Robert Greenleaf described foresight as the central ethic of leadership; the implication is that if we are not utilizing our capacity of foresight—we may not be leading. Some believe that foresight, like the entrepreneurial spirit, is a capacity people are born with—you either have it or you don’t. This course assumes that foresight is a capacity that can be nurtured and developed and fashioned into a global systems framework.

COURSE TITLE
Masters level ORGL 537: Foresight & Strategy
Doctoral Level DPLS 7**: Foresight & Strategy
- 3 semester credits

COURSE DEVOLOPER
- John H. Horsman, Ph.D.

COURSE TEACHER
- John H. Horsman

COURSE DESCRIPTION
The course is designed to further develop the student’s servant-leader disposition, and integrate more of the servant-leader characteristics. The course explores the art, science and methods leaders use to acknowledge, stimulate, and further develop their capacity of foresight. Students engage macro-system perspectives and practice working with a global systems view, applying strategy and stewardship as they consider introducing creative vision into the reality of complex organizational and community systems (includes a 3 day residency).

COURSE GOALS
1. To enhance and further integrate the students Servant-leader philosophy; (dispositions, capacities, and skills).
2. To nurture and enhance the students pathfinding-foresight experience and knowledge (capacity, and skills).
3. To practice systems thinking strategically applying a micro, meso, macro, mundo system framework
4. To experience the power and potential of collective intelligence.

**COURSE COMPETENCIES**

Based on the course materials and processes students will demonstrate progress in their development as a Servant-leader in training by engaging the dispositions, capacity and skills of servant-first; congruence; communicator; compassionate collaborator; moral authority; foresight and strategy; and systems thinker (see attachment below).

From reflection on the readings, viewings, exercises, practices and assignments students will provide examples of aspects of the dispositions, capacities and skills in an applied decision making context, and be evaluated based on the specific criteria.

1. Systems thinking & Strategy: Demonstrate a capacity for reflection and applying experience to a global systems framework, as a foundation for developing a global systems strategy.
2. Systems thinking & Strategy: Demonstrate understanding of the principles, practices, methodology, and purpose of Theory U.

<table>
<thead>
<tr>
<th>Servant-leader Dispositions, Capacities &amp; Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Servant-first</strong></td>
</tr>
<tr>
<td>A Servant-leader models a listen-first relational disposition</td>
</tr>
<tr>
<td>• Serves a holistic perspective</td>
</tr>
<tr>
<td>• Serves the Individual’s and the Collective’s highest potential</td>
</tr>
<tr>
<td>• Serves with Care &amp; Concern</td>
</tr>
<tr>
<td>• Serves as Leader, Mentor, Coach, Midwife (roles)</td>
</tr>
<tr>
<td><strong>Moral Authority</strong></td>
</tr>
<tr>
<td>A Servant-leader models a respect centered disposition that inspires trust and confidence</td>
</tr>
<tr>
<td>• Leads &amp; Shares leadership, leadership is plural</td>
</tr>
<tr>
<td>• Accepts and Delegates Responsibility</td>
</tr>
<tr>
<td>• Considers Greenleaf’s <em>Best-Test</em></td>
</tr>
<tr>
<td>• Creates a Culture of Quality, Accountability &amp; Trust.</td>
</tr>
<tr>
<td><strong>Congruent Character</strong></td>
</tr>
<tr>
<td>A Servant-leader models a principle-centered disposition</td>
</tr>
<tr>
<td>• Embodies Integrity &amp; Humility</td>
</tr>
<tr>
<td>• Practices Healing (self and others)</td>
</tr>
<tr>
<td>• Practices Forgiving (self and others)</td>
</tr>
<tr>
<td>• Pursues Holism (integration).</td>
</tr>
<tr>
<td><strong>Communicator</strong></td>
</tr>
<tr>
<td>A Servant-leader influences with clarity</td>
</tr>
<tr>
<td>• Empathetic &amp; Generative listener</td>
</tr>
<tr>
<td>• Discerning</td>
</tr>
<tr>
<td>• Dialogic</td>
</tr>
</tbody>
</table>

(Horsman 2016 adaption of Sipe & Frick, 2009, p. 5)
| Compassionate Collaborator | A Servant-leader builds community wisely
| | • Value diversity, creates a sense of belonging
| | • Shows appreciation and builds trust
| | • Negotiates adversity
| | • Calls forth, guides and gathers individual & collective intelligence.
| Foresight | A Servant-leader models an action oriented learning healing disposition
| | • Uses Pathfinding-foresight
| | • Insightfully & Creatively anticipates the future
| | • Integrates historical knowledge
| | • Conceptualizes, envisions, clarifies, and experiments.
| Strategic System Thinker | Models a servant-stewardship disposition
| | • Thinks and acts strategically, leads change effectively
| | • Uses an adaptive global systems framework
| | • Works with complexity, paradox organizationally
| | • Values system harmony.

### COURSE MATERIALS

**Texts**


**Articles & Presentations** (provided in Course Resources by Module)

**Additional texts and readings required for DPLS students**

- Matesi: *The Significance of Foresight in Vision and Narrative Leadership*. ORGL 537 Course Resources.

**Films**


**UTube presentations**

- Burris, D: *Predicting the future* [http://www.youtube.com/watch?v=VV_v5HV9mtI](http://www.youtube.com/watch?v=VV_v5HV9mtI)
Wilber, K. *An Integral View*, a more expansive perspective this presentation presents an example of a global systems view: http://www.youtube.com/watch?v=i2dU06hVOsk

Why wolves change whole ecosystems |Permaculture http://www.permaculture.co.uk/videos/why-wolves-change-whole-ecosystems

**COURSE REQUIREMENTS**

<table>
<thead>
<tr>
<th>Module</th>
<th>Assignment Grading Matrix</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>M1</td>
<td>M2</td>
</tr>
<tr>
<td>Discussion</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Assignment</td>
<td>15</td>
<td>-</td>
</tr>
<tr>
<td>Residency</td>
<td>-</td>
<td>25</td>
</tr>
</tbody>
</table>

**Blackboard Dialog Forum**
(40% of grade)

**Masters Level ORGL 537 & Doctoral Level DPLS 7xx**
- Module One (weeks 1 & 2: 10 points)
- Module Two (weeks 3 & 4-intensive: 10 points)
- Module Three (weeks 5 & 6: 10 points)
- Module Four (weeks 7 & 8: 10 points)

**ORGL 537 Foresight & Strategy: Grading Rubric Dialog Forum DF M1 M2 M3 M4**

<table>
<thead>
<tr>
<th>Learning Outcome</th>
<th>Assessment Description</th>
<th>Desired 8/10 * 4 Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students will demonstrate an advanced understanding of the Servant Leadership (SL) philosophy and dispositions (servant-first; character congruence; communicator; compassionate collaborator; moral authority; foresight; systems thinking).</td>
<td>Blackboard Forum: Integrating literature with experience and dialogue on Servant-leadership. The focus is on comprehension and conceptualization of the philosophy in a written interactive dialogue of the what, why, how and who of Servant-leadership. Students write at least two annotated questions per module based on the assigned literature and respond to at least four other questions per module posted by other students.</td>
<td></td>
</tr>
</tbody>
</table>

**Dialogue Forum Topic: Literature & Experience Integration**

| One Annotated Question (AQ) per week = 2 points; Minimum of 2 AQS per module = 4 points | AQ identifies the concept with reference to the literature (relevant module content); adds context with an interpretation based on personal experience; poses a dialogical question. Minimum of 2 AQS per module. 
- Novice: no AQ = 0; a question is posed with little or no context, interpretation, or literature support = 0-1.62/AQ points. 
- Competent: AQ refers to a topic, but no literature reference, or personal experience, or interpretative context, not dialogical = 1.63-1.8 points 
- Proficient: Each post refers to a concept in the literature, provides experience with interpretation, poses a dialogical question = 1.9-2 points. | Points/Module |
<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Peer Response (PR) 3 per week. A minimum of 6 per module. May include a General (G) or Summary (S) comment</td>
<td>1 point/post</td>
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</tbody>
</table>

PR engages AQ, draws from the literature; integrates experience and takes the dialogue further (deeper or broader). Minimum of 6 PRs per module.
- Novice: No PR = 0; PR poses an opinion, comment, little to no context, no reference to the literature = 0-.81/PR
- Competent: Poses a reflective comment on AQ: may or may not refer to the literature, or another post, but not dialogical = .82-.95 points
- Proficient: PR addresses the AQ, relates it with experience and understanding, provides further interpretation and context, and supports any assertion with the literature = 9.6-1 points
- **Proficient Bonus**: student provides an insightful learning or teaching comment = 0-1 possible points; or an informative summary of the module learning = 0-1 point possible; or the contribution takes the topic to a deeper level of understanding, or leads to deeper question = 0-1 point possible.

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**Module One: The Framework (2 weeks)**
(M1 Dialog Forum + M1 Assignment = 25% of grade)
During Module One students will survey standard practices of forecasting; review Servant-leadership and foresight and be introduced to Greenleaf’s foresight model, the topic of Strategy and a Systems framework will also be introduced. Students will engage exercises, discussion, to stimulate reflection and learning on the topics.

**CONTEXT & EXPERIENCE**

**Introduction**
- Listen to the Module One Introduction by the course developer.
- View Horsman’s *The Foresight Strategy Framework*

**Read (in the following order)**

Knowledge: Foresight and Forecasting

A Global Systems Framework & Model

**View**

Foresight & Strategy
- Burris, Daniel: *Predicting the future* (Exercise: differentiating predicting from pathfinding-foresight) [http://www.youtube.com/watch?v=VV_v5HV9mtl](http://www.youtube.com/watch?v=VV_v5HV9mtl)

**REFLECTION & PRACTICE**

**Dialogue Forum: Engage (question prompts) 5 points/week = 10/100 points**
- What is your experience and knowledge of futuring and forecasting methods?
• What is your experience and understanding of foresight (Greenleaf & Horsman)?
• How does the film Secretariat reveal/address foresight and strategy?
• Describe your experience and reactions to Scharmer’s global systems framework.
• What is the difference between predicting (Burris) and pathfinding-foresight?

Exercise (blackboard)
The exercises are designed to generate awareness of our foresight capacity and experience, and are offered to stimulate learning, practice, questions, examples, reflections and dialogue in the Discussion Forum for each module.
➢ Based on commentary by Burris
  http://www.youtube.com/watch?v=VV_v5HV9mtI:
  o List 2-4 relevant natural cycles that impact your organization
  o List (2-4 relevant linear trends that impact your organization
  o What can you predict when you project these cycles and trends into the future?
  o Discuss your findings from the (Burris) Exercise with your group on the Blackboard

Engage in the Dialogue Forum

Assignment: using a global systems framework
Write on how the ecological, socioeconomic, and spiritual-cultural divides show up in one’s experience of work and life, and how foresight and strategy are relevant for deep transformational change. Use Scharmer’s framework of the three divides with examples, of the eight acupuncture points (address at least three) that are relevant in your experience. Relate where you have experienced moments of disruption; where have you experienced a world that is dying, and a world that is waiting to be born; describe what you have noticed about your inner response to these moments; in yourself; in your organization; in society. In your own words, drawing on your experience, evaluate the relevancy of the Pathfinding-foresight model as presented in the module. Explain why pathfinding-foresight is the central ethic of leadership and its strategic relevancy for system transformation. The assignments will be evaluated based on clarity, comprehension, reflection, application and examples. All work is to be presented in a professional APA format. Refer to M1 Rubric on Syllabus.

Masters Level ORGL 537
Module One Assignment is a 5-7 page double space paper, due end of week three. All papers are to be presented in professional APA format. Due end of Week Two.

Doctoral Level DPLS 7xx
Doctoral papers/presentations are expected to be more in depth than a master’s level paper by a) providing more detail; b) applying an additional theoretical perspective, or c) including additional research. Module One Assignment is an 8-12 page double space paper, due end of week two. All papers are to be presented in professional APA format.

The assignments will be evaluated based on clarity, comprehension, reflection, application and examples. All work is to be presented in a professional APA format.
### ORGL 537 Foresight & Strategy Grading Rubric

**Servant-leadership Knowledge and Skills**

**Learning Outcome**

Students will demonstrate an advanced understanding of the Servant Leadership (SL) philosophy and dispositions (servant-first; character congruence; communicator; compassionate collaborator; moral authority; foresight; systems thinking). Students will practice using a global systems framework, evaluate the pathfinding –foresight model and interpret its strategic role in transformational systems change.

<table>
<thead>
<tr>
<th>Method</th>
<th>Assessment Method Description</th>
<th>Desired Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write Paper ORGL 537 M1</td>
<td>Write on how the ecological, socioeconomic, and spiritual-cultural divides show up in one’s experience of work and life, and how foresight and strategy are relevant for deep transformational change. Use Scharmer’s framework of the three divides with examples, of the eight acupuncture points (address at least three) that are relevant in your experience. Relate where you have experienced moments of disruption; where have you experienced a world that is dying, and a world that is waiting to be born; describe what you have noticed about your inner response to these moments; in yourself; in your organization; in society. In your own words, drawing on your experience, evaluate the relevancy of the Pathfinding-foresight model as presented in the module. Explain why pathfinding-foresight is the central ethic of leadership and its strategic relevancy for system transformation.</td>
<td>12/15</td>
</tr>
</tbody>
</table>

1. **Timely** (students forfeit ½ grade for late papers: i.e. A to an A-)
2. **Length** (1/15 points)
   - a. Novice: 3-5 content pages = 0-0.90 points
   - b. Competent: 8 plus content pages = 0.91-0.95 points
   - c. Proficient: Required 5-7 content pages = 0.96-1 points
3. **Grammar and writing etc.:** (1/15 points)
   - a. Novice: 5+ major & minor errors = 0-0.90 points
   - b. Competent: 4+ minor errors = 0.91-0.95 points
   - c. Proficient: 0-3 minor errors = 0.96-1 points
4. **APA Citations & References** (1/15 points)
   - a. Novice: 5+ major & minor omissions or errors = 0-0.90 points
   - b. Competent: 4+ minor omissions or errors = 0.91-0.95 points
   - c. Proficient: 0-3 minor errors = 0.96-1 points
5. **Introduction** (1.5/15 points)
   - a. Introduction and general overview = 1 point
     - i. None, incomplete, approximate, changed = 0-0.90 points
     - ii. Overview and purpose addressed but incomplete/some change = 0.91-0.95 points
     - iii. Introduction focused, purpose accurate, and succinct = 0.96-1 points
   - b. Purpose Statement = 0.5 points
     - i. None, incomplete, approximate, changed = 0-0.45 points
     - ii. Overview and purpose addressed but incomplete/some change = 0.451-0.475 points
     - iii. Introduction focused, purpose accurate, and succinct = 0.476-0.5 points
5. **Conceptualization of the global systems framework, the three divides and eight acupuncture points = 5/15 points.**
   - a. Novice: Not stated, implied, or introduced but insufficient definition, explanation, or examples = 0-4 points
   - b. Competent: A partial conceptualization in own words or integrated a definition, or not comprehensively supported with examples = 4.1-4.5 points
   - c. Proficient: Clear articulated comprehensive definition in own words and/or accurately derived from the literature, along with relevant justification and examples = 4.6-5 points
6. **Conceptualization of the Pathfinding-foresight model and interpret how foresight and strategy might be used for personal & organizational transformation = 4/15 points**
   - a. Novice: Not stated, implied, or introduced but insufficient definition, explanation, or examples, or interpretation = 0-3.24 points
   - b. Competent: A partial conceptualization in own words or used a definition, but not
comprehensively supported with examples, or clarity of interpretation = 3.25-3.8 points

c. Proficient: Clear articulated comprehensive definition in own words and/or accurately derived from the literature, along with relevant justification and examples and interpretation = 3.85-4 points

8. Conclusion = 1.5/15 points

| a. Novice: Not stated, implied, not sufficient = 0-1.35 points |
| b. Competent: A partial conceptualization in own words or used a definition, but not comprehensive = 1.36-1.425 points |
| c. Proficient: Clear articulated comprehensive definition in own words and/or with accurately derived from the literature = 1.44-1.5 points |

| Total /15 |

Module Two (weeks 3 & 4-Residency) (35% of grade)

Masters Level ORGL 537 & Doctoral Level DPLS 7xx

During Module Two students prepare for, attend and conclude the three day residency. Blackboard postings for Week 3 are to be focused on materials and preparation for the residency.

All Master and Doctoral students are required to attend the residency scheduled during the fourth week of the course. During the residency (beginning of week 4) students participate in individual and group exercises, build community, dialogue, capture artifacts, and use them to reflect on the methods applied to create a strategy for implementing their ideas. Students arrive prepared to present and participate in a Case Clinic; engage in foresight generating methods, and afterwards apply strategy using a systems framework. The residency is in Spokane, at Gonzaga (or another designated location). Students are responsible for travel and accommodations. The location of the residency, along with options for room and board during the residency will be provided to the student in advance. There is an extra fee for the residency.

CONTEXT & EXPERIENCE

Introduction

- Listen/View: Module Two Introduction

Read (in the following order prior to the residency)

Collaborative leaders

- Blanchard: Building trust in Course Resources M2
  - Part I, Chapter 5: Openness to knowledge, (pp. 53-64)
  - Part I, Chapter 6: The practice of openness, (pp. 65-72)
  - Part I, Chapter 7: The future is now (p. 73-80)
- Scharmer: in Course Resources M2
  - U Tool Case Clinics
  - U Tool Journaling
  - Social Presencing Theater Letter
  - Systems Sculpting US
- Horsman: Notes in Course Recourses
  - Servant-leadership & Theory U.ppt: Course Resources M2
  - Foresight & Strategy Exercises.ppt Course Resources M2

**REFLECTION & PRACTISE**

**Dialogue Forum: Engage** *(week 3-4: 10/100 points)*

➢ Query and dialogue about your knowledge and experience of UTools type exercises you have experienced.

➢ Query and dialogue on Blanchard’s Greenleaf’s writings.

➢ Prepare Case Clinic to present during intensive

**Residency Exercises: participate, collaborate, dialog and reflect** *(20/100 points)*

Students are expected to participate and collaborate in a number of exercises, so dress to be comfortable and flexible in a variety of situations. After the Residency you will be strategically prototyping an idea using a systems framework. Refer to Grading Rubric H for guidance; Course Resources M2.

➢ Arrive prepared to present and participate in **Case Clinics.** The theme of the Case is *I am Stuck* or *We are Stuck!* Prepare your personal, group, or organizational Case using information from one or more of the following methods (dialogue interview; sensing journey; shadowing; stakeholder interview, and/or personal experience). The case is to be presented to a group of your classmates during the 3 day residency.

   o Present the Case in accord with the Case Clinic format and time frame.

   o Journal Outcomes: summarize findings of Case Clinic a) general impressions of presentation experience; b) group impressions; c) learning from feedback; c) what appears to be emerging; d) how the process could be improved.

   o Debrief with your group, with the whole class.

➢ Engage and apply U theory in an experiential methodology and procedure: capture artifacts of the U process with journal, pictures, symbols, metaphors, etc.

➢ Collaborate and support classmates, identify shifts and stages in the method, seek examples from experience and procedure and engage in generative dialogue about the process.

<table>
<thead>
<tr>
<th><strong>ORGL 537 Foresight &amp; Strategy Grading Rubric</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Servant-leader Dispositions Capacities and Skills</strong></td>
</tr>
<tr>
<td><strong>Learning Outcome</strong></td>
</tr>
<tr>
<td><strong>Method</strong></td>
</tr>
<tr>
<td><strong>Apply ORGL 537 M2</strong></td>
</tr>
<tr>
<td>Points</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>10</td>
</tr>
</tbody>
</table>

**1. Case Clinic:** Present a case and be a participant mentor in other Case presentations = 10 points.
- **Novice:** minimum preparation delivery and support = 0-8.1 points
- **Competent:** fair preparation delivery and support = 8.2-9.5 points
- **Proficient:** excellent preparation delivery and support = 9.6-10 points.

**2. Engage and Collaborate** in the experiential methodology and procedure and exercises: capture artifacts of the U process with journal, pictures, symbols, metaphors; support classmates, identify shifts and stages in the method, seek examples from experience and procedure and engage in generative dialogue and conceptual integration with the process = 8 points
- **Novice:** minimal engagement and support = 0-8.1 points
- **Competent:** fair engagement and support = 8.2-9.5 points
- **Proficient:** excellent engagement and support = 9.6-10 points.

---

**Module Three: Integrating a strategic systems framework** (2 weeks)
(Dialog Forum + M3 Assignment = 30/100 points)
During Module Three students practice prototyping and applying a systems framework to their ideas, then begin develop a strategy to integrate products and process to fruition in organizational systems.

**CONTEXT & EXPERIENCE**

**Introduction**
- Module Three Introduction

**READ (in the following order)**
- Cowan- *Spiral dynamics the Layers of Human Values: On 4.0 Strategy*
- Scharmer
  - UTool Dialog Interviews
  - UTool Sensing Journeys
  - UTool Shadowing
  - UTool Stakeholder Interviews

**REFLECTION & PRACTICE**

**Dialogue Forum:** Engage (question prompts) 5 points/week = 15/100 points
- Reflect on the residency experience report on your findings, new awareness,
insights, epiphanies etc.

- Comment on *Collective Wisdom*; macro-system applications
- Discuss of readings on *Source*
- Discuss Manoj Bhargava in *billions in change*

**Masters Level ORGL 537**

Module Three: is a 5-7 page paper due the end of week seven. All papers are to be presented in professional APA format. Due end of week 7 of the class.

**Doctoral Level DPLS 7xx**

Doctoral papers/presentations are expected to be more in depth than a master’s level paper by a) providing more detail; b) applying an additional theoretical perspective, or c) including additional research. Module Three: is an 8-12 page paper due the end of week 7 of class. All papers are to be presented in professional APA format.

**Assignment M3:** The reality of crystalizing, developing and testing a prototype idea/solution often takes years. The purpose of this paper is to jump start the process by encouraging you to continue the crystallizing process and begin to apply some U Tools to help you begin refining a solution. Take your Case up the U by strategically integrating foresight into a systems framework.

Based on information presented in the course (and the intensive); apply the *pathfinding-foresight* model to the crystalizing and prototyping processes. In addition you are tasked with applying Scharmer’s global systems framework to help clarify its value (acupuncture points) and to test your solution as you go, to be sure it is not inadvertently contributing to the problem (three divides).

1. For this assignment you are encouraged to use insights and learning from your Intensive Case Clinic exercise (you may also choose a new case issue to address).
2. Use *U Tool Prototyping.pdf* (M3 Course Resources) as the guide for the assignment, and write up your findings following the Prototyping: Address the 7 steps and the Prototyping Criteria 1-7 (adapt to context as necessary).
   a. To further test/develop your idea; collect additional organizational/societal data for this presentation using at least one of the following processes: Dialogue Interview; Sensing Journey; Shadowing; or, Stakeholder Interview (see Course Resources: Module Three).
3. Developing a global systems strategy: consider the eight acupuncture points (Scharmer), which ones are relevant to your idea, how does your prototype improve Scharmer’s three divides.

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<tr>
<th>Method</th>
<th>Assessment Description</th>
<th>Desired points = 12/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply &amp; Write</td>
<td>Take your Case up the U by strategically integrating foresight into a systems framework.</td>
<td>Based on what you information presented in the course (and the intensive); apply the <em>pathfinding-foresight</em> model to the crystalizing and prototyping processes.</td>
</tr>
<tr>
<td>ORGL 537 M3</td>
<td>For this assignment you are encouraged to use insights and learning from your Intensive</td>
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**ORGL 537 Foresight & Strategy: M3 Rubric**
Case Clinic exercise (you may also choose a new case issue to address).
- To further test/develop your idea; collect additional organizational/societal data for this presentation using at least one of the following processes: Dialogue Interview; Sensing Journey; Shadowing; or, Stakeholder Interview (see Course Resources: Module Three). Use *U Tool Prototyping.pdf* (M3 Course Resources) as the guide for the assignment, and write up your findings following the Prototyping: Address each the seven steps and the prototyping criteria 1-7 (adapt to context as necessary).
- Developing strategy: consider the eight acupuncture points (Scharmer), which ones are relevant to your idea, how does your prototype improve Scharmer’s three divides.

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<tbody>
<tr>
<td>a. Novice: 3-5 content pages =0-0.9 points</td>
<td>/1</td>
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<tr>
<td>b. Competent: 8 plus content pages = 0.91-0.95 points</td>
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<tr>
<th>2. Length (1/15 points)</th>
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<th>3. Grammar and writing etc.: (1/15 points)</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>b. Competent: 4+ minor errors = 0.91-0.95 points</td>
<td>/1</td>
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<tr>
<td>c. Proficient: 0-3 minor errors = 0.96-1 points</td>
<td>/1</td>
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<tr>
<th>4. APA Citations &amp; References (1/15 points)</th>
<th>Points</th>
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</thead>
<tbody>
<tr>
<td>a. Novice: 5+ major &amp; minor omissions or errors = 0-0.90 points</td>
<td>/1</td>
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<tr>
<td>b. Competent: 4+ minor omissions or errors = 0.91-0.95 points</td>
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<tr>
<td>c. Proficient: 0-3 minor errors = 0.96-1 points</td>
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<tr>
<th>5. Introduction (1.5/15 points)</th>
<th>Points</th>
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<tr>
<td>a. Introduction and general overview = .5 point</td>
<td>/1</td>
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<tr>
<td>i. Novice: None, incomplete, approximate, changed = 0-0.45 points</td>
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<tr>
<td>ii. Competent: Overview and purpose addressed but incomplete/some change = 0.451-0.475 points</td>
<td>/1</td>
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<tr>
<td>iii. Proficient: Introduction focused, purpose accurate, and succinct = 0.476-0.5 points</td>
<td>/1</td>
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<tr>
<td>b. Purpose Statement = 0.5 points</td>
<td>/5</td>
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<tr>
<td>i. Novice: None, incomplete, approximate, changed = 0-0.45 points</td>
<td>/5</td>
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<tr>
<td>ii. Competent: Overview and purpose addressed but incomplete/some change = 0.451-0.475 points</td>
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<td>iii. Proficient: Introduction focused, purpose accurate, and succinct = 0.476-0.5 points</td>
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<tr>
<th>6. Describe methods used and prototyping strategy = 4/15 points: Identify the processes and helpers used to gather data (i.e. Dialogue Interview; Sensing Journey; Shadowing; Stakeholder Interview, Case Clinic). Identify/list relevant data from the data collection processes (intensive and/or other methodologies)</th>
<th>Points</th>
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<tbody>
<tr>
<td>a. Novice: Aspects or criteria of the model not defined or described, or not accurately described = 0-3.24 points</td>
<td>/4</td>
</tr>
<tr>
<td>b. Competent: Criteria described, but too brief or too much information relative to the purpose of the paper. Lack of clear detail = 3.25-3.8 points</td>
<td>/4</td>
</tr>
<tr>
<td>c. Proficient: Accurate definitions, summary and conceptualization/interpretation, quotes, paraphrases of the model = 3.81-4 points</td>
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<tr>
<th>7. Crystalizing and prototype = 4/15 points: using interpretive imagination and insight demonstrate your idea development strategy to systematize your idea. Demonstrate integration of the findings from the applications into the case idea by taking the reader through the 7 prototyping steps and the 7 prototyping criteria. What needs to be done next?</th>
<th>Points</th>
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<tbody>
<tr>
<td>a. Novice: Aspects or criteria of the model not defined or described, or not accurately described 0-3.24 points.</td>
<td>/4</td>
</tr>
<tr>
<td>b. Competent: Criteria described, but too brief or too much information relative to the purpose of the paper. Lack of clear detail = 3.25-3.8 points</td>
<td>/4</td>
</tr>
<tr>
<td>c. Proficient: Accurate definitions, summary and conceptualization/interpretation, quotes, paraphrases of the model = 3.81-4 points.</td>
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8. **Developing a global systems strategy for your case** = 2/15: consider the eight acupuncture points (Scharmer), which ones are relevant to your idea, how does your prototype improve one or more of the three divides?
   - a. Novice: Aspects or criteria of the model not defined or described, or not accurately described = 0-1.62 points
   - b. Competent: Criteria described, but too brief or too much information relative to the purpose of the paper. Lack of clear detail = 1.63-1.9 points
   - c. Proficient: Accurate definitions, summary and conceptualization/interpretation, quotes, paraphrases of the model = 1.91-2 points.

9. **Conclusion** = .5/15 points: Summarize significant learning points from doing the exercise
   - a. Novice: Not stated, implied, not sufficient = 0-1.35 points
   - b. Competent: A partial conceptualization in own words or used a definition, but not comprehensive = 1.36-1.425 points
   - c. Proficient: Clear articulated comprehensive definition in own words and/or with accurately derived from the literature = 1.44-1.5 points.

**Module Four: integrating Servant-leader dispositions capacities & skills**
(2 weeks Dialog Forum 10 + 5 points = 15/100)

**CONTEXT & EXPERIENCE**

**Introduction**
View/Listen: Module Four Introduction

**Read** (in the following order)

**On Strategy**
- Reams: Transforming leader: Integral leader Course Resources M4
- Horsman
  - o Developing Intuition; Course Resources M4
  - o Servant-leader Dispositions: Course Resources M4
- Draw on any resources and materials used in the Servant-leader Concentration that you think may be helpful; i.e. review your Module Three ORGL 530 Servant-leader paper.

**View**
- How Wolves Change Rivers/Ecosystems at [https://www.youtube.com/watch?v=ysa5OBhXz-Q](https://www.youtube.com/watch?v=ysa5OBhXz-Q)

**REFLECTION & PRACTICE**
**Dialog Forum: Engage** (first question prompt = 5 pts, remaining prompts = 10 points).
- What is strategy?
- Dialog on your process and practice/experience applying the various U Tools
- Discuss the Wolf Ecosystem: what does that have to do with foresight and strategy.
- Practice using the Global Systems Framework by assessing your prototypes to the 3 divides and some of the acupuncture points.
Philosophy of Servant-leadership in the Dialog Forum. Describe your journey through the Servant-leader Concentration. How has knowledge, experience and learning of the Servant-leader dispositions, capacities and skills influenced the development of your Servant-leader philosophy? In what ways is your practice of servant-leading emerging as a way of being, a world view? See Servant-leader Dispositions.pdf in Course Question Prompts

- How does one make foresight the central ethic of leadership?
- How does one learn to be a servant-leader through learning to listen?
- How do servant-leaders build community?
- What does justice and forgiveness have to do with servant-leading?

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<tr>
<th>ORGL 537 Foresight &amp; Strategy – M4 Rubric</th>
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<tbody>
<tr>
<td><strong>Servant-leader Dispositions Capacities &amp; Skills</strong></td>
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<tr>
<td>Learning Outcome</td>
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<tr>
<td>Method</td>
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<tr>
<td>Assessment Description</td>
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<td>Desired Points =</td>
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**Servant-leader Summation Statements:** Disposition development and integration = 10/100 points

1. Novice: Summation statements presented; however, less than the minimum number of dispositions; example applications incomplete, approximate, or changed from assignment; no further development proposal = 0-8.1 points

2. Competent: Adequate presentation; met minimum required summation statements; some examples/applications not clear or fully addressed; some topics addressed lighter than others, some light/incomplete, or some changed = 8.2-9.5 points

3. Proficient: Summation statements presented; example applications presented; focused, accurate, succinct; reasonable proposal for further development = 9.6-10 points.