

OSR 13



Organization Systems Renewal Program

Master of Arts in
Organizational Design
and Renewal

Field Advisor
Handbook
2005-2007



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Welcome to OSR

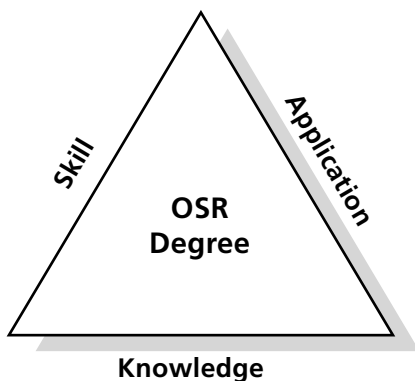
The OSR Program faculty and staff welcome you as a member of the OSR 13 community. The primary aim of the OSR Program is to provide each student with the opportunity to achieve excellence as a designer and leader of change, with particular emphasis on change within organizations and communities.

OSR emphasizes practical action based on solid theory. The program combines academic knowledge, skill development, and application. Integration of theory and practice will occur as you continually reflect on and apply your learning.

Knowledge. Through the knowledge component of OSR, students build a theoretical and conceptual foundation for organization systems renewal work. The knowledge component of the curriculum focuses on the growing body of organizational and systems theories and their potential application to organizational work. Major topics include: Living Systems, Design, Teaming and Collaboration, Organizational Inquiry, Intervention, Ethics, System Dynamics, Multicultural Perspectives, Leadership, Global Perspectives and Sustainability, and Personal/Professional Renewal.

Skill. The skill component of OSR challenges students to develop and demonstrate the skills needed to be effective leaders of change. Students build their academic and behavioral competence through participating in class sessions, completing program assignments, and contracting for feedback with classmates, advisors and degree committee members. Topics include: Exploration and planning of personal and work goals, communication, team development and group dynamics, consulting skills and praxis, and designing and leading participative meetings.

Application. In the application component of OSR, students demonstrate competence as practitioners in client settings. Students will participate in two Design Teams during the 22 months of the program. These student-lead teams design and deliver a learning day for the cohort (the *internal* client) on one of the OSR curriculum areas. In the sixth quarter of the program, students design and deliver a Consultation Project for an *external* client.



OSR Program Intention

It is the intention of the OSR Program to provide adult learners with opportunities to:

- Design processes and structures for leading and managing change
- Develop wholistic perspectives about individuals, groups, organizations and the world communities
- Recognize the synergistic qualities and opportunities inherent in living systems
- Develop the heart (courage, love, compassion), skills and integrity to move theory to practical action
- Develop congruence of body, heart, mind, spirit and professional practice to help individuals, groups, organizations and communities manage their own transformation and renewal

Core Values of the OSR Program

- We promote teaching and learning that is student-centered and engages the whole person.
- We create and nurture a learning community.
- We operate collaboratively and engage in co-learning with students, colleagues, and partners.
- We practice inquiry and critical thinking, and avoid an expert model of teaching or consulting.
- We model systemic thinking and a designer's perspective.
- We foster an innovative and entrepreneurial spirit.
- We are honest and open with students, colleagues, and partners.

Background

The Organization Systems Renewal (OSR) program, established in 1979, is the only one of its kind in the country. The program provides the opportunity for students to achieve excellence as designers and leaders of change within organizations and communities. The roots of the OSR program are rich and deep. The program was founded by Don Swartz with the help of pioneers in the field of whole systems approaches to organizational change, including Gordon Lippitt, Ronald Lippitt, Eva Schindler-Rainman, Oscar Mink, and Virginia Satir.

Program Design Highlights

The OSR Program reflects a non-traditional approach to education, including the following design elements:

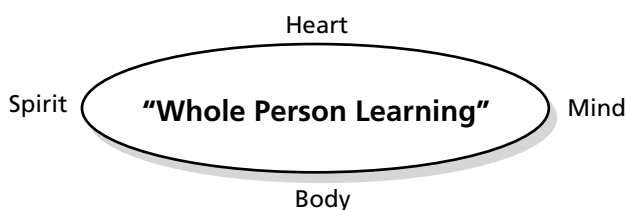
A Learning Community. OSR 13 is a community of co-learners composed of students, core faculty, guest faculty, staff and field advisors. OSR 13 is also part of a larger OSR community including alumni from previous cohorts. With each new class, the learning community grows.

Cohort Model. OSR is based on a “cohort” model of education. A student travels through the entire degree program with the same group of roughly 40 students. After seven consecutive quarters of full-time enrollment, they graduate together.

Learning by Doing. OSR emphasizes application of learning. Each student will develop and teach course content as a member of two Design Teams. Each student will also apply their learning in a Consultation Project and in ongoing personal and professional life.

Experienced Professional Peers. Most OSR students come into the program with significant prior work experience. Many OSR students will continue to work full-time while completing the program. This enriches the cohort’s learning by providing organizational contexts in which to apply OSR concepts.

Student-Centered, Whole Person Learning. The OSR program is learner-centered. This gives students the freedom — and responsibility — to tailor their degree program to achieve unique academic goals, address individual learning styles and meet program requirements. OSR also models a “whole person” approach to education by engaging not only one’s mind, but also one’s body, spirit and heart in the learning process.



Assumptions about Adult Learners

- *Adults are motivated by interests and needs that learning will satisfy*
- *Adults are oriented to learning that is relevant to life situations*
- *Experience is a rich source of learning for adults*
- *Adults need to be self-directing*
- *Adults want to be respected for their knowledge and life experience*

—Based on the work of
Malcom Knowles

OSR Structures that Support Learning

The OSR Program balances a learner-centered, self-directed philosophy with structures that frame each student's Degree Process and create environments that facilitate learning. These include:

- Academic Advising
- Collaborative Learning Groups (CLGs)
- The Learning Contract
- Design Teams
- Degree Committees

The following sections describe the function of academic advising and Collaborative Learning Groups (CLGs) in more detail. The Learning Contract, Design Teams, and Degree Committees are described in subsequent sections of the handbook.

Academic Advising

Faculty Advisor's Role

One member of the faculty serves as the student's advisor. The faculty advisor has the authority and responsibility to ensure that a student is making appropriate progress and meeting OSR program requirements. The faculty advisor also assists a student in developing and refining your personal Learning Goals and strategies. This is accomplished by:

- Helping clarify OSR program and Seattle University requirements
- Supporting the development of Learning Contracts and the formation of Degree Committees
- Coaching and mentoring to facilitate academic learning and professional/personal development
- Meeting with students in formal advising sessions (scheduled in advance)
- Approving Field Advisor members of Degree Committees
- Participating fully in Degree Committee meetings
- Reviewing required documentation for quality and completeness
- Determining whether learning meets graduate-level standards

- Ensuring that Seattle University standards and requirements are met and that established procedures are followed
- Signing all official documents

Collaborative Learning Groups

What are CLGs?

The OSR 13 cohort is divided into sections known as Collaborative Learning Groups. Time is set aside during each monthly session for CLG activities. While each CLG develops a unique “personality,” a shared purpose and expectations create a common foundation.

Purpose

CLGs provide participants with an ongoing small group to support one another in their learning for the duration of the program. This group creates an environment of mutual support that allows students to:

- Clarify Degree Process questions and expectations
- Increase understanding of OSR concepts through small group discussions and sharing of individual work
- Explore new insights, practice listening, and gain feedback in an environment where it is “safe” to take risks
- Gain a deeper understanding of group dynamics through direct experience

Expectations

Individuals within a CLG can contribute greatly to each other’s learning. For this to occur, each member is expected to:

- Contribute to a climate of openness, trust, honesty, confidentiality, civility, risk-taking and support
- Contract to give and receive feedback with other CLG members
- Participate fully in group processes: Communicating clearly, making decisions, resolving differences and fulfilling assigned group tasks
- Share responsibility for facilitation and make the best possible use of limited group time



Four ways learning evolves in the Degree Process:

- *Cohort's curriculum brings content **breadth***
- *Design Teams ensure content **depth***
- *Learning Contract provides **focus***
- *Consultation Project builds **skills***

The OSR Degree Process

The OSR Degree Process is structured to facilitate intentional, individualized learning through academic content, self-directed study, practical experience and engagement with a faculty advisor, peers and a Degree Committee you select.

Design Intentions of the Degree Process

The Degree Process is designed to lay a solid foundation for applied learning toward students personal and professional goals. Through the OSR Degree Process, students will demonstrate an **ability to think and act systemically and wholistically, while grounded in practical and responsible action**. They will also demonstrate an ability to design and create systems that serve human needs and desires, and facilitate appropriate change in existing systems. Specific intentions of the Degree Process ask students to:

- Create an environment that will challenge and foster their own creative process
- Become more aware and intentional about how they think and act
- Understand, refine and act on their own creative process, and use that creativity in designing a degree program
- Gain knowledge and experience as a systemic designer, facilitator and leader, and reflect learnings about these roles
- Develop the ability to reflect on and evaluate your design and its outcomes
- Engage in synthesis of the whole learning experience

Learning Contract

Each course in the OSR program curriculum will identify learning goals for that particular session. This assures a common foundation of theory and application skills is delivered in the program. Beyond this foundation, students have the opportunity to tailor their individual learning goals through the creation of a Learning Contract.

The Learning Contract is an agreement between a student and his or her Degree Committee that identifies a general Area of Focus, specific learning goals and supporting competencies they wish to develop during the program. It provides a structure for students to go beyond the basic curriculum in areas of their own choosing within the framework of the program. It also helps students focus their inquiry, project work, and reflective learning. The Learning Contract is developed during the first two quarters.

Why Does OSR Use a Learning Contract?

Learning contracts often are used in self-directed study and other independent learning situations. This process allows students to be active participants, rather than passive recipients, in the creation of their knowledge. The design of the OSR program is based on adult learning theory which stems from Malcom Knowles' theory of andragogy. Knowles emphasized that adults are self-directed and expect to take responsibility for decisions about their learning. The Learning Contract is the vehicle OSR uses to tap into this fundamental desire.

"80% of what you do is who you are".

– Don Swartz

"We grow in the direction of our learning contracts."

– Students in OSR XI

What to Include

While each student's Learning Contract may be designed a bit differently to reflect differences in personal and learning styles, each contract should include the following components:

- **Introduction:** Sets the context for the general topic a student wants to explore while in the OSR program. This can be very short.
- **Area of Focus:** Identifies the topic to explore during a student's time in OSR (e.g., leadership, multicultural conflict, visioning, trust, etc.)
- **Learning Goals:** Determine what a student intends to accomplish through your Learning Contract in the areas of:
 - **Theory Development:** What seminal works/theorists are connected to the Area of Focus? What is new in the field?
 - **Skill Development:** What personal skill development is related to the Area of Focus (e.g., managing conflict, listening, inquiry, facilitation, design, giving/receiving feedback, etc.)?
 - **Personal Development:** What "inner capacities" does a student wish to develop (e.g., creativity, self-awareness, spiritual, physical, emotional, etc.)?
 - **Note:** All three areas must be addressed in your Learning Contract.
- **Strategies:** What activities will be engaged in to support each Learning Goal? [Note: Many "activities" will already be a part of the OSR program. They can be tailored to connect with your particular learning goals.]
- **Demonstration:** How is it shown that goals are achieved? What is the evidence that a student accomplished what they set out to do? Good demonstration statements are based on outcomes, not activities.
- **Evaluation/Evaluators:** How will the work be evaluated? Who will review that work, approve completion of strategies, and verify demonstration of learning?

Design Teams

Every OSR student participates in two Design Teams, one each year.

Each Design Team learning event is an internal consultation project. The client for a team's work is the OSR community and the client contact is the team's faculty mentor.

- Client Group: OSR 13 participants
- Client Representative: Your faculty mentor
- Stakeholders: Future OSR Design Teams

Purposes

The task of a Design Team is to design a learning event that enables the rest of the cohort to gain foundational knowledge in one of the designated curriculum topics of the program. The learning event provides peers with a "theory and application" basis to inform their professional practice.

For team members, Design Team projects are intended to:

- Provide an opportunity to more deeply understand the theory and conceptual bases for a particular topic.
- Present real-time learning in group dynamics and collaborative team processes.
- Develop design and consultative skills



Although Learning Goals are firm, Design Teams enjoy wide flexibility as to the design approaches they take to their specific learning event.

Design Team (Collective) Deliverables

First-year Design Teams are responsible for designing and leading a one day session for the cohort. Most second-year Design Teams are responsible for two days in that they coordinate their one-day team presentation with a one-day visiting faculty presentation. The creation of a “coherent whole” adds an additional layer of complexity and integration to the Design Team process. Design Teams are responsible for delivering the following:

- An instructional component of the curriculum that supports the learning goals of the session
- A theoretical foundation that will inform their peers’ professional practice
- A presentation that models design principles and adult learning concepts
- A presentation that fulfills the agreement made with the client representative (faculty mentor)
- Any supporting documents for participants (e.g., session handouts)
- An annotated bibliography for the assigned reading list
- An extended bibliography of suggested additional readings for those who would like to learn more about the topic
- An evaluation component to gain feedback from the cohort (the client group) on the content, design and delivery of the session
- A Design Team notebook documenting key resources, event design and key learnings

Design Team (Individual) Deliverables

In addition to the team deliverables, each Design Team member is expected to:

- Write an analysis of his/her experience and key learnings (content and process) through the Design Team process. This is done for each Design Team experience.
- Write a comparative analysis of the first and second Design Team experience

These reflection papers are shared with both the Design Team faculty mentor and the student’s advisor.

Degree Committee

OSR students build a “support system” to help them navigate through the program. The Degree Committee is a major part of this support system.

Purpose of the Committee

The Degree Committee ensures professional-level competency and master’s-level achievement in your specific Area of Focus and overall program requirements. It will serve as your own design team or consulting group. The committee will challenge and support a student in achieving professional and academic goals. Committee members will also act as a sounding board for ideas, share information about resources to support learning goals, and engage in the creative process of the Degree Program.

In consultation with the Degree Committee, a student develops a Learning Contract, Theory Paper and a Consultation Project. The Degree Committee will evaluate learning goals, educational progress, and synthesis of the overall Degree Program. Finally, as a student nears completion of the program, they will recommend that student for Candidacy.

Membership

Your Degree Committee will include your Faculty Advisor, a peer from the OSR cohort, and two Field Advisors.

Field Advisors are often professional mentors who can provide personal support. Students may choose to meet with them individually outside of official meetings to discuss concerns or to seek suggestions. OSR alumni are also great resources because they can share their own experience in the OSR program. An ideal combination is often one Field Advisor who is an OSR graduate and one who is not.

Expectations of Degree Committee Members

Degree Committee members are expected to take an active role in supporting and evaluating your academic progress. Their most visible role is preparation for and participation in committee meetings. They should be willing to focus on the student, the OSR Program, and the Learning Contract while motivating a student to deliver the best that have to give. Potential advisors should be aware that OSR is an applied graduate program, thus not requiring traditional social science research and thesis. Degree Committee members should expect and commit to the following:

- Four formal meetings (2 hours long) over 22 months
- At least two hours preparation for each meeting (to read student work and formulate questions)
- Availability for informal discussion as appropriate to support a student's Degree Process

Degree Committee Meetings

Degree Committees will meet formally four times. The first meeting will take place Winter Quarter 2006 and will mark the Divergence Phase of the OSR Degree Process.

Degree Committee Schedule

Each meeting of your Degree Committee marks a key milestone in the OSR degree process. To remain on schedule, committee meetings should follow the schedule below:

Fall Quarter 2005	Select Committee
Winter Quarter 2006	1st Meeting: Divergence
Spring Quarter 2006	2nd Meeting: Convergence
Fall Quarter 2006	3rd Meeting: Progress
Spring Quarter 2007	4th Meeting: Candidacy

Meeting Preparation

All required materials to be presented at each meeting must be received by committee members and Advisor one week in advance.

Meeting #1: Divergence

Learning Intentions

The Divergence phase of the Degree Process challenges a student to expand beyond their current areas of experience or knowledge. The intention is for students to explore unfamiliar intellectual territory without pre-judging the utility or meaning of this new learning. Students will be guided in this process by their own personal interests and passions, in consultation with Faculty and Degree Committee Advisors.

Purpose of the Divergence Meeting

The Divergence Meeting is a time to familiarize Degree Committee members with the student, with other committee members and with the OSR Program. It is also a time to gain ideas that will support a student's exploration during the Divergence process. This meeting's main objectives are:

- To establish the Degree Committee and give members a chance to get to know each other
- To clarify expectations, roles and responsibilities and form a working group
- To answer questions about the OSR Degree Process and Program
- To review the Entry Statement and articulate the student's background, values and initial ideas concerning learning intentions and purposes
- To introduce the Learning Contract
- To obtain assistance in the process of divergence

Meeting #2: Convergence

Learning Intentions

During the Convergence Phase, a student will bring their interests into focus and explore ways to deepen their theory base and application skills. This is the time to think about a topic to research for the Theory Paper. This paper will form a foundation for the Consultation Project later in the program. In preparation for the project, a student will create a framing document that will help them explore the general type of application project that fits with the Learning Contract.

Purpose of the Convergence Meeting

The Convergence Meeting is a time to bring the Divergence Phase to a close while thinking about how the Area of Focus and Learning Contract will inform the Theory Paper and Consultation Project. Meeting objectives include:

- Progress review for both OSR program requirements and individual Learning Contract
- Review Theory Paper topic, outline, and resources and gather committee feedback
- Review Consultation Project Framing Document in order to get feedback on the general qualities of the project
- Formulate next steps and activities for learning

Meeting #3: Progress

Intention

During Summer 2006 a student will write their Theory Paper and do some general exploration for Consultation Project possibilities. In the Fall 2006 Quarter they will select a project and create a Consultation Project design. The Progress Meeting is a key time to review the design with the committee before beginning work on the project. The Progress Meeting also helps ensure that expectations of all committee members – including the student's – will be met at the final Candidacy Meeting. The Progress Meeting is held in late November/December of 2006.

Purpose of the Progress Meeting

- Progress review for both OSR program requirements and individual Learning Contract
- Discuss learning from Theory Paper and how it will inform the Consultation Project
- Discuss Consultation Project, with an emphasis on getting committee feedback on project design considerations
- Clarify Degree Committee expectations for the Consultation Project and Candidacy Meeting
- Obtain advisory input and approval before proceeding

Meeting #4 Candidacy

Learning Intentions

The Candidacy phase is a time for demonstrating competency in designing and delivering whole systems change within an organization. During this phase, students will demonstrate academic learning, design abilities and their own unique models, concepts or methodologies through the Consultation Project. At the end of this phase, the student will present the Consultation Project to the Degree Committee.

Purpose of the Candidacy Meeting

The ideal outcome of the Candidacy Meeting is for the Degree Committee to recommend your Faculty Advisor advance your status to that of a Candidate for a Master of Arts in Organizational Design and Renewal. This is done via a formal presentation of your Consultation Project, including the intended project outcomes, design, implementation, actual outcomes, client feedback, and assessment of learning. In addition the student will present their progress toward achieving the learning goals contained within the Learning Contract.

The Candidacy Meeting is also a time to demonstrate competency in designing and conducting a professional meeting presentation. As such, it is the most formal of the four Degree Committee meetings.

Next Steps

The Seattle University graduation ceremony is a time for all SU graduates to celebrate their achievements. OSR graduates will also attend a separate certification ceremony where they will receive a Diploma of Competency in Systems Renewal Consultation.



Completion Plan

It is not uncommon for there to be a few “loose ends” that must be completed before graduation. These will be outlined in a “Completion Plan” at the Candidacy Meeting.

Consultation Project

- The Consultation Project focuses on organizational change design work. For this project, students are engaged in design and leadership of a complex change process with limited consultant control over time and other variables.

Consultation Project Objectives

The Consultation Project provides opportunities to:

- Demonstrate learning achievements, skills and competencies in organization systems renewal, in line with Learning Contract goals.
- Apply, practice and hone what has been learned in OSR courses and on Design Teams.
- Contribute to employer and/or client organization(s) by working on real-life, real-time organizational systems change.
- Design for a client and demonstrate competency as a systemic designer.

Types of Documentation

Students do a great deal of writing as they document progress through the OSR Degree Process. A description of the types of documentation and the delivery timeline is described on the following pages.

The chart below outlines the major documentation required through out the OSR Program.

OSR Documentation Timeline Overview

Fall 2005	Winter 2006	Spring 2006	Summer 2006	Fall 2006	Winter 2007	Spring 2007
Entry Statement						Exit Statement
Monthly Course Papers	Monthly Course Papers	Monthly Course Papers		Monthly Course Papers	Monthly Course Papers	Monthly Course Papers
Quarterly Synthesis Paper	Quarterly Synthesis Paper	Quarterly Synthesis Paper		Quarterly Synthesis Paper	Quarterly Synthesis Paper	Quarterly Synthesis Paper
<p>Design Team Notebooks are due one month after a team presents. Individual reflections on Design Team experience are due the end of the quarter a team presents. Year 1/Year 2 comparison paper is due at the Graduation Degree Committee meeting.</p>						
Draft Learning Contract	Final Learning Contract					
Field Advisor Approval Form	Degree Committee Mtg. #1 Agenda Degree Committee Mtg. #1 Notes	Degree Committee Mtg. #2 Agenda Degree Committee Mtg. #2 Notes		Degree Committee Mtg. #3 Agenda Degree Committee Mtg. #3 Notes		Degree Committee Mtg. #4 Agenda Degree Committee Mtg. #4 Notes
		Theory Paper Proposal	Theory Paper			
		Consultation Project Framing Document		Consultation Project Design Document		Consultation Project Executive Summary and Outcomes Project Notebook
						Professional Resume Continuance Plan

OSR 13 Curriculum and Schedule

Fall 2005

September 13-18 ODVR 501: Foundations of Organizational Systems, Design and Renewal

(Residential) ODVR 502: Design - Development of the Adult Learner

ODVR 503: Learning Reflection and Synthesis

October 6-9 ODVR 504: Organizations - Group Dynamics

ODVR 505: Introduction to Research Literacy and Methods

November 10-13 ODVR 506: Systems - Introduction to Theory

Winter 2006

January 12-15 ODVR 507: Skills - Designing and Leading Participative Meetings

ODVR 548: Practicum - Curriculum Design and Delivery (Team 1)

February 10-12 ODVR 508: Design - Principles and Practice

March 10-12 ODVR 509: Organizations - Introduction to Theory

ODVR 510: Organizations - Collaboration and Team Strategies

Spring 2006

April 7-9 ODVR 511: Change - Theory and Ethical Interventions

May 12-14 ODVR 512: Organizations - Inquiry and Data Collection

June 8-11 ODVR 513: Organizations - Cultural Perspectives

Summer 2006

July, August ODVR 599: Independent Study – Research Paper and Consultation Project Design

Fall 2006

September 11-17 (Residential)	ODVR 514: Change - Transition and Renewal ODVR 515: Skills - Consulting, Data Analysis and Interpretation
October 13-15	ODVR 516: Organizations - Leadership
November 10-12	ODVR 517: Design - Preferred Future for Organizations

Winter 2007

January 10-14	ODVR 518: Skills - Consulting Praxis ODVR 548: Practicum - Curriculum Design and Delivery (Team 2) ODVR 549: Practicum - Consultation Project
February 9-11	ODVR 519: Systems - Living Systems Theory
March 9-11	ODVR 520: Change - Global Perspectives and Sustainability

Spring 2007

April 13-15	ODVR 521: Systems - Dynamics of Social Systems
May 11-13	ODVR 522: Change - Individual and Professional Renewal
June 8-10	ODVR 523: Design - Individual Renewal and Life-Long Learning
June 10	Seattle University Graduation

OSR 13 Student Progress Milestone Sheet

Quarter/Year	Month	Session Dates	Degree Process Activity/Documents
Fall 2005	September	13-18	
	October	6-9	Entry Statement Draft Learning Goals September Course Paper(s) October Course Paper(s) Interview Field Advisors
	November	10-13	Interview Field Advisors (continued) November Course Paper(s) Field Advisor Approval Form
	December	n/a	Field Advisors selected Quarterly Synthesis Paper
Winter 2006	January	12-15	Select Peer Advisor January Course Paper(s)
	February	10-12	February Course Paper(s) Finalize Learning Contract
	March	10-12	March Course Paper(s) DC Meeting #1: Divergence Quarterly Synthesis Paper
Spring 2006	April	7-9	April Course Paper(s) Theory Paper Topic Approval
	May	12-14	May Course Paper(s)
	June	8-11	June Course Paper(s) Theory Paper Outline Consultation Project Framing Document DC Meeting #2: Convergence Quarterly Synthesis Paper
Summer 2006	July	n/a	
	August	n/a	Theory Paper Explore Consultation Project possibilities

OSR 13 Student Progress Milestone Sheet

Quarter/Year	Month	Session Dates	Degree Process Activity/Documents
Fall 2006	September	11-17	Explore Consultation Project possibilities
	October	13-15	September Course Paper(s) October Course Paper(s) Select Consultation Project
	November	10-12	November Course Paper(s) Consultation Project Design Document DC Meeting #3: Progress
	December	n/a	Quarterly Synthesis Paper
Winter 2007	January	10-14	January Course Paper(s)
	February	9-11	Conduct Consultation Project February Course Paper(s)
	March	9-11	Conduct Consultation Project March Course Paper(s) Quarterly Synthesis Paper
Spring 2007	April	13-15	April Course Paper(s) Prepare Consultation Project Documentation DC Meeting #4: Candidacy <ul style="list-style-type: none"> • Consultation Project: Formal Presentation • Learning Contract: Review Demonstration of Learning
	May	11-13	May Course Paper(s) Exit Statement Continuance Plan Professional Resume Quarterly Synthesis Paper
Graduation	June	8-9	Consultation Project Binder
	June	10	