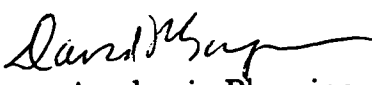


SIMON FRASER UNIVERSITY

OFFICE OF THE VICE-PRESIDENT, ACADEMIC

MEMORANDUM

To: Senate

From: D. Gagan, Chair 
Senate Committee on Academic Planning

Subject: Non-Credit Certificate Program:
Certificate in Leadership Learning
(SCAP Reference: SCAP 98-31)

Date: June 15, 1998

Action undertaken by the Senate Committee on Continuing Studies and the Senate Committee on Academic Planning gives rise to the following motion:

Motion:

"that Senate approve and recommend to the Board of Governors as set forth in S.98 - 64 , the Non-Credit Certificate Program: Certificate in Leadership Learning."

SIMON FRASER UNIVERSITY

Memorandum

To: Alison Watt, Secretary
Senate Committee on Academic
Planning

From: Mark Selman, Chair
Senate Committee on
Continuing Studies

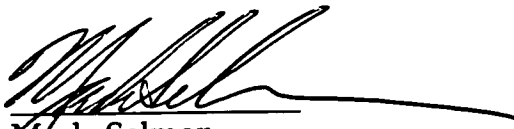
Re: Proposal for Consideration
by SCAP

Date: June 2, 1998

Enclosed is a proposal for a Non-Credit Certificate Program: *Certificate in Leadership Learning*. The Senate Committee on Continuing Studies has recommended that this proposal go forward to SCAP for consideration, approval and forwarding to Senate. Please place this proposal on the agenda for the June 10, 1998 meeting of the Senate Committee on Academic Planning.

Please note that SCAP is being asked to consider the certificate proposal only. The specific offering designed for ICBC is provided only as an example.

I would be pleased to serve as the resource person for this proposal at SCAP.


Mark Selman

/encl.

Proposal for a
Non-credit Certificate Program
in
Leadership Learning

Senate-approved, credit-free certificate programs have a series of requirements designed to assure high quality in continuing education. These include: the supervision of a department or academic steering committee, 120 contact hours of instruction and an explicit method of evaluating student performance. Existing certificates offer coherent educational programs which enhance the professional development of a wide range of participants.

Experience in creating non-credit educational programs directly for employers suggests that the certificate designation can have a valid use in recognizing high level, programmatic workplace education provided by Simon Fraser University. This proposal recommends the creation of a new, flexible certificate program that can be tailored to a variety of specific educational needs. The key features of this proposal are:

- a) The Certificate will be offered for specifically designed, non-credit workplace education programs constituting the equivalent of at least 120 hours of instruction.
- b) The Certificate will be interdisciplinary in its approaches, drawing upon disciplines from across the University to offer the combination of knowledge and skills development that is most appropriate for high level learning needs in specific work situations.
- c) The Certificate will emphasize the integration of theory and practice, through exercises, projects and methods of evaluation emphasizing the application of classroom instruction. A central objective will be the encouragement of continuous learning as a key attribute of organizational leadership.
- d) The Certificate will permit flexibility in its modes of delivery. Where appropriate to the educational purposes of the program, up to one-third of the contact hour requirement may be met through non-traditional means, including guided project work, electronic conferencing, specific application exercises and other forms of learning enhancement.
- e) Individual offerings of the Certificate must be approved by the Senate Committee on Continuing Studies and will be guided by an academic steering committee, to include at least three regular SFU faculty from at least two different departments and at least one Continuing Studies Program Director, together with any appropriate community, corporate and student representation. Evidence of appropriate consultation with faculties/departments will be submitted at the time approval is sought.
- f) All direct and indirect costs of each offering of the Certificate will be met through contractual arrangements.

Rationale

There is substantial potential for the University to design high calibre executive development programs for in-house delivery to major employers. Organizations have a strong interest in helping their employees to broaden their skills and perspectives in order to take on higher levels of responsibility, and increasingly see directed educational programs from external providers as an important means to this end. There is a particular interest in interdisciplinary approaches that foster the broadly based technical and human skills commonly identified under the rubric "leadership." The impetus for such education often arises from specific organizational issues which can best be addressed through in-house programs.

A major opportunity for the University in serving this need is to draw upon a wide variety of university resources, including disciplines across the faculties, existing non-credit programs and courses and expertise in program design to provide the most appropriate combination of learning experiences for specific leadership development situations. Both corporate clients and their employees appreciate the University's involvement in education of this kind -- its attention to quality, its variety of expert resources, its interest in long-term program effectiveness, and its responsiveness in tailoring programs for specific needs. Both clients and employees would also appreciate the opportunity to have suitable programs of study recognized through the awarding of a Senate-approved credit-free certificate. Students in such programs are likely already to have at least an undergraduate degree, but are still motivated by the programmatic focus and stipulated requirements of a university certificate.

In addition to increasing the market opportunities for continuing studies activities of the University, the establishment of a Leadership Learning Certificate will have significant educational advantages. Many Human Resource Development specialists within major organizations have expressed frustration with "one-off" in-house training programs offered by educational consultants. They see these as having only limited effectiveness over the long term. In contrast, a university program that provides diverse yet coherent educational modules, and then integrates the classroom learning through the guided application to an actual work situation has a much better chance of creating a pattern of sustained learning. The Leadership Learning Certificate program will deliberately bring together formal and experiential learning opportunities in order to maximize educational effectiveness and to reinforce continuous learning as a key aspect of organizational leadership.

This program will differ from other SFU non-credit programs for client organizations in several respects. The Executive Management Development Program, offered by the Faculty of Business Administration through the offices of Continuing Studies, offers a series of intensive sessions on the core areas of management education at Harbour Centre. It is a well-respected program which draws together students from various organizations, but that very design prevents the kind of specifically customized offering the Certificate will provide. Furthermore, the EMDP has an established, discipline-based curriculum, and therefore lacks the flexibility to draw from other areas of University expertise. Similarly, professional certification programs within Continuing Studies follow pre-determined curricula that address established needs. Other non-credit programs, such as those offered by Writing and Publishing, focus on specialized areas of training.

The very flexibility and adaptability of the Leadership Learning Certificate means that each offering of the program will be somewhat different. Under these circumstances, a senior level committee should approve each instantiation of the program, as is now the case for Integrated Studies Programs within the Bachelor of General Studies Degree, in order to insure the continuing quality and integrity of the Certificate on behalf of Senate. It is proposed that the appropriate committee in this case would be the Senate Committee on Continuing Studies. A program outline should come to the SCCS for approval in advance of any offering, detailing the steering committee for that offering, as well as the curriculum, instructors, methods of evaluation and any unusual pedagogical methods.

The attached outline for a specific offering of the Leadership Learning Certificate follows extensive consultations with ICBC. SFU is under contract to deliver the instructional modules, but has also thoroughly discussed with ICBC the advantages of extending the series of modules into an educational program that would deserve certification. The outline is presented here for approval, but also as an informative example of the kind of program that the Certificate is designed to make possible.

SFU/ICBC Leadership Learning Certificate Program

Simon Fraser University has contracted with the Insurance Corporation of British Columbia to offer an educational program to two pilot groups of its managers over the coming eight months. The program is designed to assist the Corporation in making a significant organizational transition to "Community-Based Customer Units," (CBCU's) in order to decentralize some of its services. The Leadership Learning Certificate Program is specifically designed to further assist in this process by encouraging an environment of continuous learning.

The move to CBCU's is going to present ICBC managers with many new challenges and responsibilities. As this structural change brings the Corporation and its managers closer to the community, one key challenge will be to understand community process. ICBC's community based leaders will need to develop their strategic thinking skills in order to effectively interact with communities. They will need to clearly understand the community and the Corporation's competitive position, in order to effectively deliver products and services that are responsive to local needs. And, they will need to develop their marketing skills in order to strengthen the Corporation's competitive position and build its credibility. In addition, the move to regional business units will require an elevated understanding of finance and financial processes, from managing day to day financial responsibilities to understanding the broader implications of financial partnerships with external agencies. As well, the more autonomous business units will challenge managers to effectively set the direction for and lead cross functional units.

The Leadership Learning Certificate Program will include five two-day instructional modules, to be taught by a total of four SFU faculty and four other instructional personnel regularly associated with SFU (see Attachment). The topics of the five modules are: marketing, the political environment, financial management, strategic planning and leadership, and community partnering. The Program will also include a carefully planned educational extension of this classroom sequence, involving the guided application of the materials presented, a facilitated e-mail network, and monitored team or individual project work.

The Steering Committee for the SFU/ICBC Leadership Learning Certificate Program will include: Patrick Smith, Professor of Political Science; Colleen Collins-Dodd, Assistant Professor (Marketing), Faculty of Business Administration; Evan Alderson, Associate Professor, School for the Contemporary Arts; Mark Selman, Director of Extension Credit and Acting Dean of Continuing Studies; Charles Holmes, Continuing Studies; Hal Wake, Leadership Comitium, SFU; and Chris Neep, Director of Training, ICBC.

I. The Modules:

1. Marketing -- taught by Prof. Collins-Dodd

The purpose of this module is to provide ICBC Managers with the fundamentals of the marketing process. In addition to providing a strong conceptual understanding of the field this module will help managers develop greater insights into the complex area of marketing decision making. Managers will have the opportunity to apply fundamental marketing concepts and offer practical solutions to real-life marketing problems. They will consider marketing issues relative to ICBC, such as: product differentiation, buyer behavior, segmentation analysis, advertising, pricing, and social marketing.

2. Political Environment -- taught by Prof. Smith

The key focus of this module will be to further understand both how ICBC fits within the broad B.C. political environment, and regional issues such as understanding the challenges of local municipalities. This module will provide a non-partisan, systematic analysis of the legislative process, business-government relations, the role of the news media, and the pressures on governments. It will enhance managers' sensitivity to the political and social context within which the regional operations of ICBC take place.

3. Financial Management -- taught by Beverly Trifonidis

The emphasis of this module will be to build on managers' diverse financial knowledge base and expand overall financial literacy, as pertains to day to day financial management as well as broader financial implications of community based partnering. It will use financial materials directly related to ICBC's operations.

4. Leadership -- taught by Prof. Bukszar (Business Administration), Prof . Alderson and Mr. Holmes.

Emphasis will be on the challenge of effectively leading and managing change within, as well as leading beyond the walls of the Corporation through the development of strategic partnerships in the community. The first day of the module will focus on strategic planning; the second day on the identification and articulation of values, the assessment and management of change and the development of teamwork.

5. Community Partnering -- taught by Michael Fogel and Hal Wake

This module will explore issues and processes that directly affect the development of mutually beneficial community partnerships. One day of this module will include a moderated forum involving key community leaders. There will also be an introduction to stakeholder process through the principles of interest-based negotiation.

II. Application

The remainder of the Certificate program is an extension of the work of the modules focusing on the direct applications of classroom content and the encouragement of continuous learning. Charles Holmes and Evan Alderson, who will host and coordinate the delivery of the modules, will have primary responsibility for guiding this aspect of the program.

Step 1: At the beginning of the instructional program, students will select one or more issues anticipated to be key challenges in managing a CBCU.

Step 2: Within two weeks of the delivery of each of the first four modules, students will present a brief paper, summarizing possible applications of the module content to the selected issue. An e-mail network will be established through which submissions and comments can be shared with all Certificate participants, and continuing dialogue around relevant issues be encouraged.

Step 3: At the conclusion of the five modules, certificate participants will spend an additional classroom day discussing projects, forming teams where appropriate and developing a plan of work for the final project.

Step 4: Final projects will draw together the reflections on the individual modules and the follow-up discussions to outline a preferred approach to the selected key issue(s). In offering feedback on these projects the host instructors may consult with the other program instructors or other University experts. The Corporation may choose to arrange for the projects to be presented internally.

Step 5: As requested by the Corporation, the host instructors and other University personnel will be available for discussion and advice on each participant's needs and opportunities for further learning.

The Application part of the Certificate, through its combination of brief presentations, e-mail conferencing, an additional classroom day and final project will be equivalent to a minimum of 40 instructional contact hours. The modules will involve 80 contact hours.

May 26, 1998

ICBC/SFU LEADERSHIP LEARNING PROGRAM INSTRUCTORS

Marketing Module

Colleen Collins-Dodd

Currently an Assistant Professor in Marketing in the Faculty of Business, Simon Fraser University, with previous experience in the Office of the Premier and the department of Federal and Intergovernmental Affairs for the Province of Alberta, Colleen has been involved with teaching marketing at both the undergraduate and graduate levels. Her interests lie in the areas of Brand Equity, Retailing, Service Quality, Public Policy and Hi-tech marketing.

Political Environment Module

Patrick Smith is a professor and past chair of Political Science, and currently Director of the Institute of Governance at Simon Fraser University. He has written extensively on local/municipal government, intergovernmental relations, public policy and a great diversity of other topics for political science journals and related edited books/volumes. Patrick has taught in the UK, at the University of Victoria (School of Public Administration), Acadia University, and Dalhousie University as well as Simon Fraser University. He has been an advisor/consultant to the BC Government on regional governance and planning, and to the Government of Canada on the local franchise and aboriginal self-government. His recent research includes co-authoring a book analyzing the 1993 Canadian General Election and a book on Justice Policy and Administration.

Finance Module

Beverly Trifonidis has recently been appointed to the University College of the Fraser Valley's Faculty of Business Administration. She is a certified public accountant and holds a master's degree in professional accounting. Her teaching interests include the behavioural implications of financial and managerial accounting, and accounting in the non-profit sector. She has conducted seminars and workshops on financial management in both the profit and non-profit sectors.

Leadership Module

Ed Bukszar is an Assistant Professor of Strategic Management in the Faculty of Business Administration at Simon Fraser University. His research and teaching focus on Strategic Decision Making, Business Strategy and Behavioural Decision Theory. Dr. Bukszar has supervised the strategic analyses of more than 50 local, national and international firms, written articles in numerous publications and is presently editing a casebook for use in the strategy courses. He is also winner of the *Canada Trust Distinguished Teaching* award.

Evan Alderson is an Associate Professor in the School for the Contemporary Arts at SFU, currently on assignment developing continuing education programs for adult learners. He has held numerous positions in academic administration at SFU, among them founding Director of the School for the Contemporary Arts, founding Director of the Graduate Liberal Studies Program and Dean of the Faculty of Arts from 1992-97. Dr. Alderson has extensive experience teaching adults in the Graduate Liberal Studies Program and in an innovative degree completion program for corporate employees.

Charles Holmes is an experienced educational consultant and facilitator who has worked at SFU as Director of Business Programs for Continuing Studies and for many years in private consulting. He has conducted numerous workshops and short-courses for UBC, SFU and private clients in such areas as cross-cultural negotiation, strategic planning and leadership. He is currently employed by SFU to develop learning partnerships with major British Columbia employers.

Community Partnering Module

Instructor: Michael Fogel

Michael Fogel is a mediator, facilitator and conflict resolution educator in private practice. He has a Masters degree in counseling psychology from the University of British Columbia and his career has focused primarily on conflict resolution/management and mediation, organizational development and public involvement processes. As a facilitator/consultant, Michael works with various private and public organizations and government entities (municipal, provincial and federal) facilitating restructuring and change, long-term planning and problem-solving; as well as communities engaged in consensual decision-making with respect to a range of community and public policy issues.

Moderator: Hal Wake

Hal Wake is a journalist with experience in radio, television, video documentary and print, and a wide-ranging interest in public affairs and public policy. In a 17-year career at the CBC, he helped develop and produce a number of radio programs including seven years with Morningside and most recently was the host of the daily current affairs program Early Edition. He was the co-host of Learning a Living, a 13-part television series that examined the new world of work, and has reviewed books for the Vancouver Sun. As a moderator, he has lead public forums for the International Conference on Aids, Gambling Policy in BC, a National Conference on Restorative Justice and on Ethics in Journalism for the Canadian Association of Journalists. Before entering journalism he worked as a child care worker for Carnarvon Out-of-School Care and the Children's Aid Society of Ottawa. Hal is currently the moderator of the Leadership Comitium for Simon Fraser University.