**Acceleration Review**

**Associate: James Edwards**

**Reviewer: Jennifer Dauksha-English Morgan**

**Date: May 28th, 2019**

**Does the reviewer recommend that the Associate pass: Yes – Pending agreeing on content creation and quality assurance.**

**My review is broken into seven sections:**

1. *Meets the Prerequisites for Accepting Acceleration Requests – I use the Advisor Handbook and outline whether or not James’s meets the stated prerequisites.*
2. *Primary Criteria for Passing an Acceleration Review – Again, using the Advisor Handbook, I qualify whether or not James has met basic standards for acceleration.*
3. *Proposal for Content Creation and Quality Assurance – Having reviewed many acceleration proposals, I’m taking that experience of prior accepted portfolio’s and making a recommendation.*
4. *Review of James’s Portfolio – I verify whether or not James met all of his Pre-Cap requirements.*
5. *Pre-Cap Internal Review – I attached James’s Internal Review to verify he fulfilled OP criteria/standards.*
6. *Feedback on Capstone Thematic Proposal – I provide detailed feedback on his thematic submission.*
7. *Feedback on Capstone Acceleration Proposal – I provide detailed recommendations on each OP he proposes to include in his accelerated Capstone Phase.*

***Meets the Prerequisites for Accepting Acceleration Requests***

* Has the Associate submitted at least three OPs for the current Action Learning Cycle? **LCR and LIPD submitted. Proposal is to repurpose previous OPs.**
* Does their portfolio contain all of the needed elements, reports, reviews etc.? **Yes. James completed and passed IR for his Pre-Capstone phase and passed review for his LCR and LIPD for the Capstone phase.**
* Has there been a written request for acceleration detailing why the Associate wishes to accelerate and justifies the acceleration based on their level of work? **Yes. It is included inside the LIPD.**

***Primary Criteria for Passing an Acceleration Review***

* **Strategic nature of project and documentation** work – *Yes, James’s provides extensive evidence in his Pre-Capstone Learning Review, and in his Thematic Proposal of the strategic nature of his work.*
* **Quality of output packets** – *James’s OP quality has continued to improve over the course of his Pre-Capstone phase. I’ve been his Advisor for over a year and have seen considerable skill-flexing. His LIPD is not his best OP, as far as quality of presentation, however I suggested that he get it submitted to move forward with this proposed acceleration process and then go back and make changes before he submits his portfolio for final review later in 2019.*
* **Project and time management skills** – *Yes, James’s work discusses the theory and practice of project and time management. He provides abstract models along with first hand experiences of best practices.*
* **Engagement** – Yes, James is quite engaged in the Gaia U community and in the fields that he works within.
* **Maturity** – *James’s first LCR shows a lifetime of professional work, indicative of a seasoned career.*

***Proposal for Content Creation and Quality Assurance:***

* As James’s Advisor I do recommend that he accelerate. As former Director of Advisory Services and prior reviewer of accelerations, here is my suggestion:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Requirement** | **Proposal** | **Pre-Review** | **Pro-Review** | **Advising Session** | **Comment/Status** |
| OP 1a | Merged Pre-Cap OPs 1/5 | NA | 1-hr | 1-hr | Completed/Passed |
| OP 1b | New + proposals | NA | 2.75-hrs | 1-hr | Completed/Passed |
| OP 2 | Combo of Pre-Cap OP 2/3 + new material | 1-hr | 3-hrs | 1-hr | **Completed/Passed** |
| OP 3 | Resubmit Pre-Cap OP 4 + new material | 1-hr | 2-hrs | 1-hr | **Completed/Passed** |
| OP 4 | New OP | 1-hr | 3.75-hrs | 1-hr | **Completed/Passed** |
| OP 5 | New OP + Pre-Cap OP 5 | 1-hr | 3.75-hrs | 1-hr | **Completed/Passed** |
| Presentations | MoP + EoP |  | Standard Allocation | 2-hrs | **MOP NA/** **EOP Pending** |

***Review of James’s Portfolio***

As of March 14th, 2019 James’s Pre-Cap Cycle Wrap Up was complete/passed.

**Basic Advisory Services Pre-Cap Review:**

* Has the associate completed all of their program attendance and service utilization requirements? If not, were appropriate re-negotiations taken and met? **YES - Confirmed this with Ava.**
* Did the associate include a welcome message on Pre-capstone OPs and thematic? **YES - the message has been included and updated. Thematic presented and approved by MA.**
* Has the associate completed all OP requirements, and if not, were appropriate renegotiations taken and met? **YES - as the MA and OP Reviewer I’ve been tracking that requirements are met with each OP submission.**
* Is the quality of the associate's work at or above satisfactory? **YES - James has responded to my OP and portfolio feedback, enhancing areas that were unsatisfactory.**
* Did the associate show considerable competency and attention for Gaia U skillflex development and overall pathway design and management? **YES - James provided a succinct and proficient review within his OP 5. I’ve looked over his response and incorporation of feedback and had a glance at self/peer/pro reviews and see considerable competency and attention.**
* Did the MA upload all appropriate records into the database and the associate onto their Mahara portfolio? **YES - All files are uploaded. OP templates were complete. Requirements for PoDAPO were met.**
* Were there any red flags related to the associate's communication, pathway management, status or financial obligations that need to be considered? **NO - there are no red flags.**
* **Summary of OPs:**



***Pre-Cap Internal Review***

Associate: James Edwards

Internal Reviewer: Jennifer Dauksha-English Morgan

Date: May 22nd, 2019

Does the reviewer recommend that the Associate pass from Pre-Capstone into Capstone Phase: Yes

*James’s Learning Review OP 5 gave a thorough overview of his professional work and his ongoing progress in the pre-capstone program phase. The documented work was relevant to the field described by the pathway in Integrative Eco-Social Design, and:*

*- Regenerative Economics*

*- Leadership*

*- Education*

*The quality of documentation demonstrates work that is adequate for having moved the Associate into their capstone phase and now into acceleration review. The Associate was able to present his work in a professional manner that utilized mixed media, was well edited and easy to interact with/understand. James has been encouraged to continue exploring more diverse writing styles and add even more mixed media in future Ops. Including clearly labeled media is an ongoing issue. Please be sure to identify the origin of all images and graphics.* **Completed**

*James provided a balance between presenting data to describe the project work and process reflection that demonstrated adequate progress and learning over the course of the phase. OP 5 included indications on how well James did at managing his pathway and tracking of skill building. I’d like to see more pattern analysis, additional examples and supporting evidence, and further metrics and comparative assessment. All of these suggestions will add significantly to pathway and project management.* **Completed**

*It was clear that the Associate engaged in numerous design processes, and the Associate indicated the impact their work had on their community and in the field. James was able to evidence external references to back up his excellent thinking. I still want to see more emphasis going towards dissemination and qualitative/quantitative tracking of impact/outcomes.* **Completed**

*Finally, I want to see further evidence in future Ops of experimentation and the detailed articulation of interventions.* **Completed**

***Feedback on Capstone Thematic Proposal:***

*In general, I approve the scope and focus of your thematic proposal. During your creation and submission of OP 5 we will need to hone in on a title. Presently it contains 6 words and is a bit too large for your diploma. Let’s see if we can narrow it down to 5 or better yet, 4 words. Maybe Regenerative economics, leadership and education?*

*I like how you say that culture shapes awareness and will. That your focus is thus on shifting culture. Your three study areas are noted to leverage and transform culture:*

* + Regenerative Economics
  + Conscious Leadership
  + Transformative Education

Together they hold determinant power to guide the arrow of evolution and course of humanity. Your goal is for humanity to live in harmony with nature and people. You view these areas of practice as a pathway to meet your goal.

You say that your thematic is best vehicle for self-actualization and systems-actualization. Explain what these mean. Define actualization. Provide a bit more personal and world context.

Good on definitions – though I’d add further clarification on the word regenerative. Out of the three descriptive qualifiers, this is the one that is least defined.

I appreciate that you explain and define each field from your own perspective and that of some other leaders and practitioners. You move from examples of practice into your own theory of change. Nice work on completing this within the context of worldviews/paradigm’s to shift. You mention how identifying intervention points is a worthwhile endeavor for a designer – which have you identified? Restate your projects. Or at least give one integrative example.

In education column you list some schools of thought. I’d like to see that for all three areas. What institutions and organizations are leading the field? What are the training prerequisites and qualifications for professionals entering these fields? Are there certifying bodies, diplomas, degrees, professional associations?

I would suggest you shift the title Self Evaluation section to Thematic Verification, as the word ‘evaluation’ is quite similar/linked to another requirement (the self-evaluation within PoDAPO). I would like to see this section mirror the previous section so it’s easier to compare what is the field with your experience within the field. Perhaps when you update this proposal for OP 5 you can make them more integrated. Field for field. Also, spell out the qualifications and how you meet them or explain how you don’t agree/ see gaps.

Again as noted in your LIPD review, integrate the goals section to add to or build on the thematic. As is it feels fragmented. This will assist with your tracking. Can you link 5 P’s within the three fields? I think it would be useful to give examples of tracking methodologies. **Completed**

***Feedback on Capstone Acceleration Proposal:***

Reason for acceleration request – solid/sufficient/strategic project work over three-year period whist enrolled within MSc Program (evidenced in OP 5) + life experience prior to Gaia University (evidence in LCR). Stated to evidence considerable professional development, career actualization and alignment with identified fields of practice and design (see thematic proposal).

You mention a mastery of design. Yes, I agree you’ve put into practice many design tools, and have improved your ability to articulate design processes, principles and patterns, however I still want to see more theory and assessment. **Completed**

**Capstone LCR** – Submitted/Reviewed April, 2019 – Passed Pro Review – No Pending Requirements. Focus on providing evidence of Pre-Gaia University (social and environmental justice) and Pre-Capstone Phase (IESD and world change). **Completed**

**Capstone LIPD** – Submitted/Reviewed April, 2019 – Passed Pro Review – No pending requirements, though included strong recommendations for improvement, specifically around integration of ideas and additional context. The OP includes thematic proposal, and acceleration proposal along with normal LIPD template. **Completed**

**OP 2** – Proposed (June) – Business as a Driver for Change – aim is to combine sections of Pre-Capstone OP2 and 3 (first-hand experience/practice) and add a section on theoretical and philosophical basis of Regenerative Economics plus a look at how to shift society in that direction.

Feedback: I would suggest you call the OP Regenerative Economics with a subtitle Business as a Driver for Change. That way it fits more with your thematic proposal and also won’t get confused with the Pre Capstone OP that holds the same title. **Completed**

**OP 3** – Proposed (June) – Theory U as a Method for Collective Change Making – based on Pre-Capstone OP 4 that includes lots of first-hand experience applying and leading others in the practice of Theory U. The new OP will include updates based on my Pro Review feedback and the inclusion of a new program James’s is creating at present.

Question: Which thematic area is most addressed in this proposed OP? Leadership or education, or both? If there is one that stands out, why not call the OP (and focus the content) by a name that matches your overall proposal?

Feedback: I would strongly suggest taking the word Theory U out of the title. For practical purposes, changing the name to Methods for Collective Change Making will separate this OP from your Pre-Capstone OP 4. It will likely make more sense on your transcript. Theory U almost feels too specialized at an MSc level. I also think adding a general context to the field of collective change making is paramount (using and comparing multiple examples), while then providing Theory U as a primary case study. You’ll have two samples of Theory U in Action and then conclude on a more general integrative level that links back to your three areas proposed in the thematic (or the one that stands out – given the answer to my above question). **Completed**

**OP 4** – Proposed (August) – Transformative Leadership and Education – this will be a new OP, not based on Pre-Capstone work. The concept is to revisit the Advisor and Mentor training and turn this into an OP while adding a framework for developing conscious leadership coaching arm of professional practice.

Question: Can you create a publishable piece for this OP to fulfill that requirement? In Dissemination section of your LIPD you mention creating a website that has links to OP content repurposed for Medium, a platform that houses articles. Can you be more specific? Do you intend to write articles? I’m fine if you have multiple small articles rather than one large piece. The important bit is that you get them up to professional publishable standards, receive feedback from peers in the field and share them widely.

Feedback: As this will be your final Capstone project, this OP needs to be pretty strategic and robust. I want to make sure you take time to go into quite some detail on the field of transformative leadership and education, while using 1. Your learnings from the training, 2. Framing your coaching style, and 3. Integrating it all back to the big picture of fields of practice and overarching goal to provide harmony between nature and culture. Show your past life experience/career and education, present projects and future plans. **Completed**

**OP 5**: Proposed (September) to follow normal Learning Review Template.

Feedback: Based on some of the areas lacking in your portfolio, I would like to see you pay extra attention to including the following areas in your pathway reflections and final learning review:

1. *More pattern analysis, additional examples and supporting evidence, and further metrics and comparative assessment of personal (skill building/learnings) and professional (models/tools, and ways of thinking).*
2. *I still want to see more emphasis going towards dissemination and qualitative/quantitative tracking of impact/outcomes. Adding a publishable piece will add value.*
3. *I want to see further evidence in future OPs of experimentation and the detailed articulation of interventions and evaluations. This will help with my desire for you to master the art of design even further. I see you added a section on evaluation in the LIPD, yet didn’t really propose specific evaluation tools be utilized. I see this as an area that needs some attention. As for tracking, it’s fine that you propose you do this on an OP/project basis rather than predetermining your steps, however this is a pattern you have and are you choosing t because it works best for you, or because your avoiding what isn’t quite in your present flow. I think it’s partially the later, as your Advisor. I’d like to see you come up with at least two tracking systems that can be applied cumulatively. If nothing else pops for you then at least do cumulative tracking of feedback and PoDAPO skill flexing.*
4. *Finally, based on my review of your LIPD, I’d like to see OP 5 really pick up steam where the LIPD was weak. I want to see you practice the art of integration. Define what it means to you. Employ integration at all levels in designing and implementing the many layers of OP 5. Use this amplification to harness the name for and refine your thematic proposal. Prove/validate your pathway within this context.* **Completed**

**MoP** – What Would Nature Do (Perhaps in July?) **NA**

**EoP** – Learning Review (Perhaps in September?) **Pending**