**PM-2: Project Teams, Leadership, and Communication**

**Course Description:**

This course provides students with comprehensive knowledge and skills in project teams, project leadership, project communications, and stakeholder engagement. They will master theoretical and applied skills in planning, distributing, and managing project communication; identifying and engaging stakeholders; analyzing and interpreting project organization and context; and applying best practices in project team management.

The following are the high-level learning goals for the course. At the successful completion of the PM-2 Course, students will be able to:

1. Describe how project purpose, organizational structure, culture, roles, and knowledge management impact their ability to lead a project team.
2. Identify, recognize, and engage both internal and external project stakeholders.
3. Explain roles of team members and how they contribute to projects, and apply an understanding of self in how they relate to teams.
4. Apply knowledge of team building, operation, and behavior, considering factors that influence effectiveness for all types of teams, including those that are virtual and global.
5. Identify and apply an appropriate communication strategy for a given situation.
6. Analyze power dynamics and organizational politics, and suggest conflict management and negotiation techniques relevant to the project.
7. Apply critical and innovative thinking skills to improve their own, and others’, decision-making processes within projects.
8. Describe and relate basic leadership principles and processes to address leadership issues and to remove obstacles in the project environment.
9. Describe the organizational change management process and encourage behavior to maximize project success.
10. Describe underlying ethical principles, which should be applied to managing projects, and demonstrate ethical sensitivity for a given situation.

**Relevant KMs:**

PM-2 draws topics extensively from the following behavioral knowledge modules (see Volume I):

- Plan, Distribute, and Manage Project Communications (B-DC)
- Project Team Building and Motivating (B-TB)
- Project Leadership (B-PL)
- Identifying and Engaging Stakeholders (B-SE)
- Project Organization and Context (B-OC)
- Managing Global Projects (B-GP)
- Virtual Project Management (B-VP)
- Ethics and Professionalism (B-EP)
PM-2: Course Content Outline

The following sections list the recommended sequence of major topic areas of the course, including instructional goals, associated content topics, and the learning outcomes that can be expected for each:

PM CONTEXT

Goal: Students will describe how project purpose, organizational structure, culture, roles, and knowledge management impact their ability to lead a project team.

- Project Purpose and Alignment
- Organization
- Cultural Context and Layering of Cultures
- Characteristics of Large Global Projects
- The Role of Knowledge in Projects

Learning Outcome

LO1: Assess and document the contextual linkages between the parent organization and the project, and formulate approaches to project execution methods, roles, responsibilities, and relationships.

PROJECT STAKEHOLDERS

Goal: Students will be able to identify, recognize, and engage both internal and external project stakeholders.

- Identifying Stakeholders
- Analyzing Stakeholders

STAKEHOLDER ENGAGEMENT

- Evaluating Stakeholder Relationships and Engagement
- Development of Stakeholder Trust
- Mobilize/Engage
- Mitigating Risks
- Dealing with Resistance
- Communicating
- Getting Feedback/Listening
- Managing Perceived Benefits
- Negotiating with, and Influencing, Stakeholders

Note: In our course outline, the above Stakeholder Engagement topics are introduced only after the teamwork concepts are introduced.

Learning Outcome

LO2: Analyze stakeholder influence, interest, priority, and engagement, and create a stakeholder management plan.
INDIVIDUAL AS TEAM MEMBER

Goal: Students will be able to explain roles of team members and how they contribute to projects, and apply an understanding of self in how they relate to teams.

- Understanding Self
- Role of Team Member—individual and collective
- Presence Management

Learning Outcomes:

LO3: Demonstrate awareness of diversity of roles, backgrounds, and personal competencies, including emotional intelligence and strengths among team members.

LO4: Reflect upon personal strengths and weaknesses, and develop a plan for continuous improvement with respect to team skills.

TEAMWORK

Goal: Students will apply knowledge of team building, operation, and behavior, considering factors that influence effectiveness for all types of teams, including those that are virtual and global.

- Project Teams
- Team Building
- Managing Global Teams and Networks
- Managing Virtual Teams

Learning Outcomes:

LO5: Reflect upon the formation and motivation of teams and the dynamics of teamwork to plan and build teams for successful projects.

LO6: For projects with multiple cultures and languages in large-scale, global environments across time zones, recommend appropriate approaches for managing communications, teams and their motivation, meetings, cross-functional teams, matrix management, and virtual team environments.

LO6X: (Optional) Given a specific project context and plan that specifies a virtual team in a cross-cultural project environment, formulate plans for communication and project integration that will define how the project manager and others will employ tools, methods, and approaches to best deal with the issues of managing the project with a virtual project team.

PROJECT COMMUNICATION

Goal: Students will be able to identify and apply an appropriate communication strategy for a given situation.

- Communication Models
- Communication Processes
- Appropriate Communication Styles
- Types of Communication
• Levels of Communication
• Target Audience
• Develop, Execute the Project Communication Plan, and Evaluate the Effectiveness of Project Communication

Learning Outcomes:

   LO7: Describe and evaluate factors that influence the target audience communication preferences and styles and adapt communications approach to optimize message delivery and comprehension.
   LO8: Select and contrast the application of various communications mediums based on the intended message and the project team composition and structure (i.e., cultural diversity, geographic location, and technological acumen).

POWER AND POLITICS

   Goal: Students will be able to analyze power dynamics and organizational politics, and suggest conflict management and negotiation techniques relevant to the project.

   • Power and Influence
   • Politics
   • Conflict management—internal to team versus external stakeholders
   • Negotiation

Learning Outcomes:

   LO9: Describe power dynamics and political factors influencing behavior and analyze their likely effects on project outcomes
   L10: Given a project situation, choose suitable conflict management and negotiation strategies.

DECISION MAKING

   Goal: Students will apply critical and innovative thinking skills to improve their own, and others’, decision-making processes within projects.

   • Decision Biases
   • Decision Processes
   • Problem-Solving Techniques; Innovative approaches (e.g., DeBono’s thinking hats)
   • Communicating Decisions

Learning Outcomes:

   L11: Demonstrate knowledge of decision-making models, assumptions, and biases, and their impact as they relate to project situations.
   L12: Apply decision-making models, involving decision processes, problem-solving and innovation techniques typically used in projects, considering key decision-making influences and linkages between organizational and project-level issues.
LEADERSHIP

Goal: The student will be able to describe and relate basic leadership principles and processes to address leadership issues and to remove obstacles in the project environment.

- Basic Leadership Principles
- Key Processes/Activities
- Leadership Issues
- Self-Assessment of Leadership (see Individual as Team Member)

Learning Outcomes:

LO13: Recognize and describe the different leadership principles and processes used to solve a project issue.

LO14: Given a project issue or obstacle that may involve multicultural, intergenerational, hierarchical, and virtual teams, describe which leadership principles and processes will best motivate and develop leadership in others while removing issues.

LO15: Analyze leadership principles and processes and design a leadership strategy that defends the use of those principles and processes to solve a leadership issue involving multicultural, intergenerational, hierarchical, and virtual teams, which result in a more motivated team.

LEADING CHANGE MANAGEMENT

Goal: Students will be able to describe the organizational change management process and encourage behavior to maximize project success.

- Change Process Management
- Change Leadership—the role of the PM

Learning Outcome

LO18: Given a specific situation, apply organizational change management principles to maximize successful achievement of project objectives.

ETHICS AND PROFESSIONALISM THROUGH THE PROJECT LIFE CYCLE

Goal: Students will be able to describe underlying ethical principles, which have to be applied to managing projects, and demonstrate ethical sensitivity for a given situation.

- Principles- and Values-Based Ethics
- Global Ethics
- Ethical Justification of Behavior
- Ethical Leadership
- Legal Issues
- Remaining Aware of Global Social Responsibility
- Whistleblowing and Accountability
- Examples of Existing Codes of Conduct

Learning Outcomes:
LO16: Evaluate and assess the importance of ethics and professionalism in every aspect of the project’s operation, and examine the factors that influence moral conduct.

LO17: Given a project scenario involving ethical considerations, determine how a project can be executed according to ethical principles and issues of global social responsibility.

General Pedagogical Approach to PM-2

The course is designed to develop behavioral competency through delivery of fundamental conceptual information, followed by supervised practice with feedback. This type of pedagogy helps students to build concepts through application—a key point in the development of behavioral skills. When the behavior being learned is that of client interaction, for example, one can envision multiple approaches that would allow an instructor to assess student learning in this complex area. One of the greatest challenges is that of stimulus transfer—enabling the student to react appropriately to triggers outside of the classroom that should stimulate certain behaviors. It is one thing to teach a student the concept of “professionally reacting to an angry stakeholder through maintaining professional decorum, and so on.” However, the student needs to not only identify such a situation, but they must also know how best to react under those conditions to maintain the client relationship and achieve positive results for the tasks at hand. While the student could recite correctly what they would do in each situation if asked on an exam, the real stimulus transfer will be complete when the student responds properly during the real interaction outside of the classroom. Such preparation occurs best through giving the student the opportunity to demonstrate this in an environment comparable to what they will encounter in the field. Therefore, the opportunity for students to engage in an experience, rather than to simply describe the actions that are supposed to be taken during such an interaction, is best instructional practice whenever feasible.

Therefore, the course includes numerous controlled opportunities for students to experience some degree of the actual scenarios that are common in the field, through case problems and discussions, experiential learning in the context of managing short-range, simple projects for real organizations, or simulations done under conditions that can come close to the real thing but that can remain relatively “safe.”

Other information to be learned and assessed, such as terms, definitions, lists, or short vignettes or situations, can be measured through written testing, where such instruments stimulate recall of discrete information. Therefore, even in a course where experiential learning is predominant, the written test or exam can still be very appropriate to measure such recall.
Chapter III-2: Course Schedule

Course Session Sequence

In this section, we provide the list of topics to be covered in the course. Table III-2-1 lists the topics, the associated subtopics, and homework assignments. Topics are referred to as “session topics,” as they could be covered in a single or multiple lectures and in detail.

Each row of the table contains the session topics and subtopics.

Typical learning assessment topics are also listed. These can be implemented as in-class discussions or homework assignments, and may be organized for individual or team activity depending upon the nature of each.

Table III-2-1: Session-topics outline for the PM-2 course

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<thead>
<tr>
<th>Week</th>
<th>Session Topic</th>
<th>Subtopics</th>
<th>Choices for Assessments/Activities</th>
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<tbody>
<tr>
<td>1A</td>
<td>Project Purpose and Alignment</td>
<td>• Why before what</td>
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<td></td>
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<td>• Projects as strategy alignment or implementation</td>
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<td>• Organizational agility</td>
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<td>• Benefits realization and outcome</td>
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<td>• Risk tolerance</td>
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<td>• Identifying complexity—factors and issues</td>
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<td>1B</td>
<td>Project Organization</td>
<td>• Temporary versus permanent</td>
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<td>• Organization structure, roles, decision making, power relationships, and matrix management</td>
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<td>• PMO structure and function</td>
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<td>• Portfolio and program management</td>
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<td></td>
<td></td>
<td>• Project organization and PM roles</td>
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<tr>
<td>Week</td>
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| 2A   | Cultural Context and Layering of Cultures | • Team  
• Business unit sponsor  
• Organization  
• Industry  
• Geography—team/and project location | Given a scenario for a project, identify the organizational and cultural characteristics and linkages of the project to the PMO and the organization. |
| 2B   | Characteristics of Large Global Projects | • Identifying risk and complexity in large global projects  
• Logistics, distance, time zone, jurisdiction challenges, and language  
• Understanding diversity | • Scenario analysis of global project |
| 3    | The Role of Knowledge in Projects | • Culture of knowledge capture, sharing, use; Lessons learned  
• Extending wisdom through collaboration/trust  
• Tools, project Repositories  
• Visualization—search and find | • Case study (use of knowledge management) with focus on assessment and lessons learned |
| 4A   | Identifying Stakeholders | • Internal/External  
• Stakeholder maps  
• Customers as stakeholders  
• Champions and sponsors | • Project scenario (case study, problem case, summary of existing project, experiential situation, information from interviews, etc.) from which the student develops a stakeholder management plan. |
| 4B   | Analyzing Stakeholders | • Priorities/Impacts/Values  
• Methods to gather information about stakeholders  
• Analysis and classification—scope/impact, timing, and visibility  
• Value: What do they value?; The challenge of projection bias | • Project scenario (case study, problem case, summary of existing project, experiential situation, information from interviews, etc.) from which the student develops a stakeholder management plan. |
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<tbody>
<tr>
<td>5</td>
<td>Individual as Team Member</td>
<td>• Understanding self &lt;br&gt; o Self-awareness &lt;br&gt; o Emotional intelligence &lt;br&gt; o Individual learning styles &lt;br&gt; o Leadership is everywhere—individual leadership style &lt;br&gt; • Role of team member—individual and collective &lt;br&gt; o Diversity and cultural awareness &lt;br&gt; • Presence management &lt;br&gt; o Reflexivity &lt;br&gt; o Self-management (stock taking)</td>
<td>• Scenario: Identify issues in awareness of diversity of roles, backgrounds, and personal competencies, including emotional intelligence and strengths among team members &lt;br&gt; • Assess personal strengths/weaknesses and develop a plan (e.g., Myers/Briggs instrument)</td>
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<tr>
<td>6A</td>
<td>Project Teams</td>
<td>• Types of teams (distributed, collocated, virtual, global, and self-managed) &lt;br&gt; • Team management &lt;br&gt; • Team meetings &lt;br&gt; • Difficulties with working in teams &lt;br&gt; • Team learning</td>
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<tr>
<td>6B</td>
<td>Team Building</td>
<td>• Processes, challenges, and barrier in the team context &lt;br&gt; • Defining high-performance project teams &lt;br&gt; • Team member engagement &lt;br&gt; • Role of PM in team development, composition, formation, and closeout &lt;br&gt; • Development of expertise</td>
<td>• Assignment to analyze and develop plan (e.g., kickoff meeting) &lt;br&gt; • Exam</td>
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<tr>
<td>7A</td>
<td>Managing Global Teams and Networks</td>
<td>• Leading and managing virtual teams</td>
<td>• Scenario analysis</td>
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<td>• Managing interorganizational relationships</td>
<td>• Ethnographic study</td>
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<td>• Cross-cultural awareness and sensitivity</td>
<td>• Given a rubric for teamwork, extend it for a specific situation, including global and virtual project settings</td>
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<tr>
<td>7B</td>
<td>Managing Virtual Teams</td>
<td>• The roles of, and effects of, tools in virtual PM</td>
<td>• Reflect on individual experiences from a real-world project situation</td>
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<td>• Being aware of tools and opportunities and difficulties using tools that support virtual teams; mapping tasks to virtual tools</td>
<td>• Project simulation software</td>
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<td>• Addressing social attributes</td>
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| 8    | Communication—Part 1           | • Communication models  
• Communication processes  
  o Channels and media  
  o Cross-cultural communication  
  o Individual communication styles—knowing your own and recognizing others  
  o Potential communication barriers and resolution  
  o Influence of complexity  
• Appropriate communication styles  
  o Appreciative/reflective/humble inquiry/adaptive  
  o Two-way effective listening  
  o Collaboration  
• Types of communication  
• Levels of communication | • Exam  
• In-class exercise regarding positive and negative examples of effective communication  
• Experiential awareness exercises regarding communication styles, active listening, nonverbal communication, and related concepts |
<p>| 9A   | Communication—Part 2           | • Target audience                                                     | Scenario: Audience analysis (could be a crisis scenario)                                          |</p>
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<tr>
<td>9B</td>
<td>Stakeholder Engagement</td>
<td>• Evaluating stakeholder relationships and engagement&lt;br&gt;• Development of stakeholder trust&lt;br&gt;• Mobilize/Engage&lt;br&gt;• Mitigating risks&lt;br&gt;• Dealing with resistance&lt;br&gt;• Communicating&lt;br&gt;• Getting feedback/listening&lt;br&gt;• Managing perceived benefits&lt;br&gt;• Negotiating with, and influencing, stakeholders</td>
<td>• Experiential Learning—possible project scenario in which the sponsor evaluates the student on these items&lt;br&gt;• Vignettes: Analyze and recommend approaches&lt;br&gt;• Simulation</td>
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<td>9C</td>
<td>Communication Planning</td>
<td>• Develop, execute the project communication plan, and evaluate the effectiveness of project communication</td>
<td>• Scenario: Prepare a project communication plan</td>
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<tr>
<td>10A</td>
<td>Power/Politics</td>
<td>• Power and influence&lt;br&gt;  o Types of power&lt;br&gt;  o Sources of power&lt;br&gt;  o Power differentials (e.g., roles, status, organization level, gender, racial)&lt;br&gt;• Politics&lt;br&gt;  o Factors influencing political behavior&lt;br&gt;  o Political tactics&lt;br&gt;• Conflict management—internal to team versus external stakeholders&lt;br&gt;  o Thank you for arguing&lt;br&gt;  o Issue management&lt;br&gt;  o Constructive confrontation&lt;br&gt;  • Negotiation</td>
<td>• Exam&lt;br&gt;• Vignette: Identify issues and impacts&lt;br&gt;• Case study/Scenario&lt;br&gt;• How to argue&lt;br&gt;• Role playing</td>
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| 10B  | Decision Making—Part 1 | • Influences on decision making  
  o Authority and stakeholders  
  o Time pressure  
  o Information credibility and availability  
  o Intuition and data-driven decisions  
  o Bounded rationality, ambiguity, sensitivity, and complexity  
  • Decision biases  
  o Groupthink  
  o Cognitive biases  
  o Emotional biases | • Exam  
  • Class exercises in thinking hats, and so on; timed exercises with situational constraints  
  • Case study involving ethics and negotiations  
  • Scenario: Evaluate behavior of stakeholders as per established choices and the consequences of those choices (legal, cultural, etc.) and discussion |
| 11A  | Decision Making—Part 2 | • Decision processes  
  o Individual versus team decision processes  
  o Decision making with distributed project teams  
  o Types of decision making (demand, participative, consensus, etc.)  
  o Sense-making  
  • Problem solving techniques; innovative approaches (e.g., DeBono’s thinking hats)  
  • Communicating decisions  
  o Sense giving | • Exam  
  • Class exercises in thinking hats, and so on; timed exercises with situational constraints  
  • Case study involving ethics and negotiations  
  • Scenario: Evaluate behavior of stakeholders as per established choices and the consequences of those choices (legal, cultural, etc.) and discussion  
  • NASA case studies |
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<tr>
<td>11B</td>
<td>Basic Leadership Principles</td>
<td>• Leadership traits; empathy</td>
<td>• Exam</td>
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<td>• Leader versus manager versus entrepreneur versus change agent</td>
<td>• Class exercises, role plays, simulations</td>
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<td>• Leadership by all members, not just the PM; mentoring</td>
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<td>• Leadership styles, situational and shared leadership, servant leadership</td>
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<td>• Managing up—vertical leadership</td>
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<td>• Delegation</td>
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<td>• Self-managed teams</td>
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<td>• Leadership by influence</td>
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| 12   | Leadership—Part 2 | • Key processes/activities  
  o Developing citizenship behaviors  
  o Developing team culture  
  o Developing trust—shared models within the team  
  o Locus of control—delegation/vertical, self-managed/horizontal  
  o Rewarding performance and recognition  
  o Performance feedback and coaching  
  o Enabling and empowering teams  
  • Leadership Issues  
  o Cross-cultural aspects of leadership  
  o Leading in agile projects  
  o Generational leadership  
  o Negative leadership styles  
  • Self-assessment of leadership (see Individual as Team Member) | • Video scenarios: Analyze leadership practices/behaviors based on defined guidelines  
  • Guest lecture/discussion with local practitioner  
  • Scenario: Conference call in real life: Issues regarding virtual leadership, group activities regarding cultural differences, intergenerational leadership—how it affects the project plan  
  • Paper: Interview a PM and analyze/assess leadership practices  
  • Analyze award-winning projects regarding leadership principles |
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| 13   | Leading Change | • Change process Management  
○ Force-field analysis  
○ Change models  
○ Transition process  
○ Resistance to change  
○ Communicating during change  
○ Post-implementation reviews  
• Change leadership—the role of the PM | • Exam  
• Case Study: Develop a plan for change management  
• Integrate assignments/activities with stakeholder and communications plans |
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| 14   | Ethics and Professionalism        | • Principles- and values-based ethics  
• Global ethics  
• Ethical justification of behavior  
• Ethical leadership: organizational ethics versus personal or professional ethics; examples  
• Legal issues  
  o Country-based laws (e.g., Foreign Corrupt Practices Act, United States)  
  o Legal versus ethical issues  
• Remaining aware of global social responsibility  
  o Identifying relevant issues and determining materiality  
    ▪ Sustainability and green issues  
    ▪ ISO 26000 Issues  
  o Incorporating organizational and corporate social responsibility into the project design  
  o Evaluating outcomes  
• Whistleblowing and accountability  
• Examples of existing codes of conduct | • Integrate assignments/activities with stakeholder and communications plans  
• Case study involving ethics and negotiations  
• Scenario: Evaluate behavior of stakeholders as per established choices and the consequences of those choices (legal, cultural, etc.) and discussion  
• Examine a sample ethical code and apply it to a specific scenario |
| 15   | Course Wrap-Up                   |                                                                                                                                            | • Scenario: Develop a post-implementation review to capture knowledge                                                                                                                                                                                                                                                                                               |

Assessments of Learning
There are numerous ways to measure student learning in such a course. We suggest the following general approaches:

For the discrete definitions, terms, basic concepts, and so forth, it is appropriate to provide examinations on the content. Such an instrument will act to generally confirm that these particular terms or concepts have been understood by the student, although an exam does not, of course, guarantee that the student can apply the concepts in a real-world scenario. We have indicated in the course schedule the areas when this might be appropriate. There are several such areas—it is not assumed that the instructor will provide an examination in all such areas, only that these are points where an examination might provide at least one level of learning assessment.

In the case of the majority of the topics in this “soft-skill” domain, we feel that the instructor should provide opportunities for students to engage in simulations, role plays, and scenario analysis. Such activities offer significant opportunities for discussions, and give the instructor methods for evaluating the student’s application of learned concepts in situations where they are encountering new challenges or issues.

Reflective assessments are also significant in such a domain. These can be in the form of standard or other instruments that inventory the approaches of the student and chart them along certain dimensions according to rubrics. Communication and interaction styles are commonly measured in this way. The reflective essay is also an excellent tool to allow students to describe how they analyze a situation, how they would react or interact to others in the scenario, how they might choose certain behavior options over others, or what evaluation they might make in determining what behaviors would be appropriate in a given context.

Case problems and scenarios can be a good way to “stage” a situation that demands some interactive behavior. Role plays are an extension to the case problem/scenario in that the students can enact the scenario and then reflect on or analyze how it turned out, how they felt, what others might have felt, or why certain behaviors took place.

The case-study approach is also effective for this domain—there are several that would serve as a real-world example of a project in which a leader’s team, communication, or leadership skills have determined certain aspects of the outcome.

Experiential learning is perhaps the most adventurous of the approaches for learning assessment. This type of activity engages the students in a contained, but real, situation in which they must then analyze, reflect, and manage their own behavioral skills. Such an approach requires the instructor to arrange the staging of the project work, perhaps in a not-for-profit organization in the community or other similar real project opportunity.

The teaching resources that are provided in this volume contain some examples of the above—more can be found at www.pmiteach.org.