or shortened depending on that slotting.

10) For Activities and Exercises:

I will bring multiple guides for data collection and real world interventions and the *Living Document*.

11) Implications for Teaching or for Teachers:

I will provide a vehicle, the *Living Document*, that has been developed and utilized over a long period of time and with multiple audiences, that is embraced and utilized by students with enthusiasm and effectiveness. It is an interesting vehicle because at first it is viewed with a great deal of trepidation (always the case) but by the end of the process is accepted with pride and accomplishment. Faculty who might choose this approach would have access to the Guides that are flexible and adaptable to any action based learning approach. The overall Guides and process are faculty designed – I use an analogy of driving a bus up to the curb that I provide. The actual journey is student designed – they develop the plans, the interventions and the routes they will take.

12) Application to Conference Theme:

In OB we frequently talk of the differences between extrinsically generated motivation to perform versus intrinsically generated motivation. I liken intrinsic motivation to the potential for elevated and vigorously pursued aspirations. The whole focus of the approach I describe and is nested within the *Living Document* is toward higher aspirational learning.

13) Unique Contribution to IOBTC:

I have never presented the *Living Document* elsewhere and it is wholly consistent with the theme of IOBTC,

14) References and/or Additional Materials:

Eikeland, O. (2012). Action research: applied research, intervention research, collaborative research, practitioner research, or praxis research? *International Journal of Action Research* 8(1), 9-44.

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Kolb, D. A. (2014). *Experiential learning: Experience as the source of learning and development*. Pearson Education.

Kolb, A. Y. & Kolb, D.A. (2005) Learning styles and learning spaces: Enhancing experiential learning in higher education. *Academy of Management Learning and Education* 4(2), 193-212.

Koole, S. L., & Veenstra, L. (2015). Does Emotion Regulation Occur Only Inside People's Heads? Toward a Situated Cognition Analysis of Emotion-Regulatory Dynamics. *Psychological Inquiry*, 26(1), 61-68.

Pring, R., & Thomas, G. (2004). *Evidence-based practice in education*. McGraw-Hill Education (UK).

Revans, R. W. (1980). *Action learning: New techniques for management*. Blond and Briggs Ltd..

Strati, A. (2007). Sensible knowledge and practice-based learning. *Management Learning*, 38(1), 61-77.

Watkins, K. E., & Marsick, V. J. (1992). Towards a theory of informal and incidental learning in organizations*. *International journal of lifelong education*, 11(4), 287-300.

Guide for Creating the Final Living Document

EMBA – June 2015

***Note: Abridged for IOBTC – this example is for an Executive MBA forum**

WHAT IS THE DOCUMENT?

THE *LIVING DOCUMENT (LD)* IS A SUMMARY DOCUMENT REPRESENTING YOUR EFFORTS TO GENERATE DATA-BASED INSIGHT AND ENERGETICALLY PURSUED, AND ENHANCED SKILL DEVELOPMENT. IT HAS GROWN AND WILL GROW OVER TIME AS YOU ENGAGE(D) IN THESE EFFORTS. ALONG THE WAY THERE ARE A NUMBER OF ACTIVITIES OF DATA COLLECTION, PLANNING AND INTERVENTION THAT ARE ACCOMPLISHED. YOU HAVE ALREADY SUBMITTED LD1, ESSENTIALLY REPRESENTING THE DATA COLLECTION/INSIGHT/TARGETING PHASES. IT IS NOW TIME TO TURN ATTENTION TOWARD THE “FINAL” LD. THIS WILL BE GRADED BASED ON THE QUALITY OF *INTEGRATION* AND INSIGHTS AROUND YOUR DATA COLLECTION, A THOROUGH UNDERSTANDING OF THE CONCEPTS THAT WE READ AND TALKED ABOUT, QUALITY OF WRITING, AND *CREATIVE AND OWNED PURSUIT OF PLANNED SKILL DEVELOPMENT*. IT IS NOT GRADED BASED ON “SUCCESS” IN THE INTERVENTIONS BECAUSE YOU HAVE BEEN ENCOURAGED TO DO SOMETHING MEANINGFUL IN TERMS OF INTERVENTIONS AND THIS CAN “STRETCH” AND CHALLENGE YOU. SUCCESS CAN BE SOMEWHAT MESSY BUT STILL POTENTIALLY REWARDING OF YOUR EFFORTS. EVEN THOUGH GRADED, THIS DOCUMENT IS YOURS. IN THAT REGARD I AM PRESENTING A GUIDE THAT WOULD “ILLUSTRATE” WHAT A 15-20 PAGE , DOUBLE- SPACED DOCUMENT MIGHT LOOK LIKE, NOT TO DELIMIT YOUR EFFORTS. ALWAYS REMEMBER THAT THERE HAVE BEEN TWO (2) MAJOR PARTS OF THE PROCESS:

- A) DATA COLLECTION AND INSIGHT
- B) PLANNING, INTERVENTION DESIGN AND IMPLEMENTATION, AND EVALUATION – WHAT IS REFERRED TO IN SOME EXAMPLE PAPERS AS PLAN, DO, REVIEW (EVALUATE)

HOW TO “VIEW” THE LIVING DOCUMENT?

IF YOU VIEW THE LD AS A 15-20 PAGE MANUSCRIPT IT MIGHT BE VIEWED IN A 5-7/5-7/5-7 WAY. THIS IS SIMPLISTIC OF COURSE BUT IT SERVES TO CREATE AN OVERALL VIEW. IN THIS VIEW THE FIRST 5-7 PAGES INTRODUCE THE DOCUMENT AND SUMMARIZE YOUR DATA COLLECTION ACTIVITIES (E.G., PAMS, INTERVIEWS, PERSONAL CULTURE AND HISTORY, INDIVIDUAL SKILL ASSESSMENTS). THIS 5-7 PAGES DOES NOT INCLUDE ANY EXHIBITS OR TABLES THAT YOU FIND USEFUL TO PRESENT. OBVIOUSLY OUT OF DATA COLLECTION SHOULD BE SOME INFORMED INSIGHT ABOUT STRENGTHS AND DEVELOPMENTAL NEEDS.

[I MIGHT MAKE A NOTE HERE ON TIMING – IN A PERFECT WORLD, DEVELOPMENT AND BEHAVIORAL CHANGE MIGHT BE LINEAR. WE MIGHT GENERATE DATA, FORM INSIGHTS, TARGET SKILL DEVELOPMENT, CREATE PLANS AND IMPLEMENT THOSE PLANS TO DEVELOP. THAT BEING SAID, REAL LIFE INSISTS ON HAPPENING THE WAY IT CHOOSES TO HAPPEN – MANY TIMES WITH TWISTS AND TURNS THAT HAVE TO BE ADAPTED TO. DURING OUR TIME TOGETHER WE ARE OPERATING IN A TIME FRAME WHERE SOME ACTIVITIES HAVE OCCURRED IN SIMULTANEOUS EXECUTION, NOT IN LINEAR FASHION. SOME OF YOU MAY HAVE AUGMENTED ORIGINAL DATA COLLECTION WITH FOLLOW-UPS OF SOME SORT THAT NEED TO BE INTEGRATED AND REPRESENTED IN THE FINAL LD. THIS IS FINE BECAUSE TARGETING SKILLS FOR DEVELOPMENT HAS ALWAYS BEEN PRESENTED AS A FUNCTION OF *NOT ONLY DATA, BUT PERSONAL CHOICE AND OPPORTUNITY.*]

THE REMAINDER OF YOUR MANUSCRIPT (5-7+5-7) CAN BE DEVOTED TO YOUR REAL WORLD INTERVENTIONS AND CONCLUSIONS. SINCE THERE IS A SEPARATE GUIDE FOR THESE I WILL NOT REPEAT IT HERE BUT CLEARLY THERE ARE *PLANNING STEPS, DOING (INTERVENTION) AND EVALUATION* THAT TAKES PLACE FOR EACH OF THE RWI'S. IN A COUPLE OF EXAMPLES SOMETIMES THE AUTHORS CHOSE TO USE THE WORDS **PLAN, DO, REVIEW TO CAPTURE THIS PROCESS. CONSULT THE **GUIDE FOR THE RWI** THAT I PROVIDED AND EXAMPLE PAPERS. **ALONG THE WAY AND IN CONCLUSION YOU MIGHT CONSIDER, DEPENDING ON RELEVANCE TO YOU:****

- What were the *most* exciting and motivating aspects of the learning experience/interventions?
- What obstacles did you come across? How did you deal with them?
- What surprises, if any, did you encounter: What caused you to be surprised?
- Do you believe this learning experience will have a lasting, long term impact on you? Have your management skills really changed? Has your behavior really changed?

- Going forward – what would the next 2, 6, 12 month plan look like?

****This will be the easiest writing you have ever done – make it your own
and enjoy the process.****