



**(PLEASE NOTE THAT THE AGENDA MAY UNDERGO CHANGES, BUT IS A PRETTY ACCURATE DESCRIPTION OF WHAT FELLOWS CAN EXPECT)**

# **THE LOUISIANA EFFECTIVE LEADERSHIP PROGRAM**

## **CURRICULUM 2010-2011 LaELP3**

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# ***PROGRAM DESCRIPTION***

The Louisiana Effective Leadership Program (LaELP) seeks to enhance the capacity of mid-career leaders serving Louisiana to contribute to the empowerment of their communities and the transformation of their countries. Central to the Program's work is the promotion of those public values that are essential to the health and sustainability of democracy and civil society.

The Program Curriculum is based on learner-centered principles and is designed and organised around five main themes:

***Leadership in Context and Culture:*** Dialogue and activities will focus on transformative theories of leadership, their underlying assumptions and values, the contrasts and similarities imposed by culture and context, and the implications of traditional versus values-centered theories for personal and institutional effectiveness.

***Ethics and Accountability:*** The key issue to be explored is the reciprocal relationship between leaders and their constituencies, including a) identifying and resolving ethical dilemmas in personal and professional life and b) naming and resolving tensions between often competing interests created by "public expectations", major stakeholder institutions, people traditionally without effective voice, and the leader's own interests in exercising and maintaining power and acting with ethical integrity.

***The Importance of Personal Renewal:*** The objectives are to a) emphasize the centrality of personal renewal – mind, spirit and body – for the exercise of sustained effective leadership and b) explore the roles that personal coaching can play in the process of renewal.

***Communications for a Civil Society:*** The central question is how leaders can recast communications as a device for political control into a tool for strengthening the organizations they lead and civil society more broadly. Topics will include expanding citizen participation through the dissemination of useful information and, through a year-long public policy planning project required of Fellows, how leaders can usefully respond to, and help shape, public opinion on behalf of social equity, ethically and effectively.

***Building Supportive Networks:*** The focus is on building and making use of resources, relationship capital and social networks – people and institutions particularly, but information vehicles like the Internet as well – to sustain rising leaders as they ground decision-making on moral principles.

# ***PRE-OPENING RETREAT WORK***

## **GOALS**

Each Fellow should:

- 1) Study and come to terms with the concepts in the Program's "Intellectual Context and Sought Competencies" document.
- 2) Reflect on one's current leadership behaviors: areas of strength and areas that require further development and/or refinement
- 3) Become conversant with historic "freedom struggles" and present transformations in Louisiana
- 4) Become familiar with other relevant literature (as assigned) and ideas related to transformational/ servant leadership and associated issues central to this Program
- 5) Understand the roles and purpose as well as the differences between the coaching and mentoring components of the Program

## **ACTIVITIES**

Each Fellow should:

- 1) Read the Program's *Intellectual Context and Sought Competencies* document which serves as a foundation for the Program
- 2) Complete online the *Self Assessment Tool for Leadership Behaviors*
- 3) Complete assigned readings prior to the Retreat, including the Program's *Coaching and Mentoring Handbook*

## **OPENING RETREAT – General Format LaELP3**

**Saturday, May 8 – Friday, May 14, 2010**

### ***OVERALL RETREAT GOALS***

- 1) Stimulate learning and growth, especially in and for each Fellow, with particular respect to the five sets of competencies (and relevant behaviors) associated with transformational leadership
- 2) Develop a common sense of the Fellowship among all participants, and especially Fellows
- 3) Develop a commitment by each Fellow to active participation in each of the Program's other learning components (coaching, across the year assignments,

- mentoring, program feedback/evaluations, Mid-year and Closing Retreats, and on-going networking)
- 4) Prepare Fellows for the challenges and opportunities of applying transformative values when re-entering work, home and community

## ***RETREAT PROGRAM***

### **DAY 1 – Saturday, May 8– Orientation to the Program and to the Fellowship**

#### **DAY’S GOAL:**

- 1) Begin to build in Fellows and Staff a sense of “the Fellowship” and how it will evolve, particularly at the Retreat

#### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Acquaint her/himself with staff and other Fellows, and the flow of the Curriculum for the year and for the Retreat
- 2) Present him/herself to others as a person who is committed a) to learning from others through the fellowship in order to grow as a transformative leader and b) to sharing her/his own wisdom to advance the learning of “the fellowship” as a whole

#### **SCHEDULE**

02:30p – 04:30p      **Registration for rooms**

04:30p – 05:00p      **Registration – Program**

05:00p – 06:15p      **Welcome and Orientation**

Led by Senior Staff

Welcome from Southern University

Welcome and review of the history and goals of the Effective Leadership Program by Senior Staff

Introduction to Program requirements by Senior Staff

Introduction to the Coaching component of the Program by Lead Coach

Introduction to the Mentoring Aspect of Program by Senior Staff

Introduction to the Practical Aspects of the Program by Staff

Orientation to the Venue, Rooms, Accommodation, Amenities, etc. by Staff

06:30p – 07:30p      **Welcome Reception and Light Supper**

07:30p – 09:30p      **Introductions**

Three/Four Minutes each: In the African tradition of storytelling, self-introductions by Fellows and Staff, via 1) name, 2) a brief recounting of an illustrative life story, 3) a "teachable point of view" (some cultural life philosophy or piece of wisdom passed on by a friend, elder, parent, etc) and 4) a verbal commitment to the Fellowship and the Program.

Facilitated by a Senior Staff

### **Preparation for following day:**

- 1) Complete and submit the Daily Evaluation Form for submission to Program staff
- 2) Reading: *Four Key Skills & Set of Guidelines* document (Course Material)
- 3) Reading: *The Daily Learning and Review Process* (Course Material)
- 4) Reading: *The Discernment Process: a Guide to Fellow Duo or Trio Sessions* (Course Material)
- 5) Familiarize yourself with *Daily Reflection-Learning Log* (Hand out)

## **DAY 2 – Sunday, May 9 –Leadership in Context**

### **DAY'S GOALS:**

- 1) Stimulate each Fellow's learning and growth with respect to the general competencies and related behaviors associated with this topic
- 2) Deepen the sense of familiarity and engagement among participants that was initiated in the previous days

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Review or learn anew the servant or transformative theory and definitions of leadership – both in "chalk and talk" as well as facilitative group modes – and contrast these formulations with traditional leadership paradigms

- 2) Actively assess the relevance of all or parts of these competing theories and definitions for her/his own responsibilities as a leader through group dialogue, other planned events and personal reflection
- 3) Learn more about as many other Fellows as possible
- 4) Answer these questions: What have I learned today with respect to the competencies/behaviors and in general? How might what I have learned affect my behaviour as a person and as a leader?

## **SCHEDULE**

07:00a – 08:15a      **Exercise/Quiet-Reflection Time  
& Breakfast**

08:15p – 09:00a      **Introduction to Daily Fellow Learning Points**

Each day, Saturday - Thursday, a senior member of staff will facilitate the session on Daily Fellow Learning Points. This session serves to empower participants through the following purposes: (a) it aids you (the Fellows) in both reflecting-in-action (to reflect on your actions and interactions the previous day) and reflecting-on-action (how the learning and insights of the previous day have caused you to rethink and restructure your understanding and subsequent behaviour with regard to the previous day's theme.

The objective of the 30 minute interlude in the morning is for Fellows to share among themselves their interpretations of the previous day, and give feedback as to the impact, on themselves, of the Program thus far.

Sessions will take the following format:

One minute for stating:

- (a) one learning point from the previous day
- (b) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point

09:00a – 11:00a      **Session: Plenary Session**

Theme: *The Role of Context in Transformative Leadership*

Transformational leaders serve to change the status quo by appealing to followers' values and their sense of higher purpose. They articulate the contextual problems in the current system and have compelling visions of what a new society or organisation could be – to raise the contextual standard of human conduct. We will also explore the

relevance of the South African concept of *ubuntu* to leadership challenges in transforming Louisiana.

During this session, Fellows will be exposed to the practice of transformational leadership in the three sectors of democratic society, highlighting how the context of leadership often shifts the instruments of power and influence.

Speaker: Ambassador James A Joseph

General Question & Answer/Discussion Session

11:00a – 11:15a **Refreshment Break**

11:15a – 12:00n **Session: Plenary**

***Presentation & Demonstration on Personal Reflection/Discernment Groups:*** Senior Staff

Refer to document: *The Discernment Process*, which provides some thoughts to guide this process

***Presentation on SurveyMonkey:*** Staff

***Presentation on “Blackboard:*** Staff

12:00n – 01:15p **Lunch**

01:15p – 02:30p **Personal Reflection Session**

02:30p – 04:30p **Session: Plenary**

Theme: ***The Role of Culture on Transformative Leadership***

During this session, we will examine the impact of culture on leadership styles, strategies and paradigms. In addition, we will acknowledge the fact that because people think about and value things differently, there is always a dilemma - a need to reconcile diverse paradigms. Confronting and reconciling these dilemmas is the current challenge for leaders globally. Real decisions, we will see, must take into account personalities, agendas and intent, emotions, beliefs, symbols and appearances.

Resource Persons:

TBA

04:30p – 04:45p Refreshments

04:45p – 06:30p ***Discernment Group Meetings***

07:30p – 09:30p      **Dinner**

### **Preparation for following day:**

Familiarize yourself with the *Case Study material* and the *Group Assignments* for tomorrow (Hand Outs)

Complete the *Daily Evaluation Form* for submission to Program staff

## **DAY 3 – Monday, May 10 – *Leadership Ethics and Accountabilities***

### **DAY’S GOALS:**

- 1) Stimulate each Fellow’s learning and growth with respect to the two general competencies and related behaviors associated with this topic
- 2) Encourage broader and deeper personal engagement between Fellows

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Review or learn a new key ethical and accountability precepts
- 2) Actively assess the relevance of those precepts for his/her own behaviour as a leader
- 3) Extend use of other Fellows as sounding boards for personal leadership strategies and dilemmas
- 4) Answer these questions: What have I learned today with respect to the competency/behaviors and in general? How might what I have learned affect my behavior as a person and as a leader?

### **SCHEDULE**

07:00a – 08:30a      **Exercise/Quiet-Reflection Time  
& Breakfast**

08:30a – 09:15a      **Daily Fellow Learning Points**

One minute from each Fellow for:

- (a) one learning point from yesterday
- (b) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point

09:15a – 11:00a      **Session: Moderated Plenary**

**Theme: Ensuring Organizational Accountability –  
Where Personal Ethics and Public Values Intersect**

During this session we will explore what it means to be responsible, not just efficient, as a leader. Fellows will also

be exposed to, and challenged by, issues relating to micro- as well as macro-ethics (and therefore, will be encouraged to think about *compassion* and *stewardship*). The session will be premised by the question: “What can I do to make a difference?” We will also explore the practical difficulties in aligning personal accountability with organisational and/or societal accountability.

Speaker/Moderator: Ambassador James Joseph

11:00a – 11:30a **Refreshment Break and Group Photo**

11:30a – 01:15p **Session: Working Groups**  
Topic: *Assigned Case Study*

Guidelines:

Fellows are divided into four pre-assigned Working Groups. Working Groups are tasked with analysing a Case Study of an ethical dilemma in a hypothetical organisation and resolving the ethical dilemma as a group. Working Groups will make presentations at the afternoon Plenary Session on progress achieved

Note: Key group ideas will be captured by Fellows for display in the afternoon session

01:15p – 02:15p **Lunch**

02:15p – 04:00p **Session: Moderated Plenary**

Topic: *Presentation of Case Studies*

Moderator: Senior Staff

Working Groups will make presentations to the Plenary on Progress Achieved. The discussion should help us to answer the question: what are those principles and practices that help values-based leaders combine ethics and accountability.

04:00p – 05:00p **Personal reflection** – via the Daily Reflection-Learning Log – on the day and its meanings for growth as a leader

05:00p – 06:30p **Discernment Sessions:** Duos or Trios of Fellows share their questions, thoughts, plans with one another, each using the other (one or two) as a feedback/discernment panel, each using the other (one or two) as a feedback panel

## **FREE EVENING**

## **Preparation for the following day:**

- 1) Read “The Conversations We Have,” by Joanne Hunt & Laura Divine, founders and principals of Integral Coaching Canada Inc.
- 2) Review the *Coaching and Mentoring Handbook* and reading assignments re: coaching
- 3) Complete the *Daily Evaluation Form* for submission to Program staff

## **DAY 4 – Tuesday, May 11– Personal Renewal**

### **DAY’S GOALS:**

- 1) Stimulate each Fellow’s learning and growth with respect to the two general competencies and related behaviors associated with this topic
- 2) Continue to encourage deeper personal engagement among Fellows

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Review or learn anew the rationale and the range of strategies for renewal
- 2) Learn how to use a personal coach and select a coach who fits one’s development needs
- 3) Answer these questions: What have I learned today with respect to the competencies/behaviors and in general? How might what I have learned affect my behavior as a person and as a leader?

### **SCHEDULE**

07:00a – 08:30a      **Exercise/Quiet-Reflection Time  
& Breakfast**

08:45a – 09:45a      **Daily Fellow Learning Points**

One minute for:

- a) one learning point from yesterday
- b) one personal behavior that is going to change or be enhanced (briefly say how) as a result of the learning point.

09:45a – 10:45p      **Session: Plenary**

Topic: *The Case of Personal Renewal for Transformative Leaders*

Presentation, Q & A and discussion

Presenter and moderator: Lead Coach

10:45a – 11:00a

**Refreshment Break**

11:00a – 12:30p

**Session: Plenary (continued)**

Topic: *The Case of Personal Renewal for Transformative Leaders (contd.)*

12:45p – 01:45p

**Lunch**

*Cedar Room*

02:00p – 03:00p

**Personal Reflection** – via the *Daily Reflection-Learning Log* – on the day and its meanings for your growth as a leader.

03:00p – 04:15p

**Discernment Session:** Duos or Trios of Fellows share their questions, thoughts, plans with one another, each using the other (one or two) as a feedback/discernment panel

04:30p – 08:00p

**Session: Plenary**

**Introduction to Coaches and Coaching** - Fellows will be introduced to Coaches and coaching as a formal program component and will indicate preferences.

#### **Part I: Introductions**

The Coaches will introduce themselves and explain their approach to coaching, their particular framework and interest in the Program

Facilitated by Lead Coach

#### **Part II: Panel Discussion and Question & Answer Session**

The Program's coaches will provide an inside look at coaching from their experiences with a view to assisting Fellows to consider how they can maximise coaching for their own personal growth as leaders. And the coaches will answer any question Fellows may have about coaching, its goals, strategies and techniques.

Facilitated by Lead Coach

#### **Part III: Fellows and Coaches Mixer**

Fellows are invited to interact with the Coaches at an informal function in order to develop a clearer sense of the coaches, so that each Fellow can identify her/his first three choices for a coach.

#### **Part IV: Determining Preferences**

Fellows finalize and submit the preferences for Coaches

08:00p – 10:00p      **Moderated Dinner and Plenary**

Theme: *Intellectual and Spiritual Renewal*

Moderated Session

Discussion will focus on how leaders keep themselves informed and in touch with new ideas and developments, and emphasize the need for disciplined reading and study outside the scope of one's job, and how to deal with spiritual development and renewal

### **Preparation for following day:**

- 1) Revisit the Assigned *Case Study* and *Group Assignment* for Monday (Hand Out)
- 2) Complete the *Daily Evaluation Form* for submission to Program staff

## **DAY 5 – Wednesday, May 12 – Effective and Ethical Communications**

### **DAY'S GOAL**

- 1) Stimulate each Fellow's learning and growth with respect to the general competency and related behaviors associated with this topic and with the coaching component of the Fellowship.

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Participate with an open-minded attitude in participating in the her/his coaching in-take session.
- 2) Review or learn anew the reasoning behind and promising techniques for pairing ethical and effective communications goals
- 3) Assess how to apply the principles and best practices in resolving one's own communications challenges (within and/or outside one's organization)
- 4) Answer these questions: What have I learned today with respect to the competency/behaviors and in general? How might what I have learned affect my behavior as a person and as a leader?

### **SCHEDULE**

07:00a – 08:30a      **Exercise/Quiet-Reflection Time  
& Breakfast**

**NOTE: MORNING SESSIONS RUN IN PARALLEL**

- 08:30a – 12:30p      **In-take Sessions with Coaches**
- Format: Each Fellow will meet with their selected Coach for a 45 minute in-take session and, thereafter, spend time in Personal Reflection and in Duos or Trios
- 08:30p – 12:30p      **Personal Reflection** – via the *Daily Reflection-Learning Log* – on the day and its meanings for growth as a leader
- Fellow Duos or Trios** share their questions, thoughts, plans with one another, each using the other (one or two) as a feedback panel
- 12:30p – 01:30p      **Lunch**
- 01:30p – 03:30      **Session: Moderated Plenary**
- Theme: *Values and Effective Communications*
- Some would claim that leadership is best understood as a form of human communication – (1) a process, (2) circular in nature, (3) complex, (4) irreversible, and (5) the characteristic that defines the total personality. Effective leaders use symbols to modify the attitudes and behaviors, and appeal to the values, of others in order to reach group goals. During this session, Fellows will be exposed to the importance of communicating through multiple symbolic means and engaging all forms of media to effectively move, inspire, align and motivate people to the value-based society they desire. Leadership effectiveness, as will be seen, depends on our willingness to communicate honestly, as well as on developing effective communication skills.
- Moderator: TBA
- Resource Persons: TBA  
Question & Answer/Discussion Session
- 03:30p – 03:45p      **Introduction to Group Work**
- 03:45p – 04:00p      **Refreshments**
- 04:00p – 05:30p      **Session: Resumption of Working Groups**  
Topic: *Assigned Case Study*
- Guidelines:
- Working Groups to examine the communication challenges raised by the Case Study. Each group is required to develop a values-based “solution” to these challenges. Working Groups will make presentations on their progress at the 05:30 session.

Note: Key group ideas will be captured on flip charts by one or members of each group for display in following session

05:30p – 07:00p

### **Plenary Session**

Reports by Working Groups and Discussion

Moderated by TBA

Each group will make five-seven minute presentation of its key recommendations. The moderator will offer comments on the presentations and help the whole group answer the question: what are those principles and practices that help values-based leaders combine ethics and communications strategies and tactics effectively.

08:00p – 10:30p

### **Dinner – An Evening of Poetry, Song and Storytelling**

Introduced by Program Staff

We will have a selection of poetry at each table, but also invite you to bring any original works you would like to share with the group. And we'd love hearing you sing or dance or play an instrument as well. This is a time for heeding or finding our creativity – an essential feature of servant leadership.

### **Preparation for following day:**

- 1) Complete the *Daily Evaluation Form* for submission to Program staff
- 2) Review Fellowship materials and assignment on social equity and on public policy advocacy

## **DAY 6 – Thursday, May 13 – *Public Advocacy for Social Justice***

### **DAY'S GOAL**

- 1) Stimulate each Fellow's learning and growth with respect to the general competency and related behaviors associated with this topic

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Review or learn anew the reasoning behind, and promising techniques for, engaging thoughtfully on behalf of social equity in Louisiana
- 2) Assess how to apply the principles and best practices of planning with others a public advocacy campaign to influence public policy on behalf of social equity

- 3) Answer these questions: What have I learned today with respect to the competency/behaviors and in general? How might what I have learned affect my behavior as a person and as a leader?

## **SCHEDULE**

07:00a – 08:30a      **Exercise/Quiet-Reflection Time  
& Breakfast**

08:45a – 09:45a      **Fellow Learning Points**

One minute for:

- a) one learning point from yesterday
- b) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point.

10:00a – 12:00n      **Session: Moderated Plenary**

Theme: The Legitimacy and Value of Public Policy Advocacy

Whether we work in the public, private or non-profit sector, there are perceived barriers – and some important rules – regarding advocating on behalf of changing the rules (legislation, administrative rules, etc.) that govern our lives. Yet, regardless of profession and standing, each of us is a citizen with personal and collective interests in the fairness of those rules. Thus institutions of all stripes constantly seek to influence how the rules are defined and interpreted. As citizens the challenge, we believe, is decide whether and how we, too, can act individually and in common with others, to make sure that the rules work for all, for the common good. That is what social justice is all about. This session will explore these issues, thus setting the ground –work for the public policy advocacy planning projects required of all Fellows over the course of the Fellowship year.

Moderator: Ambassador Joseph

Resource Persons: TBA

Question & Answer/Discussion Session

12:00p – 01:15p      **Luncheon**

01:15p – 01:45p      **Plenary Presentation**

**Team Assignments and Assignment of Public Policy  
Advocacy Teams**

01:45p – 03:30p      **First Meeting of Advocacy Project Teams**

- 03:30p – 03:45p      **Refreshment Break**
- 03:45p – 05:00p      **Moderated Plenary Session:**
- Reports back from Teams on planning process so far and discussions on ways to ensure good processes and products.
- Moderator: Senior Staff
- 05:00p – 06:30p      **Second Meeting of Advocacy Project Teams**
- 07:00p – 08:30p      **Dinner**
- 08:30p – 10:00p      **Optional Discernment Group work**

**Preparation for following day:** Complete and submit the *Daily Evaluation Form*

## **DAY 7 – Friday, May 14 – Building Supportive Networks and Summing Up**

### **DAY’S GOALS**

- 1) Stimulate each Fellow’s learning and growth with respect to the general competency and related behaviors associated with this topic
- 2) Encourage each Fellow to reflect on the day’s and the week’s learning
- 3) Solicit useful feedback from participants about the effectiveness of the Retreat
- 4) Begin to prepare Fellows for the challenges – and opportunities – of re-entering workplace, home and community with new ideas and perhaps new goals and objectives related to values-based leadership

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Review or learn anew reasons and techniques for building personal networks
- 2) Answer these questions: What have I learned today with respect to the competency/behaviors and in general? How does my learning across the Retreat seem to be summing up? What effect is the Retreat likely to have on me and my leadership efforts – based on personal commitments to growth? How has the Retreat worked well both for me and for Fellows in general? What suggestions would I make for strengthening the Retreat experience for the next class of Fellows?
- 3) Identify potential challenges and opportunities each might expect as she/he returns to work, home and community

### **SCHEDULE**

- 07:00a – 08:30a      **Exercise/Quiet-Reflection Time**

## **& Breakfast**

08:45a – 09:45a

### **Fellow Learning Points**

One minute for:

- c) one learning point from yesterday
- d) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point.

10:00a – 12:00n

### **Session: Panel Discussion**

Theme: *Building Supportive Networks around Causes and Values*

**Panel: TBA, but always drawn from ELP and LaELP Alums**

### **Question and Answer & General Discussion**

Supportive networks play a critical role as the building blocks for creating, sharing and applying organisational knowledge. During this session, Fellows will hear about the importance of individuals associating themselves with others facing similar issues and challenges on an organisations level – particularly in pursuit of causes and shared goals. The social capital that ensues refers to the social resources individuals within a networked community draw upon and provide value to their organisations. These resources manifest themselves in a variety of ways, including reducing the time it takes to locate an expert within an organisation, minimising the costs associated with validating expertise, and reducing the time and effort associated with developing and monitoring an agreement between individuals in an organisation.

Continuous learning and personal sustainability reflects our participation in supportive networks. The networks that matter are not always the most easily identifiable, because they often remain informal – but do share similar work role and/or pursuits, as well as common contexts. During this session, Fellows will hear about the power of such informal (and formal) supportive networks, on a personal level, and how one goes about engaging such networks for the benefit both of ourselves, as well as the network.

Discussion will focus on both aspects of building supportive networks. Fellows are encouraged to think about how they can become resources for one another post the

Retreat. Mentor/s should be able to provide practical input here based on their experiences

12:00n – 01:00p

**Lunch**

01:00p – 03:30p

**Evaluation Time**

Fellows should take this time to review and assess the Retreat with a particular focus on what each has learned about leadership, about self as a leader, about the Fellowship, and about what worked and what didn't (regarding the curriculum, resource persons, pacing, etc. of the Retreat itself.

Please use the End-of-Retreat evaluation as your guide. Better yet, complete the evaluation on-line (MonkeySurvey), copying out your responses **before** clicking on "submit." But, note that, if you want more time to assess the Retreat experience, you have until July to complete and submit the survey on-line. If you choose this option, please do review the evaluation questions relating to what you have learned to this point through your experience as a Fellow and what is working well and what's not. Thank you.

03:30p – 05:00p

**Personal Reflections**

What I have learned of use yesterday and today about working with other leaders, about networking and about my own leadership journey? Looking back over the whole Retreat, what must I do to become a more effective transformative leader? How do I set about to get there?

05:00p – 06:30p

**Session: Moderated Plenary**

Theme: *Summing Up the Week*

Fellows share learning highlights and critique the Retreat experience: what worked and what didn't to stimulate learning? What has it meant for each? Begin thinking, too, about creating an alumni network and connecting with the Fellows from the Emerging Leaders Program (American and southern African)

Staff responds and talks about what's next in the Fellowship.

Moderated by Senior Staff

07:00p – 10:30p

**Celebration Event & Closing Dinner**

*Vermilion Room*

# POST-RETREAT CURRICULUM

## 2010-11

### GOALS

- 1) Maintain a positive, productive relationship between Fellows and both the Center at Duke and the College of Business at Southern in the year between the Opening Retreat (2010) and the Closing Retreat (2011)
- 2) Encourage and support Fellows' continued exploration of their own attitudes, beliefs and behaviors, and their development as values-based leaders – via regular and structured Center/Fellow interactions, assignments, and coaching
- 3) Develop a steady stream of data from Fellows and Coaches about the Program, about Fellows' learning, and about the perceived effectiveness of the coaching component of the Program
- 4) Involve Fellows actively in the on-going evolution of the Effective Leadership Program, including creating an alumni group

### SPECIFIC LEARNING OBJECTIVES

Each Fellow should:

- 1) Engage in each of the assignments below with resolve to develop patterns of thought and the behavioural skills required to become a more effective values-based (transformative) leader
- 2) Provide the sort of on-going, candid information and feedback to the Program that a) you believe will help Program staff maintain what is effective about the Program and improve what is not working so well, and b) provide the kind of information you, yourself, would appreciate hearing from those you serve to improve your own programs and systems

### SUMMARY OF ASSIGNMENTS

1. Develop and maintain a productive relationship with the Coach you have been assigned in order to gain greater clarity and support for meeting personal leadership learning goals
2. Participate in a one-to-one Consultation with a senior staff member about the Program and your experience of it (to be scheduled mid-year)
3. Prepare for and attend the Mid-Year Retreat (October 2010)
4. Work conscientiously and collaboratively with members of your Team in developing its public advocacy planning project (and reporting on progress at the Mid-Year Retreat) and completing the project at least 21 days before the Closing Retreat (April, 2011)
5. Complete 15 Coaching Conversations across the Fellowship Year.
6. Complete two Coach Evaluation Surveys on the Coaching experience.
7. Complete two Coaching Objectives Evaluations with Program Coach (to be scheduled by each Fellow with her/his Coach)
8. Write one 3-5 page personal story regarding your own response to leadership challenges (September '08)
9. Retake the "Self-Assessment" instrument via the Internet twice (July 2010 and February 2011 – see asterisks in Coaching line below)
10. Attend the Closing Retreat (April, 2011).

## Assignments at a Glance

Assignment	Jun	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Coaching – 15 Sessions*	X	X	X	X X	X X	X	X	X X	X	XX	X	
Surveys**		X			X						X	X
Advocacy Project	X	X	X	X	X	X	X	X	X	X	X+	
Mid-Year and Closing Retreats					X						X	
Personal Ldrshp Story				X								
Self-Assessment tool		X								X		
Staff/Fellow Consultations				X					X			

\* Coaching sessions total 15, including the intake session at the Foundation Retreat and an outtake session at the Reunion Retreat; two sessions also will be devoted in whole or in part to “evaluation of coaching outcomes”. Some months will have more than one session (illustrated by double XX’s, but to be determined by mutual consent between Coach and Fellow).

\*\* July = Foundation Retreat Assessment; October/April = Coaching Surveys; and May = End of Year Assessment (includes a section on the Reunion Retreat)

+ Reports on Projects delivered to and at Closing Retreat

## **MID-YEAR RETREAT**

**October 15 – 17, 2010**

**[Place to be Determined – in Louisiana]**

**[NOTE: WHAT FOLLOWS MAY CHANGE SOMEWHAT DEPENDING ON THE KIND OF CONCERNS FELLOWS AS A CLASS SEEM TO BE EXPRESSING ABOUT THE CHALLENGES THEY FACE AS LEADERS. BUT THE FINAL AGENDA IS NOT LIKELY TO BE SIGNIFICANTLY DIFFERENT FROM THIS.]**

### **PRE-RETREAT ASSIGNMENTS**

- 1) Project Teams should agree on their respective mid-year reports – which will be presented and discussed at this Retreat – and submit them to Program staff no later than two weeks before the Retreat
- 2) Take time to personally assess how the Fellowship is working for you as a leader

### **OVERALL RETREAT GOALS**

- 1) Reinforce and extend the lessons about servant leadership
- 2) Strengthen the sense of the Fellowship as a functioning “community of practice”
- 3) Strengthen each Project Team’s advocacy planning effort

### **PRE-RETREAT ASSIGNMENTS**

- 1) Each Fellow should review the Program’s “Summary Overview - Public Policy Advocacy Projects” and assess a) the degree to which the her/his team’ project is moving forward (completion date is April 2009); b) how effectively the team is operating; c) his/her level of engagement in the Project and what that says about her/his own leadership values – in principle and in action; d) what the Team and she/he might do to strengthen the collective effort.
- 2) Each Fellow should assess how the Fellowship is working for you as a leader (considering all the components experienced thus far – readings, Opening Retreat, Coaching, Team Advocacy Project, other interactions with Program staff).

### **OVERALL RETREAT GOALS**

- 1) Reinforce and extend the lessons about servant leadership – particularly renewing self in the face of both ambiguity (about tasks, roles, uses of power) and adversity
- 2) Strengthen the sense of the Fellowship as a functioning “community of practice”
- 3) Advance and strengthen each project team’s advocacy planning effort

## **DAY 1 – Friday, October 15 - *Renewing the Fellowship and the Fellows***

## **DAY'S GOALS –**

- 1) Re-engage Fellows as members of this “place” – the Fellowship community
- 2) Further Fellows’ journey as servant leaders
- 3) Focus Fellows’ attention on the meaning and necessity of self-care and renewal at the “I”, We and It” levels

## **SPECIFIC LEARNING OBJECTIVES**

- 1) Extend other Fellows’ and staffs’ understanding of your commitments, struggles and progress as a transformative leaders, using your experience of the Fellowship to date as data
- 2) Develop a deeper understanding of how to attend to renewal in the face of ambiguity and adversity

## **SCHEDULE**

<b>10:30a – 11:15a</b>	<b>Register for hotel room</b>	
<b>11:15a – 11:45n</b>	<b>Signing in for the Retreat</b>	
<b>11:45p – 01:00p</b>	<b>Luncheon</b>	
	Welcomes and Comments on LaELP’s goals and this Retreat’s agenda	
<b>01:00p – 02:15p</b>	<b>Plenary: Re-introductions of Self</b>	
<b>02:30p – 04:00p</b>	<b>Plenary: Advocacy Groups &amp; Personal Leadership</b>	
	Remarks and Discussion, Moderated by Senior Staff	
<b>04:00p – 04:15p</b>	<b>Refreshment Break</b>	
<b>04:15p – 05:15p</b>	<b>Self-Reflection</b> on personal leadership issues in the context of your advocacy planning group experience	On Your Own
<b>05:15p – 06:30p</b>	<b>Discernment Groups</b>	On Your Own
<b>07:00p – 09:00p</b>	<b>Dinner</b>	
	<b>Leading in Adversity</b>	
	Presentation and Discussion, Moderated by Ambassador Joseph	

## **Preparation for the Following Day**

- 1) Review your assessment of your Team’s Public Policy Advocacy Project (see Pre-Retreat Assignment 1, above)

## **DAY 2 – Saturday, October 16 - Developing and Reporting on Advocacy Planning Projects**

### **DAY'S GOALS**

- 1) Encourage team and project development via helpful feedback
- 2) Assess, collectively, the value of team projects and whether/how to strengthen and/or make them more valuable to Fellows

### **SPECIFIC LEARNING OBJECTIVES**

- 1) Engage in collaborative assessment and further development of team's project in ways that use the leadership talents and contributions of all its members
- 2) Report on the project in ways that deepen listeners' and your own understanding of its dynamics and potential for contributing to social justice, and on the challenges posed in developing it as an in-service Fellow
- 3) Listen to presentations from other teams with an equal commitment to understanding their purposes and to offering helpful feedback and suggestions

### **SCHEDULE**

**07:30a – 08:30a**      **Breakfast**

**08:45a – 09:30a**      **Plenary: Fellows' Learning Points**

One minute from each Fellow for:

- a) one learning point from yesterday
- c) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point

**09:30a – 12:30n**      **Teams' Work Sessions**

Assessing and improving the process and the product

**10:15a – 10:30a**      **Refreshment Break**

**12:30p – 01:30p**      **Luncheon – informal**

**01:30p – 03:00p**      **Plenary Session:**

Moderated Discussion of Team Projects

Each Team will review for the Fellowship the highlights, Challenges, and prospects of both the content and the process of its work in planning a public policy advocacy project. The Teams will use the other Fellows as sounding board and resources, requesting help (if any) they would most like from the larger group.

The Fellowship as a whole will address and discuss these questions: How are the projects working as leadership learning laboratories for Fellows and, if not, what needs to change? Is social justice possible to achieve by meaningful measure in Louisiana? Can our planning projects be useful agents for such change?

<b>03:30p – 04:30p</b>	<b>Personal Reflection</b>	On Your Own
<b>04:30p – 06:00p</b>	<b>Discernment Groups</b>	On Your Own
<b>06:30p – 09:00p</b>	<b>Dinner or Reception/Buffer</b>	

### **Preparation for the Following Day**

- 1) Consider how you think your team’s advocacy planning project can be advanced, in light of today’s discussions
- 2) Review your own journey as a leader who is thinking about/trying to incorporate the values of servant leadership into you thinking and actions – and how the Program is/is not facilitating that personal work

## **DAY 3 – Sunday, October 17 - Personal and Program Assessment**

### ***DAY’S GOALS***

- 1) Provide space and time for each advocacy planning team to advance its work by integrating learning from Day 2’s sessions on that work
- 2) Solicit useful feedback from participants about the effectiveness of the Retreat

### ***SPECIFIC LEARNING OBJECTIVES***

- 1) Using the policy planning teams as laboratories not only for addressing critical social justice issues but also for sharpening each team member’s leadership skills and abilities to be a generative participant.
- 2) In the session on personal feedback, work to answer these questions: How does my learning through across the Fellowship experience as a whole to this point seem to be summing up? In particular, what have I learned in this Retreat with respect to leadership competencies/behaviors that are important to me? What effect is this Retreat likely to have on me and my leadership efforts and on my team’s project? What suggestions would I make for strengthening the Fellowship experience to date, including this Retreat, for the next class of Fellows?

### **SCHEDULE**

<b>07:30a – 08:30a</b>	<b>Breakfast</b>
<b>08:30a – 09:15a</b>	<b><i>Daily Fellow Learning Points</i></b> One minute from each Fellow for:

- d) one learning point from yesterday
- e) one personal behaviour that is going to change or be enhanced (briefly say how) as a result of the learning point

**09:15a – 10:30a      Team Meetings:**

In the light of yesterday's work and feedback/discussion on the team projects as leadership learning labs, Teams will meet again to develop further their plans, timelines, strategies, etc.

**10:30a – 10:45a      Refreshment Break**

**10:45a – 12:00n      Moderated Plenary:**

Fellows will provide feedback about their own learning (as each feels moved to do so) and about the Program – its influence, its structure, requirements, etc. Plenary will also include a discussion location of end-of-year Retreat.

Moderated by Ambassador Joseph

**12:00n – 01:30p      Closing Luncheon/Discussion**

**End of Retreat**

# **REUNION RETREAT**

## **April 3-7, 2011**

[What follows may be tweaked, but is likely to be very similar, if we have resources to take the Fellowship to Cape Town, South Africa for this Retreat. Alternatively, if we use an American venue – in an iconic city during the Civil Rights Movement, we will retain the substance of plenary sessions and develop appropriate alternative site visits.]

### **PRE-RETREAT ASSIGNMENTS**

- 1) Revisit the *Intellectual Context and Sought Competencies* document.
- 2) Revisit the *Four Key Skills & Set of Guidelines* document.
- 3) Revisit the *Discernment Process: a Guide to Fellow/Mentor Duo or Trio Sessions*
- 4) Complete the *Self-Assessment Tool on Leadership Behaviors* (Online). Compare the results with your Pre and Mid-Program self-assessments, and bring the results with you for use during the Retreat.
- 5) Complete the “Resolving Leadership Issues” Assignment online
- 6) Complete the *Self-Reflection and Personal Planning Document*

### **OVERALL RETREAT GOALS:**

- 1) Stimulate each Fellow’s summary reflections about what she/he has learned and how he/she and her/his leadership behaviors have changed as a result of the participation in the Program
- 2) Reinforce key concepts central to transformational leadership
- 3) Get candid feedback from Fellows about each component of the Program
- 4) Encourage active commitment on the part of as many Fellows as possible to active intra-group networking and mutual support (ELP and EL), pursuit of policy advocacy project goals, and support of the Program, post-Fellowship year

### **DAY 1 – Sunday, April 3 – Getting Re-acquainted**

#### **DAY’S GOAL:**

- 1) Re-build the sense of “the fellowship” among Fellows and staff.

#### ***SPECIFIC LEARNING OBJECTIVES***

- 1) The Fellowship should: Celebrate one another’s company and the personal progress each has made as a human being.

### **SCHEDULE**

17h30 – 18h00 <sup>1</sup>	Register for the Retreat
18h00 – 19h15	Reception & Light Dinner

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<sup>1</sup> We use “military time” because it is more commonly used in South Africa for events than in the United States. To be sure that you know what time thins are post-noon simply subtract 12 from any time from 13h00 – 24h59.

- 19h15 – 19h30 Welcome and Announcements
- 19h30 – 21h30 Plenary

Theme: *Reflections on the Leadership Year*

Each Fellow takes four minutes to tell the story of her/his past year in terms a) of the most important lessons he/she has learned as a leader and b) the most important piece of wisdom she/he would like to pass on to other Fellows

Staff reflects on what the past year’s experience of the Fellowship has meant to them and for the Program

**Preparation for the Following Day**

- 1) Review reading assignments for this Retreat

**DAY 2 – Monday, April 4 – *Cape Town as a Microcosm of Post-Apartheid South Africa***

**Goals**

- 1) Develop an understanding of the economic and social context of today’s South Africa

***SPECIFIC LEARNING OBJECTIVES***

- 1) Each Fellow should: experience both Cape Town’s grandeur and the harsh economic realities which so many of its citizens experience daily

**SCHEDULE**

- 06h45 – 07h45 Breakfast
- 08h00 – 08h45 Plenary on the social and economic context of Post-Apartheid South Africa  
  
Presentation by Ambassador James A. Joseph
- 08h45 – 09h00 Board Bus for Cape Town Tour
- 09h00 – 15h00 Tour of Cape Town – District Six Museum, Cape Flats and Black Townships with luncheon  
  
Tour leader: TBA
- 16h00 – 18h00 Plenary

Theme: *Discussion of the Tour's Experience: Contrast and Similarities to Issues of Social Equity in Louisiana*

Moderator: Ambassador James A. Joseph

Resource Persons: TBA

18h00 – 19h00 Discernment Group Meetings

19h30 – 21h00 Informal Dinner

### **Preparation for the Following Day**

- 1) Review reading assignments for the Retreat
- 2) Consider what you want to learn about leadership from visiting Robben Island

## **DAY 3 – Tuesday, April 5 – The Robben Island Experience on Leadership in Transformation**

### **DAY'S GOALS:**

- 1) Reinforce in Fellows and other participants a sense of the calling, requirements and the potential of transformative leadership
- 2) Introduce Fellows and other participants to the context and environment for learning
- 3) Advance the process of building a personal sense of “the Fellowship” and of its participants

### **SPECIFIC LEARNING OBJECTIVES**

Each Fellow should:

- 1) Actively and reflectively examine the personal relevance of leadership behaviors of Mandela and others during their Robben Island imprisonment.
- 2) In addition, given that Robben Island was mainly a prison for men, Fellows should reflect on the “larger struggle” and the role of Women, Whites, Exiles, and Others – and think on what effect their personal stances, behaviors and actions had, and still have, on shaping their communities and transforming their countries
- 3) Learn something important about each other Fellow, and note this in the *Daily Reflection-Learning Log* provided
- 4) Answer the following questions in your provided *Daily Reflection-Learning Log*:  
What have I learned today? How might what I have learned affect my behaviour as a person and as a leader?

### **SCHEDULE**

06h45 – 07h45 Exercise/Quiet-Reflection Time & Breakfast at each participant's own ordering

08h00 Taxis to Nelson Mandela Gateway Museum

08h30 Boarding the Boat to Robben Island

09h30 – 12h30	Private tour of the Robben Island Prison and Island
13h00	Boat departs Robben Island
13h30	Walk and/or Taxis back to GSB
13h45 – 14h45	Lunch
15h00 – 16h00	Personal Reflection Time on the Experiences of the Cape Town and Robben Island
16h00 – 17h00	Session: Discernment Group Meetings to reflect on Robben Island  Theme: <i>What the Robben Island Experience Tells Each of Us about Leadership as a Transformative Journey</i>  Each discernment group should address the following issues: 1. What does Robben Island, generally, have to teach us as leaders? 2. What is/are the specific lesson(s) of the experience for each member of the Discernment Group?
17h00 – 19h00	Session: Moderated Plenary with Presentations & Discussion  Theme: <i>The Role that Struggle Plays in the Development of Values and How Those Values Apply to Leadership Roles Today</i>  Resource Persons: TBA Moderator: Ambassador James A Joseph
19h30 – 21h30	Dinner

### **Preparation for the Following Day:**

- 1) Review the *Self-Reflection & Personal Planning* document
- 2) Identify the most important leadership ideas that you learned as a result of the plenary reflections (to share in tomorrow's opening session)
- 3) Review your Team's presentation of its Advocacy Plan

## **DAY 4 – Wednesday, April 6 – *Assessing Planning Projects and Personal Leadership Growth***

### **DAY'S GOALS:**

- 1) Come to a satisfactory closure (at least for the interim) for each of the public policy advocacy projects

- 2) Give Fellows more information relevant to their journeys as servant or transformative leaders by placing their journeys so far into a broader context of their journeys as leaders so far

### **SPECIFIC LEARNING OBJECTIVES:**

Each Fellow should:

- 1) Participate actively in the presentation of your own Team's presentation and critique
- 2) Begin to decide whether/how to pursue the advocacy projects or at least their objections post-Program
- 3) Participate actively in the creatively developing her/his *Personal Leadership Journey Map* and considering how it can inform the journey going forward

### **SCHEDULE**

06h45 – 07h45	Exercise/Quiet-Reflection Time Breakfast at each participant's own ordering
08h00 – 08h45	<p><b><i>Daily Learning Points</i></b></p> <p>Senior staff will facilitate a session, the purpose of which is to aid Fellows in reflecting on their respective lessons from previous day's events, thinking about how that learning might restructure understanding and behaviour, and preparing for the day's events and activities.</p>
09h00 – 11h00	<p><b><i>Presentations and Critiques of Final Advocacy Plans</i></b></p> <p>Plenary Session</p> <p>Moderated by Senior Staff</p>
11h00 – 11h15	Refreshment Break
11h15 – 12h15	<p><b><i>Assessing Learning from the Advocacy Planning Process</i></b></p> <p>Plenary Session</p> <p>Moderated by Senior Staff</p>
12h30 – 13h30	Lunch
13h45 – 14h15	<p><b>Session: Leadership Mapping: Introduction to the Goals and Process</b></p> <p>Led by Senior Staff</p>
14h15 – 15h00	Individual Mapping and return to the group session
15h15 -15h30	Group Photograph

15h30 – 16h30	<p>Session: <b>Leadership Mapping in the Context of the Program</b></p> <p>Theme: How participation in ELP – with reference to the Program’s curriculum and its emphasis on sought competencies for servant leadership – fits within the arc of Fellows’ respective leadership history</p> <p>Facilitated by Senior Staff</p>
16h30 – 16h45	Refreshment Break
16h45 – 18h00	Sharing Lessons of the Day with Discernment Group
18h30 – 21h00	Informal Fellowship Dinner

**Preparation for the Following Day:**

- 1) Identify the most important leadership ideas that you learned as a result of today’s discussions and personal reflections/planning – to share in tomorrow’s opening session.
- 2) Review your personal growth plan in light of your experiences in this Retreat and the lessons you take away from the “Leadership Mapping” exercise.
- 3) Begin to think about whether/how you and members of your team might pursue the advocacy project or its goals.

**DAY 5 – Thursday, April 7 – *Personal Growth Planning, Collaborative Problem Solving and Fellowship Wrap-up***

**DAY’S GOALS:**

- 1) Reinforce each Fellow’s sense of the calling, requirements, required resources and potential of transformational leadership
- 2) Encourage Fellows to test and, if necessary, improve upon their respective personal growth plans.
- 3) Encourage Fellows to provide candid feedback and suggestions for improvement about the Program and its individual components.
- 4) Encourage Fellows to commit to continuing involvement to the Program and to one another in the future.

**SPECIFIC LEARNING OBJECTIVES:**

Each Fellow should:

- 1) Reflect on the original Terms of Participation and other key documents of the program, including any personal leadership growth plans you may have developed this year
- 2) Answer these questions:
  - What are the most important learning/lessons I take away from my participation in this Program over the past year?
  - How have I changed as a person and a leader as a result of these lessons and experiences?
  - What else has occurred in my life that has reinforced, got in the way of, or enhanced my growth as a person and leader?

- In what ways do I most need to change to meet my aspirations as a values-based leader?
  - What does the experience of this Fellowship teach me about how to use other leaders in reciprocal ways as resources
- 3) Use the session on and process for “Resolving Leadership Issues” as vehicles for further growth as an effective leader
  - 4) Provide honest feedback to program staff – and to one another – about the value and shortcomings of the Fellowship experience in terms of one’s own learning and of the program’s components, structure, content and processes

## SCHEDULE

07h00 – 08h00      Exercise/Quiet-Reflection Time & Breakfast – at each participant’s own ordering

08h15 – 09h15      Session: *Personal Planning Time*

**Each Fellow devotes this time to creating or, if it already exists, reviewing and, in the light of the Retreat’s experience, modifying if necessary, her/his own personal growth plan as a values-based, servant leader. How do you want to “be” as a leader? What principles will guide you? What have you learned about yourself that you want to honor and build on? What have you learned about yourself that you want to curb or change?**

09h15 – 09h45      Session: *Daily Learning Points*

09h45 – 10h00      Refreshment Break

10h00 – 13h00      Session: Plenary Discussion

**Theme: *Resolving Leadership Issues***

Based on Fellow’s own descriptions of “leadership dilemmas” they are now facing or have resolved recently, program staff have defined several universal dilemma themes or categories, which they will pose to the entire Fellowship for resolution – relevant ideas, experiences, etc.

Moderated by Senior Staff

13h00 – 14h00      Lunch

14h00 – 15h00      ***Reflections on the Program***

Each Fellow reviews his/her experience as a Fellow in this Program in preparation for the next session: “Program Feedback.” What has stood out in the Fellowship experience this past year? What especially has worked well for you? What has not worked so well? What might have made it a better experience? And, equally

important, how might you be willing to commit to the Fellowship community in the future?

15h00– 15h15 Refreshment Break

15h15 – 17h15 Session: ***Retreat and Program Feedback***

Fellows and staff meet to give, hear and reflect on feedback about the Retreat and, particularly, about the Program as a learning experience (especially Coaching), and about commitments to the Fellowship community.

Moderated by Senior Staff

18h30 – 20h30 ***“In Celebration” Closing Reception/Light Dinner***

Fellows, staff, coaches, family and friends gather for a Certification Ceremony to celebrate the 2010/11 Class of the Effective Leadership Fellows and the conferring of Life Fellowship upon Fellows