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Business Ethics Training and the COVID-19 Pandemic

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Business Ethics Training and the COVID-19 Pandemic

Spencer Yamada

Masters Design & Development Project Report
Instructional Psychology & Technology, Brigham Young University

Purpose

This project was originally to design and implement a learning experience that delivered small portions of micro-learning on a regular basis to learners in a corporate environment as a follow-up program to a traditional classroom ethics seminar. However, due to the COVID-19 pandemic the needs of the primary stakeholder shifted dramatically and we shifted towards an entirely new program. The new product was a digital seminar of 6 one hour sessions delivered over 6 weeks. The program was called Ethical Leadership Online or ELO and also included reinforcement materials that were distributed between sessions by email and a post-seminar reinforcement program. This report will detail how the shift was made and the lessons the team learned during the process.

Sponsor

The sponsor of the project was Merit Leadership Inc. of Provo Utah. Merit Leadership is a small but growing ethical leadership training and consultation firm primarily operating in the private sector but has clients in the NGO and government spheres including the US Military Special Forces. The founders of Merit have long felt that corporate education and especially ethics education is either devoid of useful ethical leadership skills by placing undue emphasis on the diversionary possibilities of taking employees away from their workplaces or overburdens learners with compliance do’s and don’ts. Merit Leadership is founded on the philosophy that ethics training can be engaging and transformative if ethics is taught as a practical skill. Merit Leadership also believes that ethics should be taught with practical technology applications and robust learning theories.
The design and development team was led by Aaron Miller, President of Merit Leadership. Also on the team was Barry Rellaford, a corporate training consultant and co-creator of the popular *Speed of Trust* book and training program.

**Learning Outcomes**

The learning goals were designed to help organizations develop a cohesive, ethical culture by coaching an attitude and developing intrapersonal skills within employees. Through the process of acquiring the key skills, the learners would develop new problem-solving approaches to ethical dilemmas and discover the power of a culture defined by the connections between individuals. The skills would also enable learners to intentionally use values as tools to solve problems and reach for the goal of an ethical culture. These skills were originally developed by Aaron Miller, co-author of the *Business Ethics Field Guide* (2016). These skills are broadly defined as leadership skills but are useful for individuals at all levels of any organization.

The five primary skills were:

- Mastering Values
- Resourcefulness
- Ethical Creativity
- Influence
- Intentional Culture

Each skill was the primary focus on a live seminar session with the addition of an introductory session totaling 6 sessions. Reinforcement emails between sessions invited learners to connect the previous session to the next session. The order of the sessions was important; each session built on the previous session’s content and activities.

See [Appendix: Content Analysis](#) for a detailed description of the learning objectives and outcomes.

**Economic Goals**

One of Merit Leadership’s primary goals with the project was to develop an innovative product for a marketplace dominated by traditional seminar formats. When pitching to clients, Merit wanted to be able to make the case that their products are more valuable because they are based in cutting edge learning theory, use technology to simplify delivery at lower costs, and are more effective at improving ethical behaviors than competitors. Thus a key metric of evaluation was the economic value the project would bring Merit Leadership.

To see the economic outcomes see [Appendix: Economic Outcomes](#) for the value generated thus far by ELO.
Project Needs and Constraints

Due to the wide variety of learners who may receive ELO, I did not do rigorous analysis on our potential learners. However I did know that our learners are generally interested in becoming more ethical and in participating in digital learning.

Learner Analysis

The learners were employees of organizations that have engaged the services of Merit Leadership. By and large, the learners are employees working in medium to large corporate organizations. Demographically and geographically they were diverse and represent many different industries and workplace roles. They earned more than an entry-level position salary +40k/year and all had a college education or held positions that would typically have a college education. Several had postgraduate degrees like MBAs and MPAs. The program was distributed to learners in a variety of industries and fields and is currently scheduled to be presented to learners in the military, law, marketing, and healthcare.

Apart from the growth of learning through social media and on mobile, general trends in the workforce informed the design. Surveys have shown that there is a growing disillusionment with traditional corporate careers resulting in the growth of freelancing facilitated by the use of digital connectivity. Some have argued that part of the explanation for the disillusionment with traditional corporate careers comes from perceived inadequate attention for ethical and moral behaviors in large organizations. Many Millennials have expressed a lack of purpose and meaning from their careers. While this information is more of a marketing analysis than learner analysis, I believed it supports the claim that there is an unmet demand for practical, engaging, and digital ethical training that can help organizations develop ethical environments for their employees. Much of our competition in the space of ethical training comes from the legal spheres of compliance, which is notorious for boring and long training sessions. I anticipated that the learners would be interested and feel an intrinsic interest in the content, assuming it was well prepared and presented.

Environmental Analysis

Due to COVID-19 lockdown measures, it was assumed that the learners would be in their homes or in isolated office spaces, meaning all interaction between learners needed to be done through the streaming platform. The learners needed a computer with a camera and microphone to participate in the seminar that I also assumed they would have access too. Our recruitment emails indicated that participants in the program would need access to these resources.

See Appendix: Environmental Analysis.
See Product Implementation: Recruitment Email.
Budget
The primary cost aside from my hourly wages was an email hosting service. Merit had already purchased HubSpot, a CRM and email manager, however the cost needed to upgrade the subscription to unlock certain features needed to run a microlearning program was much higher than switching to a different email client that had the features at a lower cost. After investigating alternatives and conducting a cost-benefit analysis, upon my suggestion MailChimp was subscribed to for $15/month.

The budget for the project was limited to $300/year to pay for any software products needed. I was also compensated at the rate of 18$ per hour.

Despite the radical shift in technology needs from the proposal to the final deliverable, the project was delivered on-budget for a total cost of $1,993.94 for my hours worked plus $15/mo for a MailChimp account.

See Appendix: Budget for a detailed budget and list of expenditures.

Timeline
The initial reinforcement project needed to be ready for a late May seminar delivery date. However, this seminar date was never scheduled due to the COVID-19 pandemic. The development team continued to refine and expand on the learning objectives and prepare content for marketing activities and future product development. The ELO began on Tuesday, June 16 and ended Thursday, July 23. The goal was to have the slide deck prepared two weeks prior to when it was due to be presented.

<table>
<thead>
<tr>
<th>Original Proposed Timeline</th>
<th>Revised Timeline</th>
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<tbody>
<tr>
<td>May 2020</td>
<td>Live ½ Day Seminar</td>
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<tr>
<td></td>
<td>June 16, 2020</td>
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<tr>
<td></td>
<td>First Live Online Session</td>
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<td></td>
<td>July 23, 2020</td>
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<td></td>
<td>Final Live Online Session</td>
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<tr>
<td>May-July 2020</td>
<td>Reinforcement Program</td>
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<td></td>
<td>July 28, 2020</td>
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<td>August 12, 2020</td>
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<td></td>
<td>First Reinforcement Email</td>
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<tr>
<td></td>
<td>October 2, 2020</td>
</tr>
<tr>
<td></td>
<td>Final Reinforcement Email</td>
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See Appendix: Timeline for a detailed timeline of the project’s events and production milestones.

Other Constraints

Merit Leadership had already developed a brand style that my designs needed to adhere to. While there was no formal style guide, I was provided with fonts, colors, and basic design elements that were originally developed for the Business Ethics Field Guide. See Appendix: Style Elements for a list of the design elements I was given to work with.

Product Description

Original Proposal

The proposal was for a learning experience that delivers small portions of micro-learning on a regular basis to employees as a follow-up program to a traditional classroom ethics seminar. The content would have provided short interactive digital content, deliberately calibrated to reinforce the training, add new principles, encourage the application of skills, and provide follow-up. In other words, the program would coach the learners to practice what they learned in the seminar in their workplace. The content would have drawn from a variety of available sources including history, podcasts, videos, blogs, quantitative and qualitative research, philosophy, and traditional business cases.

Revised Project Scope

Due to the COVID-19 pandemic and associated limits on in-person gatherings, the stakeholder decided to reevaluate almost every aspect of the project. Merit Leadership decided the original proposal for a microlearning email campaign was a project they needed to develop in the future, but the immediate need was to create an online seminar that would go for one hour per week and span 6 weeks. Though material had been coalescing for a live seminar format, the content needed to be significantly expanded and adapted for presentation as a live internet seminar.

Thus my efforts were redirected towards building the online seminar experience resulting in the following program.

- 6x 1 hour webinar slide decks with activities for learners. The webinar was presented each week for learners over 6 consecutive weeks.
  See Appendix: ELO Session Slide Decks.
• Reinforcement email program that reminded and reinforced learning between sessions and primed learners to prepare for the next session. The email also provided a way for learners to give feedback on the seminar they just received. See Appendix: Mid-Session Reinforcement Emails.

• Prototype workbook materials for the sessions. See Appendix: Workbook Prototypes.

• Post seminar microlearning reinforcement program. See Appendix: Post-Session Reinforcement Emails.
Reaching Learning Objectives

The learning outcomes were designed to string together sequentially. Each webinar covered one learning outcome, and the reinforcement email that came between sessions functioned as a bridge between each learning outcome. The post-seminar reinforcement email program reviewed each of the sessions and encouraged the learners to practice what they learned with the prototype workbook materials. Since the new seminar format was designed to be spread out over 6 weeks instead of one day, the need for a rigorous reinforcement program was deemed a redundant product. A post-seminar reinforcement email campaign was deployed at a significantly reduced complexity compared to the original proposal.

Maintaining Goals in Changing Times

In many ways, the timing of the pandemic allowed Merit Leadership to get a head start on training in the post-covid world by becoming a leader and innovator in the space of online leadership training that has many advantages compared to traditional in-person seminars.

- The weekly seminar format provided more opportunities to apply and reinforce content over an extended period of time.
- Clients could participate while adhering to social distancing guidelines.
- Companies with dispersed leadership teams could now easily become clients.
- Seminar materials could be licensed to other organizations for a fee.

Design Process and Evolution

The project moved through several distinct phases each with their own challenges. The project did shift in scope and purpose significantly as the needs of the client and limitations imposed by the COVID-19 pandemic reshaped many of the assumptions guiding key decisions.
Phase 1: Learning Objectives

One of the first tasks was to finalize the learning outcomes for the seminar and reinforcement program. Aaron Miller had developed 5 major learning outcomes that served as the foundation for the program. For example, we decided to remove Commitment as a learning goal and replace it with Resourcefulness because there needed a balance between individual and organizational learning objectives.

We also realized that the learning objectives could be arranged to form a cohesive structure in keeping with narrative learning that helps learners internalize each learning goal by connecting it to the previous one. We also decided to avoid making a traditional concept map, schema, or diagram to help us to focus on the learners’ needs. I discovered research that indicated that corporate training that incorporated graphical models tended to disassociate the content of the training from the context it was meant to be applied.

See Appendix: Content Analysis for the finalized learning outcomes.

Phase 2: Adjusting to COVID-19 April - June 2020

When the COVID-19 pandemic swept the United States in April of 2020, it caused a major shift in almost every aspect of the program. In early April, the team began meeting over zoom to comply with social distancing guidelines. We also decided to pause scheduling a live training session for the same reasons. While we waited for the virus situation to settle, I was tasked with creating marketing videos for future use. These videos would play an important role in developing a workflow for what would eventually become ELO; the team would collect a general outline or skeleton before I would make a polished draft for review the next week where it would be tweaked after feedback. The videos were supposed to be slideshows with a voiceover that presented content and invited watchers to participate in a small thought activity, a pattern that would be heavily used in the seminar. The videos also became valuable practice for me as the designer building presentations that adhere to the graphic style of Merit Leadership.

Creating the videos also provided an opportunity to expand and develop new content. The videos were made deliberately to contribute to the original learning objectives, meaning they were able to be repurposed for later use in ELO. This resource became especially useful when we needed to develop leadership skills in the later sessions.

See Appendix Marketing Video Slides to see all the video slide decks.

Figure 2
A slide from marketing videos that inspired later design elements
As we decided on a new course of action and began to develop ELO, I realized that all of the materials that I had been working on for the original plan still had tremendous value because they were designed to match the same learning objectives. With a small team, making sure we worked efficiently was a high priority which we were able to do because of the clear learning objectives and the theory behind the content of the learning objectives. If learning designers are embarking on a process that might shift in scope or product rapidly, perhaps spending significant effort in the early stages to solidify the learning objectives would ensure that all efforts would be of value even if there are dramatic adjustments to the project.

During this period I also began prototyping possible designs for the reinforcement emails for the original proposal. I made a variety of designs to experiment with length, type of activity, and tone and sent them out to a small group of testers recruited from friends and family.

**Figure 3**
A microlearning proof of concept design
I also started writing the copy for a microlearning email program as an early attempt to build the architecture of the narrative with the learning goals.

See Appendix Early Microlearning Designs for all these early prototypes.

We decided to pivot entirely away from a live seminar to creating a series of shorter seminars to be delivered over Zoom to comply with COVID-19 restrictions. The obvious need was to modularize or break up the original seminar material and present it to the learners in pieces because we knew we could not keep the attention of learners for four or more hours over zoom. Learners are isolated over zoom and have a greater incentive
to multitask or disengage during presentations because there is no social pressure to focus and participate. It is also tiring for the facilitator who needs to function at a greater emotional distance from the learners and thus would benefit from shorter sessions.

We quickly realized that this new direction presented several interesting opportunities. A modularized final product could also be tailored to fit within the scheduling conflicts of potential clients. For example, one company could integrate our seminar into their weekly staff meeting that is already scheduled while another could meet for two hours once a month.

Not only was I able to reuse the content I had begun developing for the live seminar, I was able to keep using our original learning theories. Microlearning under the strictest definition is limited to small digestible amounts of content spread over a longer period of time. While the development product would not technically be a microlearning delivery, I still used microlearning principles to break up the live seminar into more digestible segments and deliver them to learners over a longer period of time. I also decided to include reinforcement emails during and after the seminar that relied on microlearning principles.

One theory that was able to remain relatively unchanged was Narrative learning that was heavily used during the refinement of the learning objectives.

I was also able to use Jobs to be Done. Jobs to be Done is a development theory that uses relationships learners have with features of the product and the role those features have to produce designs to help the learners and stakeholders reach their goals. Since the “Jobs” remained the same, I felt this theory of development gave us the flexibility to rethink our assumptions about what I would be making and focus on helping the learners reach the objectives instead of clinging to our plans that were no longer relevant.
Phase 3: Creating Ethical Leadership Online

The process for presenting a seminar started three weeks prior to the scheduled delivery. In our team meeting I would discuss the scheduled learning objective and build a rough skeleton of the content that I would use as raw materials to create a session. I drew on material from the Business Ethics Field Guide, materials that I had compiled earlier for the original program, and my own content, mostly interesting case studies from my studies in history. I was also responsible for creating the pedagogy that consisted of weaving the content together to help the learners understand concepts, reflect, and practice the skills that defined the learning objectives. A week later and two weeks prior to the delivery I created a polished draft of the slide deck for Aaron and Barry to review. Both Aaron and Barry are experienced facilitators and subject experts and when combined with my design and development skills led to a balanced and efficient team. I often felt my ability to see the material for the first time afforded conceptual insights that tightened up the material and made it more applicable. My design experience also afforded opportunities to develop visual representations and metaphors that provided new ideas for content.

**Figure 4**

*Introduction slide for the first session of ELO*
Figure 5
Group activity from session 4 and reinforcement email sent between sessions 4 and 5

The reinforcement emails were built in a similar manner. I began by using our learning and development theories and learning objectives to brainstorm an outline that I would then build into a polished product that would be returned to the team for feedback.

One challenge with the build-build as we go method was maintaining a consistent visual look as I moved from week to week. To mitigate a design drift and ensure quality, I
created a template presentation after I built the first two sessions that had all necessary colors, fonts, and design elements. Creating a template was a time investment, however, when I was rapidly creating and deploying content, having the option to plug-and-play was an invaluable resource. Designers should consider making templates whenever rapid development is needed even if the initial resource investment might seem high.

See Appendix: Presentation Template.

The most pressing constraint on our development was time. I had less than three weeks from the beginning of the development cycle before the content was delivered to the learners. To counteract this I drew heavily on the materials I already created for the marketing videos. Many slides were able to be copied over with little to no adjustment.

As we developed the last two sessions, we realized that our methods needed to be updated to accommodate faster development. We also needed to improve our version control of the presentations and remove the files from our private computers. To reach this goal we decided to migrate all of our files to a box cloud account that allowed us to work simultaneously on the same file. This process put us significantly behind schedule on developing the last two sessions, however we knew this investment would pay off in the long run and that putting it off would only make the transition harder.

One problem I noticed was that participants often struggled to remember the activity or discussion prompt and spent a significant amount of time and effort trying to remember their assignment. This limitation presented an opportunity to build the company’s bottom line in future iterations because it demonstrated the need to create printed materials that would be mailed to participants and that would be sold at a significant margin. These workbooks would have the discussion prompt from the slides so the learners can stay on topic during a breakout session as well as traditional workbook features like note taking. I was tasked to build beta workbook pages for each of the sessions; the pages were labeled “tools” that the learners could “master” through practice on their own time. In keeping with our ethics as a skill model, the pages were designed so that the learners can use them during ethical dilemmas to guide their thinking. It was decided that the tools could not be sent to the participants during the seminar but rather as the content for a microlearning reinforcement program.

See Appendix: Workbook Prototypes.

Figure 6
Workbook prototype sent in reinforcement email
Another problem I noticed was that the design of the slides often clashed with the zoom UI. For example, some learners had trouble accessing all the information in the slides because in zoom, the window with the presenter’s face covered part of the presentation. I had the idea to design slides that would fit seamlessly into the zoom UI. I could have done some experimenting to try to make slides that, for example, had empty space where Zoom put the video feed of the speaker but I was reaching the end of the seminar and I decided to turn my focus to the workbook prototypes. If I had tested the slides in the live teaching environment, perhaps I would have caught this opportunity to innovate in time to apply it to our program.

One problem I noticed but were able to rectify with adjustments was the need to get learners involved in activities quickly. I noticed that seminars that did not begin with a group activity or breakout room resulted in less engagement and interest from the learners. I implemented a tactic to always begin sessions with some sort of activity where the learners can get talking so they will be more apt to engage through the session.

After each session, members of the development team and other employees of Merit Leadership who participated in the seminar would debrief and discuss. These sessions started organically but by week 3 became a regular meeting. I would incorporate the feedback after the Tuesday group to improve Thursday’s slides. Since I was a participant and not a facilitator in the seminars, I could pay close attention to the learners and make
observations regarding their attitudes and experiences with the learning. If these review sessions were structured with times dedicated to evaluating the positives and negatives of different aspects of the seminar, I could have made more deliberate improvements for this and future seminars. An important take-away from this process was that formative evaluation needs to have a structured implementation that includes a process for collecting and implementing feedback. At times, I lost sight of our goal of developing and prototyping a high quality learning experience and just tried to get through the process of development. It seemed that there was a natural instinct to neglect evaluation which I don’t believe is unique to our experience.

**Product Implementation**

Due to the shifting needs of the client brought about by the pandemic, my energies were re-routed from creating a microlearning reinforcement tool towards building the online webinar session slide decks and content. We called this new program Ethical Leadership Online or ELO.

By the second week of May, it was tentatively planned to begin a weekly seminar in the second week of June. Aaron Miller began to recruit participants and we all began scaffolding out the seminars. We decided that there would be 5 sessions to cover the 5 ethical skills and one additional session that would introduce ethics as a skill generally. We established a rolling production and implementation schedule where I would build the training deck including all the multimedia and activities for the learners two weeks before it was scheduled to be presented.

See [Appendix: Revised Project Timeline](#).

Aaron Miller was responsible for finding participants for ELO. He sent several recruitment emails to a group of local entrepreneurs and business owners. We were anticipating having enough participants for one session or about 20 people. However, 34 people signed up. Upon closer inspection we noticed that 17 of the participants were from one hospitality company. We decided to split our session and give this company their own session. We also decided to have Barry Rellaford be the facilitator for that session, which we scheduled for Thursday at 3PM MST. We put the rest of the participants into another session at 3pm MST on Tuesdays. This arrangement would allow us to test the content with different types of learner groups and with different facilitators.

**Figure 7**

*Email used to recruit participants*

<table>
<thead>
<tr>
<th>Ethics is a Skill!</th>
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<tbody>
<tr>
<td>(Especially a leadership skill.)</td>
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</table>

To adapt to the Covid-19 work conditions, we are piloting an online version of our Ethical Leadership workshop. This is a program designed
Due to civil unrest and protests over race inequality, it was determined to push the launch back one week to the third week of June. Participants were sent several welcoming and reminder emails that included the zoom link as well as calendar invites.

Between each session the learners were sent a reinforcement email two days before their session. The email included a link to a survey where the learners could review the previous session for our benefit. However, this data was only collected several times and was not included in the final evaluation report. These emails also briefly reviewed some content from the previous session and invited the learners to participate in a simple activity prior to the next session.

See Appendix Mid-session Reinforcement Emails:
At the end of the sessions, all the learners were sent a survey that asked them to evaluate various aspects of the course. The survey was sent in a mailchimp email that also introduced the post-session reinforcement emails they would be receiving.

I created 8 prototype workbook pages that would be used in future iterations of ELO. However, I did not sense their need until near the end of the seminar, so I sent them to each learner as a microlearning reinforcement email after the program ended. The emails had some short copy re-introducing the workbook sheet to the learner and a link to download a PDF file. The emails were sent once a week on varying days and times as an experiment to see which pattern was the most effective.

See Appendix: Workbook Prototypes.
See Appendix: Post-Session Reinforcement Emails.
Figure 8
Example of a post-session reinforcement email

![Email Example]

**Assessment and Evaluation**

The assessment and evaluation activities for ELO were conducted to determine how well the finished program realized the goals of Merit Leadership. The goal of the evaluation was to answer the following questions:

- Was the content interesting, relevant, and engaging?
- Did the webinar format provide an effective learning environment?
- Did the participants feel the seminar had economic value?

Another important question ELO raised regarded the cadence and pacing of the online seminars. I felt the once per week for one hour schedule would be difficult for clients to
schedule and was taxing to participate in, but I wanted to make sure this assumption was correct and see what alternatives our learners would suggest.

Criteria

I suggested a survey to collect quantitative and qualitative data to evaluate ELO as well as interviewing participants.

Procedures

The evaluations I conducted could be seen as formative towards the next iteration of ELO. With the development team, I wrote a 11 question survey and a 3 question interview protocol.

Survey Questions

1. Which sessions were you able to attend? (checkboxes)
2. How would you rank each of the sessions by overall quality and impact on your leadership skills? (drag and drop)
3. Which of the following tools from the program have you been able to apply to your work and career? (3 pt scale; poorly, well, confidently)
4. In a few sentences, please describe the insights you gained from Ethical Leadership Online and how it affected your leadership skills. (Short response)
5. Did you feel you had enough time between sessions to implement what you learned? (multiple choice)
6. How would you rate your ability to explain the following concepts/tools to a friend? (3 pt scale; poorly, well, confidently)
7. What was it like to participate in the program online? What aspects of the online instruction worked well for you and what are your suggestions for improving the online training experience? (short response)
8. Please explain your answer. What about Ethical Leadership Online was superior or inferior to other training programs? (short response)
9. Which of the following schedule scenarios would be best for your schedule and learning? (multiple choice)
10. Compared to other training you have participated in, how would you rate our Ethical Leadership Online program?
11. You were able to participate in a free version of Ethical Leadership Online as a beta user, would you have paid (or have your organization pay) for the program? Why or why not?

Interview Questions

1. Was the seminar useful in solving workplace problems? Why or why not? Which problems?
2. Who would you recommend this training to and why?
3. What were the most impactful activities or moments? What stuck with you?
Expert Evaluation

Merit Leadership has access to many experts in the field of corporate training and were able to participate in the training. Their feedback was also collected informally to gauge how to move forward.

A longtime developer and manager of corporate training programs had this to say after attending several sessions:

_The ELO training is a dynamic and well thought out delivery on the importance of having the right skills to navigate through an ethical dilemma. It was engaging and refreshing to see how easily it was for participants in breakout rooms and in group settings to share, so readily, their personal experiences and dilemmas, along with their values and insights. This is a result of the craftsmanship behind the learning design. Equally helpful were the tools and resources, along with the email reminders of what was learned. I really loved this training._

Barry Rellaaford, also an expert in corporate leadership development and a team member commented:

_The Ethical Leadership Online course is an excellent experience for all levels in an organization. It is well-designed with a combination of experiences, media, and resources that truly contribute to participants’ ethical skill development._

Survey Data

18 responses
100% completion rate

Inferences from survey data:

- As time progressed, attendance decreased.
- The most impactful sessions were Ethics is a Skill, and Resourcefulness followed by Creativity.
- There is no evidence to suggest that an hourly meeting once a week is not an effective cadence or model going forward.
- No negative feedback on the online experience generally.
- Individuals either strongly enjoyed or disliked breakout rooms. Making them smooth would be an important step moving forward.
- Many learners appreciated the convenience of online training.
- Most respondents did not feel like they couldn’t compare ELO to any other program because it was their first leadership seminar.
- Respondents felt ELO had economic value and would have paid for it.

Inferences from interviews:

- The facilitator played a large role in how the courses were experienced by the participant.
The material was valuable not because it was solving immediate business problems but because it was preparing individuals for future challenges. The age, career progression, and experience of the participants should be a key factor in how future learner groups are organized.

Based on the data collected, here is how I answered the key questions of the evaluation.

**Was the content interesting, relevant, and engaging?**
Yes. The attitude towards the content and its relevance was overwhelmingly positive. The Tuesday group had a stronger positive reaction to the content than the Thursday group.

**Did the webinar format provide an effective learning environment?**
Yes. The participants felt they were experiencing effective learning through the online, modular format. There is some evidence to suggest once a week is an effective cadence.

**Did the participants feel the seminar had economic value?**
Yes. The participants felt they would have paid to participate in the seminar, or have their organizations purchase seats for them in the seminar.

For a detailed report of the data collected and the participant responses see Appendix ELO Evaluation Report:

**Economic Outcomes**

One of the primary goals behind my project and the development of ELO is to generate revenue for Merit Leadership. By the end of the program, the leadership of Merit determined that it was of sufficient quality to begin selling immediately. The following are instances of the implementation of ELO and the associated economic value since the evaluation phase.

**Table 1**
Value generated by ELO

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<th>Implementation</th>
<th>Value</th>
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<tr>
<td>Chegg Insurance</td>
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<td>Assertio Therapeutics</td>
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<tr>
<td>Elevate Marketing</td>
<td>ELO/30 Participants</td>
<td>$10,000</td>
</tr>
<tr>
<td>Utah League of Cities and</td>
<td>Keynote Address</td>
<td>NA</td>
</tr>
</tbody>
</table>
Based on the expert assessment of the program and the rapid commercialization of ELO, Merit Leadership the primary stakeholders for my project have expressed that my work has met or exceeded their expectations.

**Design Knowledge and Critique**

Despite a massive disruption due to the global pandemic, the goals for Merit Leadership and this project remained the same. Even though the entire business model had to be rethought, flexibility in methods allowed the organization to accomplish what it set out to do; create an engaging, effective, and inventive ethical leadership development program. I have experienced times, both as a learner and a developer, where the product seemed to be finished just because it was started and had become obsolete by the time it was implemented. We had the luxury of being our own bosses, so making sharp turns was relatively easy. Yet when the world changes, designers should always be willing to adjust, rethink, retool, and see every roadblock as an opportunity.

I had the opportunity to work with two individuals who are subject matter experts, experienced teachers, and learning developers. I knew that my graphic design skills would fill an important hole in the team, but I saw that another important skill was my evaluation design experiences. From my coursework and projects in the IP&T department I saw how vital it is to design for evaluation and make deliberate decisions as to what evaluation questions needed answering, at what times, and in what ways. Thinking back to other experiences with developing and designing learning, everyone likes to be part of the design and development, but no one wants to even think about the often thankless work of evaluation. Thoughtful evaluation is not intuitive and needs to be deliberately inserted. I might suggest that learning developers become more aware of how their perspective on learning evaluation can be a unique voice in development. I also have come to think that evaluation should be an important touchstone early in development and function as a key ingredient as opposed to getting tacked on at the end of a project.

Unfortunately, I had to learn this lesson in retrospect. I wish I had realized how my knowledge of evaluation could have been brought to bear especially formative evaluation. Formative evaluation should have been a significant effort during this development process because I was creating a beta product. At times I treated formative evaluation as an afterthought and gave it an afterthought’s effort. I believe that with a
more thoughtful approach to gathering data from our learners while we were teaching and developing would have resulted in a better picture of the learner’s experience. In retrospect, the only information I had on the experiences of our learners as they went through the program was our observations of their body language or other cues through the zoom UX, which amounted to guesswork. It would have been immensely valuable to hear the voice of the learners as I built each session. I believed the program was going well, but I did so based on expert opinion and didn’t really know why or how from the learners’ perspective until after the program had ended. The primary stakeholder and my team didn’t value rigorous formative evaluation like I did, but they probably didn’t even know it existed in the form I have used so I should have brought that unique skill set to bear on the project sooner and more deliberately.

Another facet of the project that I would have liked to have given more attention too was questions of accessibility. The move to online and remote workplaces will open new opportunities and challenges to individuals who have a visual impairment for example. Future iterations of ELO should adhere to the highest standards of accessibility especially since the training is on ethics and should be for everyone.

In many ways I feel extremely lucky to have been able to work with two subject matter experts who also had a deep respect for the design and development process. In the past I have struggled defending my design decisions to stakeholders or subject experts that I felt were common sense and obvious. For this project I never had to push to get a good idea implemented, nor were my methods ever questioned without a useful suggestion from my teammates. I was able to build an effective and ultimately profitable product efficiently and after a very rapid pivot.

**Appendix**

**Actual Product**

**Marketing Video Slides**

These slide decks were designed to be made into short movies for marketing purposes. While they were never finished, much of the material was recycled into ELO content.
Standing Up to Power
Alexander Flemming
Radio Metaphor
Newton and Galileo
Sacrificing Personal Values
The World Has Changed
Could vs. Should

2. Practice with Others

3. Reward Ethical Problem-solvers
ELO Session Slide Decks

These were the final slide decks created for Ethical Leadership Online. While I was the primary designer, other team members contributed to the content and gave feedback.
Session 1: Ethics is a Skill

Introduction:

Being an Ethical Leader

- Who you are and what you do
- Locations
- Cake or pie (and your favorite kind)

You've just arrived.

Imagine that the local paper has an article reflecting on your career. It highlights four things about you.

What do you hope it says?

A Story about Leadership

“Never had until that point 30 years, think I had never done that before. I didn’t feel confident.”

“I didn’t have any idea how to handle it. Just you know what do I do. I didn’t have any idea what to do. People going to court and stuff, it’s not like other people, people’s thought would be like, ‘oh, you didn’t mean to do that, right?’”

“Never had an ethical issue or after an accident or whatever, so having someone come to your company and you having to respond to someone else’s problem and your company’s name is out there. It’s never happened before.”

State College, PA
Session 2: Value Mastery

Mastering Values

Omar's Dilemma

Dilemma

Dilemma

What would you do if you were Omar?
Write it down.

Mastering Values

Understanding Your Values

List 5 values that matter to you again and again

Was that hard?
Why or why not?
A dilemma is values in conflict.

Discussion:

What are the conflicting values and which ones are most important?

Recap and Takeaways

- Working in pairs, present your values and evolving values.
- Examine other students' values and see if you can identify where they are conflict.
- Create a personal code to abide by.
- Identify Conflicting Values Chart
- Discuss, copy, share, explain, and draw in each consensus.

Conflicting Values Chart

1. List the values in conflict

<table>
<thead>
<tr>
<th>Values</th>
<th>Agreed</th>
<th>Disagreed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honesty</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Integrity</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Caring</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Kareening</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

2. Identify the most important values.
Session 3: Be Resourceful

Dilemma

Andrea's Dilemma

- Master Value
- Be Resourceful
- Get Creative
- wield Influence
- Build Culture

Warm-up exercise

- Think of a time you were stuck - when something wasn't going well, looking back, what could you have done differently?
- Share your experience with the group.
- How do you think the group would respond to your idea?
Getting Better Advice

- Ask better questions
- Avoid common mistakes

• "Is there a pattern in my behavior or role?"
• "What scenario should I be learning?"
• "What did I do right?"
• "What did I do wrong?"

Getting Better Advice

Good questions help you see things you wouldn’t otherwise see.

• "What was the feedback given in the group?"
• "How can I improve?"
• "What conclusions can I draw from the feedback?"
• "What did the group say about my performance?"
Group Discussion:
Is there something in your life where you need better advice?
Session 4: Ethical Creativity

Getting Creative

- Master Values
- Be Resourceful
- Get Creative
- Build Influence

Think of a dilemma you are currently facing or have faced...

Dilemma

Think of a time when you faced an ethical dilemma and describe two conflicting values.

Is it easy to think clearly under this pressure?

A dilemma is values in conflict.

N. dilemma | dilemma dilemme

- Need to address the conflict by making a decision.

It's common and normal to feel stuck.

“Try to say you have no choice is a failure of imagination.”

Creativity is about creating.

Plato:

For everything that exists, there is an ideal form of it.

tableness

Do you try to make the "one right" table?
For every ethical dilemma, there are multiple good decisions.

### Could vs. Should Thinking

<table>
<thead>
<tr>
<th>Could</th>
<th>Should</th>
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</thead>
<tbody>
<tr>
<td>Flexible</td>
<td>Rigid</td>
</tr>
<tr>
<td>Outcome driven</td>
<td>Process driven</td>
</tr>
<tr>
<td>Multiple solutions</td>
<td>Single solution</td>
</tr>
<tr>
<td>Encourages creativity</td>
<td>Limits creativity</td>
</tr>
</tbody>
</table>

### Ingredients for Creativity

- Idea
- Resources
- Experience
- Attitude

### Goals

- Simple
- Direct ways of success
- Task oriented
- Short-term view
- Self

Write down some goals you have in your dilemma.

### Constraints

- In this dilemma because we don’t know what we need to know
- In this dilemma because we do not have enough time
- In this dilemma because the values in conflict?

Write down the biggest constraints in your dilemma.
Session 5: Influence

“Galileo taught not for the sake of truth, but because he was willing to make any assumption, accept any consequence, in order to win one.”

– Joseph Agostin

All leadership is influence.
This is true for ethics, too.
How are you doing?

Leadership Insight
Research shows ethical role models:
1. Show care and understanding
2. Have high personal standards
3. Are fair to others
4. Speak up

Tool 2: Storytelling

Think Back to Lessons at Values Mastery
As a leader at your organization, be prepared to influence the values of others with stories.

Why is it sometimes hard to accept someone else’s advice?

We have to come to our own understanding

Help Others Practice Skills
- Help others identify the values at stake
- Help them think through their perspectives
- Help them think creatively
- Help them develop their own strategy to test

Breakout Room Discussion: Share how someone’s coaching has helped you in the past.

Ethics is a SKILL
Session 6: Intentional Culture

Build Culture
- Master Values
- Be Resourceful
- Get Creative
- Yield Influence
- Build Culture

A Cautionary Tale About Culture

How to grow?

Consequences
- 5.5 million filed accounts opened
- $589M in new loans
- 400% of interest and fees
- $13.4 billion in extra income

"Wells Fargo’s航天of its
continued discrimination,
from a产生了 bad of
institutions.
Wells Fargo which
promoted explicit
greed.

How does company culture get so out of hand?

Culture = Values + Relationships

Culture is what we do together
Values in action with other people
Monitoring

- Understanding and measuring behavior effectively and consistently requires:
- Clear expectations and metrics
- Regular feedback and adjustments
- Accountability and consequences

Enforcing

- Skillful enforcement is crucial for:
- Maintaining order and discipline
- Ensuring compliance with rules and regulations
- Building trust and synergy in the organization

Which of these does your organization do well and which needs improvement?
- Teaching
- Guiding
- Monitoring
- Enforcing

Protecting

- An ethical leadership style is essential for:
- Creating a safe and inclusive environment
- Encouraging open communication and accountability
- Protecting the organization and stakeholders

Recap

- Master Values
- Be Resourceful
- Get Creative
- Wield Influence
- Build Culture

What are you going to do differently?

Ethics is a SKILL

Thank you!
Mid-session Reinforcement Emails:

These emails were sent to the learners between each session of ELO. Each email has a brief callback to the previous session and an invitation to briefly reflect on a topic or prompt before the start of the next session.

---

Hi, <<First Name>>!

We’re excited to start our Ethical Leadership course with you next week. Ethics is a set of skills, and this course will help you develop these skills in yourself and others.

In preparation for the course, we’d like you to ponder this question:

**What do you want the legacy of your career to be?**

It’s a deep question! Take a few moments to write out your thoughts.

Until then, here are some of the details for next week:

1. We will start on Tuesday, June 15 at 9:00 MT. You can join in this link: [https://us02web.zoom.us/j/89490933027?pwd=obZ5c1lQd3pNcGhQb2dYbllGdy9lZz09](https://us02web.zoom.us/j/89490933027?pwd=obZ5c1lQd3pNcGhQb2dYbllGdy9lZz09)
2. Please use a device that allows you to join the Zoom call via video.
3. Be sure to reach out if you can answer any questions or provide any special accommodations.

See you next week!

-Aaron

---

Hi, <<First Name>>!

I had a great time discussing the skill of Ethical Influence with you last Tuesday. This next week will be our last time together and I can’t thank you enough for coming with us on this journey! We have another short assignment to help you prepare for class:

**Think of a time you had a positive or negative experience with leadership and organisational culture.**

Maybe you were or are currently able to work in an organisation that had an uplifting or positive culture. Many of us have worked in places where it was toxic and distrustful. Please prepare to tell your story and share what lessons you learned from your experience.

See you next week!

-Barry

PS - We are always craving feedback, so if you have a moment please answer two brief questions.

---
Hi [First Name]!

I had a great time discussing the skill of [Skill Name] with you last Thursday. In preparation for next time, we have another short assignment:

**Think of your favorite story of someone doing the right thing.**

Maybe there is a story about a mentor or friend that has inspired you. Even fictional characters and their experiences can stick with us. So give it some thought and see what you can come up with.

See you next week!

-Aaron

PS: We are always craving feedback, so if you have a moment please answer two brief questions.

---

Hi [First Name]!

One of the worst things you can do as you face a dilemma is to be proud and turn inward. One of the best things to do is to ask for help from trusted confidants and experts. Since ethical dilemmas are very common, it helps to prepare a list of people we trust can quickly refer to for help.

Make sure to keep your [List Name] updated as you change jobs and progress in your career.

-Aaron

---

Hi [First Name]!

I enjoyed our hour together and having a chance to discuss the skill of [Skill Name]. I mentioned an article in the Harvard Business Review about the skill of receiving and giving advice, it is excellent and worth your time especially since we run out of time in class.

**The Art of Giving and Receiving Advice**

In preparation for next time, we have another short assignment:

**Think of a dilemma or hard decision you are currently facing.**

This could be an ethical dilemma or just a difficult decision. If you think about it, just about all of our big decisions are hard because of competing values and the people it will impact. Hopefully this exercise will help you with all of your hard decisions.

See you next week!

-Aaron

PS: We are always craving feedback, so if you have a moment please answer two brief questions.
Post-Session Reinforcement Emails:

After ELO ended, participants were sent 8 reinforcement emails that mimicked the order of the content they received during the seminar. The emails provided an option to download a worksheet designed to reinforce the content from the seminar.

Hi, <<First Name>>!

Have you ever been apart of a team where the leader was forcing a culture that just didn’t fit? Maybe you have seen the opposite where there was not enough control. Like a Park Ranger, you have to protect the natural and good, set a tone that keeps everyone safe, and chase after the unwanted habits and practices.

This is our last tool, hopefully these sheets have helped you apply what you learned in the seminar in your work and career. Remember, your newspaper article? Mastering the skills that will lead to your desired destination will take time but is well worth the effort.

Happy Travels!
-Aaron

Hi, <<First Name>>!

Beginning with the end in mind is one of the most time-tested principles known to leadership. However, sometimes goals get forgotten or their shine wears off. This is an activity to help you determine what kind of leader you want to be, your career goals, and how to remember them at important crossroads.

Use this tool as a waypoint to make sure you are on track as you navigate through your career. How people remember your ethical leadership will be one of your most important legacies.

-Aaron
Hi, <First Name>!

During the seminar on Value Mastery, you were asked to list your values over and think deeply about which values are the most important to you. In this worksheet, list your four most important values.

When you are facing a dilemma, use this worksheet to help you get your bearings so you can make a thoughtful decision.

-Aaron

Hi, <First Name>!

An Ethical Dilemma is a circumstance where values come into conflict. We all will face dilemmas, and a good way to start solving them is to consider what values are in conflict. When we can see the values we might be able to make a choice based on how important each value is.

When you are stuck in a dilemma, you can draw a T-Chart anywhere to help you think; use this worksheet as practice and a template.

-Aaron

Hi, <First Name>!

One of the worst things you can do as you face a dilemma is to be proud and turn inward. One of the best things to do is to ask for help from trusted confidants and experts. Since ethical dilemmas are very common, it helps to prepare a list of people we trust we can quickly refer to for help.

Make sure to keep your CAM list updated as you change jobs and progress in your career.

-Aaron

Hi, <First Name>!

Dilemmas often require a new or creative solution but often our minds go blank just when we need new ideas. Paradoxically, one of the best ways to get our creative juices flowing is to identify the limits of our options. This frames the situation so we can know where we can be realistically inventive.

In summary, you can't think outside the box if you don't know how big the box is.

-Aaron
Hi, <<First Name>>!

The ability to tell compelling and potent stories is an extremely valuable tool for an ethical leader. The best storytellers practice telling stories to refine their presentation, and so should you. Use the four compass virtues from Ethical Tool Kit and make some notes about how this value became important to you.

Have you ever listened to a speech or had a conversation with a bad storyteller? Isn’t it a pain? Don’t be that person!

-Aaron

Hi, <<First Name>>!

You may remember one of the most common misconceptions is that ethical leadership is about our character. We trap and limit our thinking if we try to decide what we should do, not what we could do with our skills and resources. This is a simple worksheet but it will definitely help you think through tough spots.

Using the limitations worksheet with could and should is a very potent combination of tools.

-Aaron
Workbook Prototypes:

These worksheets were designed later in the design process primarily for future iterations of ELO. They were also included in the reinforcement emails.
Cultivating Culture

Culture is what we do together or in other words, our values in action with other people. The most effective leaders are like park rangers who preserve an environment that is beneficial and ethical to grow. They also weed out invasive values and behaviors that are dangerous to the good things growing. Culture is cultivated not controlled. List the values and behavior that threaten the ethical culture in your organization and those that contribute to it. Then set goals for yourself to either cultivate or weed it out.

<table>
<thead>
<tr>
<th>Invasive (harmful, shortcut and values)</th>
<th>Personal Goal</th>
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<table>
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<tr>
<th>Beneficial (healthy and desirable culture)</th>
<th>Personal Goal</th>
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“When the culture is strong, you can trust everyone to do the right thing.”

-Brian Chesky

meritleadership.com
C.A.M.

A cam is a rock climbing tool designed to protect you in areas where there is no established route. Similarly, we find a strong anchor from Counselors, Allies, and Mentors, who can give us guidance. Next to each kind of perspective, **list specific people you can turn to and set goals to improve or develop your relationship.** When you are stuck in a dilemma, turn to this sheet so you know who to reach out to for advice.

<table>
<thead>
<tr>
<th><strong>Counselors:</strong> has expertise in your field with an outside perspective.</th>
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<td>Name</td>
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<tr>
<th><strong>Allies:</strong> within your organization who will support you.</th>
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<td>Name</td>
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<tr>
<th><strong>Mentors:</strong> Has your long-term growth and development in mind.</th>
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<tbody>
<tr>
<td>Name</td>
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“Most people do not listen with the intent to understand; they listen with the intent to reply.”

~Steven R. Covey

[MERIT Leadership logo]

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Knowing Your Values

A compass tells you what direction you are facing in relation to four absolute bearings, north, south, east, and west. Like a compass, we use our values as bearings to give us directions so we can better navigate our choices. In this exercise, list your four most important values and how that value became so important to you. The better you know your values, the better you will be able to use them to solve ethical dilemmas.

“It’s not hard to make decisions when you know what your values are.”
–Ray Disney

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Could & Should

Often we feel powerful negative emotions when we face ethical dilemmas which makes it hard to use our ethical leadership skills. Many people ask what they should do which makes them feel trapped. Research has shown that we can escape feeling trapped if we use a could mindset which helps us to think creatively and productively. **Think of a difficult decision or dilemma you are facing or have faced recently and write it on the top line. Use a should then a could mindset to think of ways to find a solution.** Can you tell a difference?

**Dilemma**

---

**What Should I do?**

---

**What Could I do?**

---

“Some men see things as they are, and ask why. I dream of things that never were, and ask why not.”

- Robert F. Kennedy
Could & Should

Often we feel powerful negative emotions when we face ethical dilemmas which makes it hard to use our ethical leadership skills. Many people ask what they should do which makes them feel trapped. Research has shown that we can escape feeling trapped if we use a could mindset which helps us to think creatively and productively. Think of a difficult decision or dilemma you are facing or have faced recently and write it on the top line. Use a should then a could mindset to think of ways to find a solution. Can you tell a difference?

Dilemma

What Should I do?

__________________________
__________________________
__________________________

What Could I do?

__________________________
__________________________
__________________________

“Some men see things as they are, and ask why. I dream of things that never were, and ask why not.”

- Robert F. Kennedy

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Creativity & Constraints

**Resources**
What resources do you need?

**Time**
What is limiting your time?

**Disagreement**
Who disagrees with whom?

**Information**
What do you not know?

Our most creative thinking happens when we acknowledge the boundaries and constraints we need to work within. Like a painter with a canvas and a frame, we have to know where we can and where we can’t be innovative and original. Research has identified four constraints that frame our ethical dilemmas. When you face a dilemma, **use this sheet to identify those constraints.** With a clear picture of your limitations you will be better able to think creatively.

“The enemy of art is the absence of limitations.”
- Orson Welles

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Preparation Your Ethical Legacy

Pretend you have just retired and a local newspaper decides to write a story about your career. What do you hope is written about you? List three things about your career you hope the story includes and why those things are important. As you make career decisions, refer to this sheet to make sure you are navigating to the destination you really want.

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<th>1.</th>
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“Carve your name on hearts, not tombstones. A legacy is etched into the minds of others and the stories they share about you.”

—Shannon Alder
Storytelling & Influence

Human beings instinctively transmit and remember values through stories. Thus your ability to tell stories well is a vital skill as you try to share your values with others. For this exercise, pull out the compass worksheet where you identified your four cardinal values. Use this worksheet to identify a story you can tell to share each value with others. Give each story a memorable title then make a list of the key details that each story needs in case you need to tell it quickly.

<table>
<thead>
<tr>
<th>Value</th>
<th>Title</th>
<th>Key Details</th>
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<tbody>
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<td>N</td>
<td></td>
<td></td>
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<tr>
<td>S</td>
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</table>

“No story lives unless someone wants to listen. The stories we love best do live in us forever.”
~JK Rowling

meritleadership.com
Conflicting Values

Dilemmas happen when we have a decision that forces us to **choose between competing values**. By identifying the values in conflict, it can help us see a clearer picture of the dilemma and then choose which values are the most important. Start by **writing the dilemma** on the top of the T. Then on each side, **write a possible decision and the values needed to support that decision**. Like a scale, the weightier choice will become clearer.

---

"Ethics and equity and the principles of justice do not change with the calendar."
- DH Lawrence
Style Elements

While Merit Leadership lacked a formal style guide, the following design elements were provided to help me represent the Merit look and feel in my designs.

The Business Ethics Field Guide formed the backbone of the brand constraints. Beyond ensuring the product matched the Field Guide, I was given free reign to solve design problems as I saw fit.
This topographic map was a visual metaphor used in the book and the seminar slides to represent the need to navigate through ethical dilemmas and to develop leadership skills.

Environmental Analysis

Data collected during COVID-19 pandemic showed that 42% of the US workforce was working from home. That is functionally everyone that is a non-essential worker. This gave us the confidence to assume that our learners would be at least somewhat familiar with video-conferencing software like Zoom and that we would be reaching them in their own homes or a different isolated space.
Content Analysis

The learning goals are designed to help individuals, leaders, and organizations improve their ability to make ethical decisions during dilemmas. Through the process of acquiring the key skills, the learners will develop new problem-solving approaches and discover the power of a culture defined by the connections between individuals. The skills will also enable learners to intentionally use values as tools to solve problems and reach for the goal of an ethical culture. These skills were originally developed by Aaron Miller, co-author of the *Business Ethics Field Guide*. These skills are broadly defined as leadership skills but are useful for individuals at all levels of any organization. These learning objectives began as the following but evolved and changed as the design process progressed.

The initial core skills were:
- **Creativity:** When facing ethical decisions, individuals create possibilities for action; the greater the ability to think creatively about problems, the greater the ability to solve them with alternatives.
- **Intentional Culture:** Leaders make culture even if it is unintentional. Leaders need to take responsibility for the culture of their organizations and shape the culture deliberately.
- **Influence:** Individuals need the influence to make meaningful changes in organizational culture. Other people need to be part of solutions and a lone wolf needs to build consensus.
- **Values Mastery:** Everyone has values that shape what they think is right, what is wrong and how to go about making decisions and acting. Our values can be tools to help us solve problems but we need to know what our values are, evaluate them to make sure they are good values, then learn how to use them.
- **Commitment:** Learners need the skill to continuously remake their decisions. It is easy to decide on a course of action or set of values, it is hard to continuously recommit to that initial decision after time has passed.

As we continued to refine and prepare the content for ELO, we configured and refined the skills. This configuration would define the order of the skills and how the content would connect with other portions of the seminar.

<table>
<thead>
<tr>
<th>Session Topic</th>
<th>Learning Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ethics is a Skill:</strong></td>
<td>Define dilemma as values in conflict.</td>
</tr>
<tr>
<td></td>
<td>Explain why ethics is a skill.</td>
</tr>
</tbody>
</table>
We found we could order the skills from individual (focused on individual reflection) to organizational (focused on leadership and management). We felt that having the learners develop their own ethical skills would better prepare them to help others do the same from a leadership position. Since our approach to ethics is unique, we had the opportunity to be the subject matter experts.

**Annotated Bibliography**

**Domain Knowledge**

<table>
<thead>
<tr>
<th>Skill</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mastering Values:</strong></td>
<td>Individuals can use their personal values as problem-solving tools to resolve ethical dilemmas.</td>
</tr>
<tr>
<td></td>
<td>Identifying competing values in a dilemma.</td>
</tr>
<tr>
<td></td>
<td>Identify personal values.</td>
</tr>
<tr>
<td><strong>Resourcefulness:</strong></td>
<td>Individuals should gather resources in preparation to face ethical dilemmas.</td>
</tr>
<tr>
<td></td>
<td>Prepare a list of Counselors, Mentors, and Allies.</td>
</tr>
<tr>
<td></td>
<td>List the three main resources available during a dilemma.</td>
</tr>
<tr>
<td><strong>Ethical Creativity:</strong></td>
<td>Leaders in organizations need to help their employees practice and prepare to face ethical dilemmas.</td>
</tr>
<tr>
<td></td>
<td>Use a “Could vs Should” framework during dilemmas.</td>
</tr>
<tr>
<td></td>
<td>Create a list of constraints for decision making.</td>
</tr>
<tr>
<td><strong>Ethical Influence:</strong></td>
<td>Leaders can shape and influence the values of organizations by mastering certain skills.</td>
</tr>
<tr>
<td></td>
<td>Identify story-value pairs.</td>
</tr>
<tr>
<td></td>
<td>Explain the role of relationships in influence.</td>
</tr>
<tr>
<td></td>
<td>Demonstrate good coaching practices.</td>
</tr>
<tr>
<td><strong>Building an Ethical Culture:</strong></td>
<td>Leaders should gather resources and plans for their organizations in preparation for future ethical dilemmas.</td>
</tr>
<tr>
<td></td>
<td>Define &quot;culture&quot; as group values in action.</td>
</tr>
<tr>
<td></td>
<td>Define &quot;weeds&quot; and &quot;flowers&quot; in their organizations.</td>
</tr>
</tbody>
</table>

Through three sets of data on how individuals solve ethical dilemmas, the authors present a compelling case for Ethics as a skill and not an aptitude or characteristic. Their work contributed to the first session on “Ethics is a skill” and the session on Ethical Creativity. In Ethical Creativity, one activity mimicked one of the studies in this paper. Zooming out, this paper has played a large role in shaping the learning objectives as functional skills, not conceptual ideas.

Agle, B., Miller, A., & O’Rourke, B.. (2016). *The business ethics field guide*. The foundational source of content for ELO and a major product offering for ELO; one of the co-authors was on the development team. Many ELO sessions included quotes, exercises, or dilemmas from the field guide and participants received a free copy once they filled out the post-session survey. ELO was designed to complement the field guide by teaching foundational skills to manage and prevent ethical dilemmas while the field guide would serve as a reinforcement and “just in time” training resource for the participants.


The authors examine nuance in the relationship between ethical leaders and followers and what attributes and skills both groups need to successfully improve the workplace. We drew on these findings to teach the learners about using and finding mentors as well as how leaders can effectively implement a shift in organizational culture towards ethics.


This paper on issues with compliance in large corporations guided a lot of our development on leadership development. The Business Ethics Field Guide provided ample content to discuss personal ethical skills, however congruent leadership ethical skills was a major content gap. This paper provided content for our last two sessions on Intentional Culture and Influence that helped learners develop leadership skills and practices that went beyond making a lot of rules for their followers. Rather, the focus was on how to translate their personal ethics skills to leadership applications.

**Learning Theories and Instructional Strategies**

I applied Lave and Wenger’s work on situated learning and communities of practice extensively in our methods. Many learning activities focused on helping learners connect and form relationships with each other with common terminology. I also put in a lot of effort into helping the learners apply the skills they were learning in their jobs. The drawn-out design and reinforcement materials gave us opportunities to help the learners situate what they were learning into their workplace between sessions.


Margol compiled a useful reference that discussed microlearning applications and development strategies. One tenet of microlearning is that content should be relevant and solve important pain points. Much of our instruction focused on interpreting problems that the learners have or will face and giving them the tools to solve those problems in an ethical manner. Margol also suggested developing a microlearning library with content to draw from quickly, a method I copied early in the process by creating a spreadsheet of small self-contained content.


The authors of this McKinsey report argued that leadership development often fails to make long-term impacts on its learners because developers fail to take the time to understand the mindsets of learners, the context of the learners, and the relationship between the job an employee had and the training the individual was receiving. To counteract these issues I wrote our learning objectives to help the learners move from one specific mindset to a new one and to clearly define what ELO would do for their workplaces and what it would not do.


The authors argue that microlearning’s effectiveness is enhanced when the segments are personalized. To this end I took the extra step of building in the names of participants into the reinforcement emails during and after the seminar.

**Instructional Design Approaches**


The authors detail an approach to product development that focuses on understanding the relationships between the features of the product and the goals of the customer. This framework was very helpful as the team retooled
during the COVID lockdown to come up with a new set of features to meet the changing constraints and needs of the customer.


Parrish gave a list of design principles to enable narrative learning and providing learners with what I might call an inspiring experience. I consulted this paper frequently in the early stages of development, especially when it came to writing out learning objectives which allowed us to pivot sharply and efficiently. It was also influential in how I designed the content model to be self-referential and symmetrical.


Peschl argued that microlearning can enable deep learning if it is designed to help learners develop knowledge and situate it, similarly to Lave and Wenger. Taking Peschl’s suggestions to use microlearning as a means of posing questions to learners, I designed the mid-seminar reinforcement emails around questions the learners needed to think about, if not answer, to prepare for the next class.


While the authors of this article provide a useful list of do’s and don’ts this article strongly influenced the decision I made early in the build process to not build a conceptual model for the learners. The authors argue that models do not instruct or reinforce behaviors, our product needed to teach skills applicable in real situations and encourage the practice of those skills, not abstractions that can be represented graphically or metaphorically.

**Design Specifications**

**6, 1 hour webinar session slide decks (29-49 slides each).**

5 sessions covered each of the learning objectives with one session to introduce the course generally.

**6, Reinforcement emails with priming activities (two versions of each email, one for each section).**
Each email was sent to the learners prior to each session. The email included reinforcement content from the previous session and preparation materials for the next session.

8, pages of workbook prototype pages (containing activities and copy).
The pages were designed to be used during future implementations of ELO to aid in-seminar activities.

8, Post session reinforcement emails (containing copy and workbook pages).
The 8 emails contained the 8 workbook pages for the learners and were sent to them after the end of the seminar at a rate of 1x week.

The learners' experience was largely passive with the components of the design. Learners would log onto Zoom at their specified time (Tuesday or Thursday at 3:00 PM MST) and participate in a seminar. The students listened to lectures, watched videos and did individual and group activities. They also participated in breakout room discussion groups and discussions with the larger group. In between sessions learners received a short email with a small bit of content from the previous session and a short activity that would prepare them to participate in the upcoming seminar.

When the seminar was over, learners received 8 emails in consecutive weeks that reminded them of a piece of content from a portion of the seminar and a downloadable PDF with a worksheet they could use in the real world to manage ethical problems. The order of the content in these emails mimicked the order of the content in the seminar.

Each session covered one of the 5 ethical leadership skills defined as the primary learning objectives and an intro session. They were presented in order of the objectives to help the learners first develop skills relating to personal ethical challenges before learning how to use the same skills as leaders in their organizations. Seminar sessions defined the skills and provided examples of their effective use or cautionary stories that warned against their misuse. Learners were assigned simple activities to practice activating these skills in their current workplace environment.

The pre-session email reminded the participants of the content and skills from the previous session and encouraged them to keep practicing the skills they learned. They were also invited to conduct a simple mental exercise to prepare for the next session. This exercise was integrated early in the next session to speed the session up and give them an opportunity to share their thoughts with other participants. Sessions frequently referenced material from previous sessions to help learners see the cumulative nature of the skills they were building as defined by the learning objectives.

At the end of the 6 sessions the learners received an email once a week for 8 weeks that repeated key concepts from the seminar in the order they were originally presented. The emails also contained a downloadable PDF “tool” or worksheet that the learner could use in real life ethical predicaments to apply the skills learned in the seminar.
**Addressing the Research**

My research showed that there is ample evidence to support our approach to content, development, and implementation. Research suggested that when ethics is conceptualized as a skill, individuals are better able to solve dilemmas and to solve them in a more ethical manner. Importantly, when ethics is a skill, it is also a teachable skill as opposed to a character or moral trait that is much harder to reinforce with training. My research showed that effective leadership training is focused on practices, principles, and skills that are capable of solving the problems learners are facing and are not focused on conceptual schemas or models. Learners also need reinforcement, a tool microlearning is well suited to address. It also is clear that the training needs to be engaging and interesting to the learners otherwise the content will be negatively associated, leading to unchanged or possibly negative behavior outcomes. The training also needs to avoid becoming disruptive to the workplace and instead find ways to synchronize with the needs of the learners. Our weekly session schedule did not eat up a large portion of time so as not to disrupt the learner's workday, it also gave the learners an opportunity to apply what they were learning in the sessions to their jobs. The spread out structure also gave us, the designers, to build in opportunities to reinforce the learning. This was done inside the live sessions as well as in the reinforcement emails during and after the program.
Design Representations/Prototypes

Presentation Template

This is the template that included all the graphic elements needed to build a session slide deck.
Workbook Prototypes:

These are early drafts of the workbook pages created at the tail end of the seminar that will serve as a foundation for a workbook in future iterations of ELO.

Early Microlearning Designs:

- Galileo the Lonely Genius
- William James Quote
- Free Solo
- Ethical Hero
- Narrative Structure Copy

Prior to the retooling of the project away from a microlearning reinforcement program these emails were created to experiment with design, length, topic, and media. The document was created as an early attempt to form a narrative structure for microlearning segments.

Evaluation Instruments

At the end of the seminar, all participants were sent a 9 question survey designed to evaluate the 3 primary outcomes designated by Merit Leadership. One of the outcomes was assessing if the learners understood and felt comfortable practicing the fundamental skills. The other two was if the online model could work as effective learning and if the product had a perceived economic value.
The 9 question survey was created in Alchemer (formerly SurveyGizmo), a licensed survey software program that Merit Leadership had a subscription to. Survey Link

Evaluation Protocol Interview Protocol

Short 15 minute interviews with selected participants.
Two from each session.
Notes were typed into a spreadsheet during the interview.

Interview questions:
- Was the seminar useful in solving workplace problems? Why or why not? Which problems?
- Who would you recommend this training to and why?
- What were the most impactful activities or moments? What stuck with you?

ELO Evaluation Report

Purpose:
To evaluate the impact and effectiveness of the Ethical Leadership Online program. Propose adjustments for future iterations.

Results from end of seminar survey:

1. Which sessions were you able to attend?
As time progressed, as a general trend attendance decreased.

2. How would you rank each of the sessions by overall quality and impact on your leadership skills?

<table>
<thead>
<tr>
<th>Item</th>
<th>Overall Rank</th>
<th>Score</th>
<th>Total Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mastering Values</td>
<td>1</td>
<td>84</td>
<td>18</td>
</tr>
<tr>
<td>Be Resourceful</td>
<td>2</td>
<td>74</td>
<td>18</td>
</tr>
<tr>
<td>Ethics is a Skill</td>
<td>3</td>
<td>70</td>
<td>18</td>
</tr>
<tr>
<td>Ethical Influence</td>
<td>4</td>
<td>60</td>
<td>18</td>
</tr>
<tr>
<td>Get Creative</td>
<td>5</td>
<td>49</td>
<td>18</td>
</tr>
<tr>
<td>Building an Ethical Culture</td>
<td>6</td>
<td>41</td>
<td>18</td>
</tr>
</tbody>
</table>

This question did not account for participants who did not attend any given session. Impact decreased with time.

3. Which of the following tools from the program have you been able to apply to your work and career?

<table>
<thead>
<tr>
<th>Item</th>
<th>Poorly</th>
<th>Well</th>
<th>Confidently</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>Row %</td>
<td>Count</td>
<td>Row %</td>
</tr>
<tr>
<td>Ethics is a Leadership Skill</td>
<td>1</td>
<td>5.6%</td>
<td>7</td>
<td>38.9%</td>
</tr>
</tbody>
</table>
4. In a few sentences, please describe the insights you gained from Ethical Leadership Online and how it affected your leadership skills. (Selected quotes)

Response

There were several instances we were working with a specific issue that this series helped develop some thoughts around resolutions for.

Values assessment was interesting to me to see how my values line up with the corporate values.

My favorite piece was evaluating options and working to create more options before you make a decision.

There are two critical takeaways for me: Being reminded of the need and ability to apply this everyday and some of the tools and constructs you taught us to use in support of daily application.

It gave me a new perspective and helped me to recognize that everyone has weaknesses, even leaders. Strong communication and practicing making those ethical decisions can train our brain to make ethical decisions more automatically in the future.

I feel I learned to be more thoughtful about things, to avoid taking things at face value. I also feel I learned tools to better manage my team and pass on to my employees.

The most important piece of the program for me was to involve our team in the discussion of something that we call one of our core values. By stating it is a value, but not spending time on it, we undermine our messaging.

The most common mentions were ETHICS IS A SKILL and RESOURCEFULNESS followed by CREATIVITY. These findings validate the findings in the previous section.

5. Did you feel you had enough time between sessions to implement what you learned?
9. Which of the following schedule scenarios would be best for your schedule and learning?

<table>
<thead>
<tr>
<th>Item</th>
<th>Overall Rank</th>
<th>Score</th>
<th>Total Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 week course, 1 session/week for 1.25 hours</td>
<td>1</td>
<td>48</td>
<td>18</td>
</tr>
<tr>
<td>3 month course, 1 session/month for 2.5 hours</td>
<td>2</td>
<td>34</td>
<td>18</td>
</tr>
<tr>
<td>1 week course, 2 half-day sessions</td>
<td>3</td>
<td>26</td>
<td>18</td>
</tr>
</tbody>
</table>

There is no evidence to suggest that an hourly meeting once a week is not an effective cadence or model going forward.
7. What was it like to participate in the program online? What aspects of the online instruction worked well for you and what are your suggestions for improving the online training experience? (Selected Responses)

<table>
<thead>
<tr>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online was just fine. I'm confident it will work well. Breakouts were effective and brief. I enjoyed mostly the direct instruction from Aaron.</td>
</tr>
<tr>
<td>I thought online learning worked well and I liked the convenience of being able to participate from home. I liked the breakout rooms but occasionally conversation felt a little forced. Sometimes it's difficult to discuss personal ethical dilemmas with strangers. I think it might be helpful to be given scenarios and specific questions to discuss regarding those scenarios.</td>
</tr>
<tr>
<td>I liked the small groups- but the lead-in was often confusing and we would spend the first 30-45 seconds trying to figure out what to do... I suggest you find a way to simplify the instruction prior to the small group- don't explain, re-explain, then explain again- make it short and succinct with specific direction.</td>
</tr>
<tr>
<td>I think it worked out really well. Especially with the break out rooms. The only thing I would say could improve is knowing how much time to allow people to share in their groups. There were times when there was too much time and other times where only a couple could share before time ran out.</td>
</tr>
<tr>
<td>I really enjoyed the smaller break out groups. It felt a little less intimidating and we were able to participate in a more intimate climate. It would be helpful to leave the questions up a bit longer that we were to discuss in our smaller break out groups.</td>
</tr>
<tr>
<td>The breakout groups were great to share personal insights. The once a week schedule was also the right cadence of the instruction.</td>
</tr>
<tr>
<td>I thought it was nice to be able to get our group together online. Online training environments can be challenging, but I'd actually prefer taking this course online than in person. I'd reduce the sessions to one hour every other week.</td>
</tr>
</tbody>
</table>

No negative feedback on the online experience generally. Breakout Rooms were the best or the worst part of the experience. Making them smooth will be a lynchpin moving forward. Many appreciated the convenience of online training.
8. Please explain your answer. What about Ethical Leadership Online was superior or inferior to other training programs?

<table>
<thead>
<tr>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>I haven't done other ethics training programs. But the content was relevant to the topic and covered quickly which I value.</td>
</tr>
<tr>
<td>I really enjoyed the networking aspect of it getting to know detailed experiences of the people we had breakout sessions with.</td>
</tr>
<tr>
<td>Ethical Leadership Online was excellent. I felt the program was extremely useful in helping me develop tools that can be applied in the workplace as well as my personal life. I would highly recommend to anyone. I wish everyone was required to take this course!!!!</td>
</tr>
<tr>
<td>I think everything worked out great. They utilized Zoom well and there weren't any big hiccups as far as I could see.</td>
</tr>
<tr>
<td>The training pursued participation which is a great way to share and learn from you as well as other participants</td>
</tr>
<tr>
<td>Having the instruction done specifically with just our company made a big difference. If it were intermingled with other businesses, it would not have been as impactful.</td>
</tr>
<tr>
<td>This was one of the first and only online leadership trainings I have participated in so I can't really compare it to others.</td>
</tr>
<tr>
<td>I felt that it wasn't any different from any of the classes or programs I've been involved with besides this one.</td>
</tr>
</tbody>
</table>

Most respondents did not feel like they had anything to compare ELO to
10. Compared to other training you have participated in, how would you rate our Ethical Leadership Online program?

<table>
<thead>
<tr>
<th>Count</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>1</td>
<td>9</td>
</tr>
</tbody>
</table>

Given the responses to the previous prompt, this data is difficult to interpret.

11. You were able to participate in a free version of Ethical Leadership Online as a beta user, would you have paid (or have your organization pay) for the program? Why or why not?

<table>
<thead>
<tr>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I would pay for the program. I feel that it was helpful and very thought provoking. I enjoyed the course and have found it very helpful in many aspects of my life.</td>
</tr>
<tr>
<td>No - I can get the same information from many books on my bookshelf.</td>
</tr>
<tr>
<td>Maybe. We would need stronger leadership and expectations by the company leadership.</td>
</tr>
<tr>
<td>I would definitely pay for a program and would encourage other members of our organization to participate in a program. Would hope/look to provide an experience for people at different levels/experience to maximize the experience for them.</td>
</tr>
</tbody>
</table>
The responses were overwhelmingly positive towards this being a paid course with economic value.

Interview Protocol

Short 15 minute interviews with selected participants.
Two from each session.
Notes were typed into a spreadsheet during the interview.

Interview questions:
- Was the seminar useful in solving workplace problems? Why or why not? Which problems?
- Who would you recommend this training to and why?
- What were the most impactful activities or moments? What stuck with you?

Interview Analysis

The facilitator had a discernible difference in the training. The Tuesday group frequently referenced the facilitator as an important and key part of the training while the other group did not mention the facilitator as a key part of the experience. This Thursday group was all from the same company and used this exercise as an opportunity to bond with members of the company in diverse locations and during a challenging economic time. The Thursday interviewees also had a much harder time remembering conceptual material from the program when compared to the Tuesday group. No interviewees felt the program was going to make immediate impact in the workplace but was preparing themselves and their organizations for future problems.

Full Interview Notes

<p>| Was the seminar useful in solving workplace problems? Why or why not? Which problems? | Who would you recommend this training to and why? | What were the most impactful activities or moments? What stuck with you? |</p>
<table>
<thead>
<tr>
<th>Name</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dave</td>
<td>no current problems. framework to deal with future problems. opening dialogue around ethics. more top of mind in our company. ethics can be trained, not just an inherent thing. who would you not recommend this training to? i like it. it is important for small businesses to think about these things early. i learned the most during the times aaron was talking as opposed during the breakouts. the breakouts broke things up a bit. the most memorable parts were aaron and his experiences. just listening to aaron. the idea of complacency, not being complacent and assuming somebody else will do something about it. i had a similar experience. Paterno story. good material, no negative critics. i liked the cadence, 1x a week. The breakouts were up and down in quality. they needed to be moderated. consistent every week would be more easy to schedule. worry about keeping attention for 2 hours.</td>
</tr>
<tr>
<td>Lorna</td>
<td>absolutely. i enjoyed it. well into career, definitely learned things and was reminded of things. the importance of things. afforded the opportunity to reinforce. the need to be diligent. timely for me as a reminder to formally and thoughtfully re engage on it. loved the way aaron younger people with career development needs. helpful for more advanced. growing leaders. the product needs to be tailored. i was talking to people in my role, some people not. have people working on the same issues and doing similar roles. reminded me to think about what it's like for the other person. am i asking unethical things of people? reminded me of things i need to be thoughtful of. CAM. personal code of conduct. Could and Should shift in mindset. i talk about this with other people. i look forward to every tuesday. personal growth needs. helped me think differently and specifically and purposefully about my interactions and engagements with other people around me. tremendous opportunity in healthcare compliance. aaron had a thoughtful and impactful approach and presence.</td>
</tr>
</tbody>
</table>
presented. super super awesome. learned and reminded. i looked forward to every meeting. had trouble applying things in-between. longer times each meeting. wanted more meetings. more time to learn and apply in the workplace. not solving specific problems in the workplace yet. the cadence was quick.

| Tom       | nice to know that our employees ethical leadership was a priority. sending a message of values. preventative maintenance. knowing leadership is thinking ethically they will feel safe to put things up the chain. | Every organization can benefit from the ethics core. spending time on ethics as a core part of culture. i need to spend time one it. putting focus on a cultural value. | breakouts were nice as an owner of the company to talk to everyone. practicing with tools. discussing in breakout sessions with employees brought everyone together. | the one a week was perfect. it was story and experience based. one hour every two weeks maybe. it's a little theoretical. homework will be done the night before. totally served its purpose. gave us time to spend time without key employees in some way outside the norm. they |
Table 2

Click and open rates for post-seminar reinforcement emails

<table>
<thead>
<tr>
<th>Email</th>
<th>Open Rate</th>
<th>Click Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Legacy</td>
<td>58.3</td>
<td>11.1</td>
</tr>
</tbody>
</table>
Analysis:
Open rates started very high but decreased with time.

**Table 3**
*Open and click rates for mid-session reinforcement emails.*

<table>
<thead>
<tr>
<th>Email</th>
<th>Open Rate</th>
<th>Click Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thurs 1</td>
<td>39.1</td>
<td>8.7</td>
</tr>
<tr>
<td>Tues 1</td>
<td>78.9</td>
<td>5.3</td>
</tr>
<tr>
<td>Thurs 2</td>
<td>30.4</td>
<td>4.3</td>
</tr>
<tr>
<td>Tues 2</td>
<td>30.4</td>
<td>4.3</td>
</tr>
<tr>
<td>Thurs 3</td>
<td>39.1</td>
<td>4.3</td>
</tr>
<tr>
<td>Tues 3</td>
<td>84.2</td>
<td>10.5</td>
</tr>
<tr>
<td>Thurs 4</td>
<td>78.9</td>
<td>21.1</td>
</tr>
<tr>
<td>Tues 4</td>
<td>73.7</td>
<td>0.0</td>
</tr>
<tr>
<td>Thurs 5</td>
<td>30.4</td>
<td>0.0</td>
</tr>
<tr>
<td>Tues 5</td>
<td>78.9</td>
<td>0.0</td>
</tr>
<tr>
<td>Thurs 6</td>
<td>34.8</td>
<td>0.0</td>
</tr>
<tr>
<td>Tues 6</td>
<td>78.9</td>
<td>0.0</td>
</tr>
</tbody>
</table>
Not all emails included a call to action that involved a click.

Analysis:
The Tuesday group had a much higher open rate than the Thursday group. Open rates remained very consistent.

**Budget and Timeline**

**Proposed Budget**

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Hosting/Year</td>
<td>$300</td>
</tr>
<tr>
<td>Technology Consulting</td>
<td>$200</td>
</tr>
<tr>
<td>Labor</td>
<td>$54,000</td>
</tr>
</tbody>
</table>

**Actual Budget**

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Hosting/Year</td>
<td>$15/month</td>
</tr>
<tr>
<td>Technology Consulting</td>
<td>$0</td>
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<tr>
<td>Labor</td>
<td>$1,993.94</td>
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</table>

The discrepancy in the budgeted hours is an error in the estimate that provided the hours expected to complete the masters thesis including prospectus, not the project itself.

**Project Timeline**

Proposed Timeline:
- Live seminar: May 15-30
- Microlearning Reinforcement Program: May 15-30 - July 15-30

Revised ELO Timeline:
- # EA Ethical Leadership Course (0/39)
## Invitations

- 05/14/2020 [ ] Invitation Survey Created
- 05/14/2020 [ ] Invitation Email Drafted
- 05/15/2020 [ ] Invitation email send to Eric and John

## Participant Prep

- 05/18/2020 [ ] Decline email drafted for too many signups
- 05/18/2020 [ ] Welcome email drafted
- 05/25/2020 [ ] Welcome email sent on signup/when selected
- 05/25/2020 [ ] Participant List created and posted on GDocs
- 05/25/2020 [ ] Day-before email drafted
- 05/25/2020 [ ] Week-before email drafted
- 05/29/2020 [ ] Decline emails sent
- 06/02/2020 [ ] Week-before email sent
- 06/08/2020 [ ] Day-before email sent

## Week 1 - Ethics as a Skill - June 9

- 05/20/2020 [ ] Week 1 Zoom poll drafted
- 05/20/2020 [ ] Week 1 post email drafted
- 05/20/2020 [ ] Ethics as Skill slide deck
- 06/11/2020 [ ] Week 1 post email sent

## Week 2 - Values Mastery - June 16

- 05/27/2020 [ ] Week 2 Zoom poll drafted
- 05/27/2020 [ ] Week 2 post email drafted
- 05/27/2020 [ ] Values Mastery slide deck
- 06/18/2020 [ ] Week 2 post email sent

## Week 3 - Resourcefulness - June 23

- 06/03/2020 [ ] Week 3 Zoom poll drafted
- 06/03/2020 [ ] Week 3 post email drafted
- 06/03/2020 [ ] Resourcefulness slide deck
- 06/25/2020 [ ] Week 3 post email sent

## Week 4 - Creative Judgment - June 30

- 06/10/2020 [ ] Week 4 Zoom poll drafted
- 06/10/2020 [ ] Week 4 post email drafted
- 06/10/2020 [ ] Creative Judgment slide deck
- 07/02/2020 [ ] Week 4 post email sent

## Week 5 - Ethical Influence - July 7

- 06/17/2020 [ ] Week 5 Zoom poll drafted
- 06/17/2020 [ ] Week 5 post email drafted - get mailing addresses for books
- 06/17/2020 [ ] Ethical Influence slide deck
- 07/09/2020 [ ] Week 5 post email sent

## Week 6 - Intentional Culture - July 14

- 06/24/2020 [ ] Week 6 post email drafted
- 06/24/2020 [ ] Week 6 Zoom poll drafted
### Actual Timeline

<table>
<thead>
<tr>
<th>Phase 1: Pre-development</th>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>February 19 - March 4</td>
<td>Discussion of learning outcomes, content analysis, design strategies</td>
</tr>
<tr>
<td>Phase 2: Adjusting to COVID</td>
<td>March 11 - April 8</td>
<td>Design and creation of marketing videos</td>
</tr>
<tr>
<td>Phase 3: Preparing for ELO</td>
<td>April 15</td>
<td>Decision to shift to online modules. Target date set for second week of June</td>
</tr>
<tr>
<td></td>
<td>April 22 - June 10</td>
<td>Development of new learning goals, organizing training modules and collecting content. Building the first two sessions. Discussing reinforcement strategies.</td>
</tr>
<tr>
<td>Phase 4: Running Ethical Leadership Online</td>
<td>June 16</td>
<td>First ELO Session</td>
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<tr>
<td></td>
<td>June 17</td>
<td>Team meeting, review of session 1 &amp; prep for sessions 2 &amp; 3</td>
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<tr>
<td></td>
<td>June 18</td>
<td>Session 1 Group 2 of ELO</td>
</tr>
<tr>
<td></td>
<td>June 22</td>
<td>Session Prep Meeting</td>
</tr>
<tr>
<td></td>
<td>June 23</td>
<td>Session 2 Group 1</td>
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<tr>
<td></td>
<td>June 24</td>
<td>Team meeting, review of session 2 and prep for sessions 3 &amp; 4</td>
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<tr>
<td></td>
<td>June 25</td>
<td>Session 2 Group 2</td>
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<tr>
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<td>June 30</td>
<td>Session 3 Group 1</td>
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<td></td>
<td>July 1</td>
<td>Team meeting, prep for sessions 4 &amp; 5</td>
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<tr>
<td></td>
<td>July 2</td>
<td>Session 3 Group 2</td>
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<td>July 7</td>
<td>Session 4 Group 1</td>
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<tr>
<td></td>
<td>July 8</td>
<td>Team Meeting, prep for sessions 5 &amp; 6</td>
</tr>
<tr>
<td>Date</td>
<td>Event Description</td>
<td></td>
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<tr>
<td>July 9</td>
<td>Session 4 Group 2</td>
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<tr>
<td>July 14</td>
<td>Session 5 Group 1</td>
<td></td>
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<tr>
<td>July 15</td>
<td>Team Meeting, prep for session 6, discussed workbook prototypes,</td>
<td></td>
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<tr>
<td>July 16</td>
<td>Session 5 Group 2</td>
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<tr>
<td>July 21</td>
<td>Session 6 Group 1</td>
<td></td>
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<tr>
<td>July 22</td>
<td>Team Meeting, discussed workbook prototypes and final survey</td>
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<tr>
<td>July 23</td>
<td>Session 6 Group 2</td>
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<td>July 28</td>
<td>Final Survey distributed to participants</td>
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<tr>
<td>August 12</td>
<td>First post-seminar reinforcement email</td>
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</tr>
<tr>
<td>October 2</td>
<td>Final post-seminar reinforcement email</td>
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</tbody>
</table>

Phase 5: Evaluation and Reinforcement