Richard and Elizabeth Henes
Endowed Professorship

FY-2023 Annual Report

submitted by
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This report summarizes initiatives and related activities during FY-2023 supported and/or inspired by the Richard and Elizabeth Henes Endowed Professorship. I am grateful to the Henes family for their support that aligns with my passion for education program development that instills in our graduates a growing mindset in the areas of engineering practice and leadership. Coupled with my serial entrepreneurial background, authorship of professional development books in commercialization engineering and leadership practice, and recent founding of a leader development business focused on young adults, it is my intent use the endowment-provided resources to explore, conceive, develop, and deliver adoptable value within the ME-EM and MTU curricula, always focusing on differentiating MTU in the higher education market.

Picking up from last year, the graduate capstone experience was revived with a third design refinement and, by inclusion with a new leader development initiative, with the potential of a certificate in Engineering Design, Manufacturing, and Leadership Practice (EDMLP). The certificate in Innovation Engineering has been tabled, though the Innovation Engineering course could be developed at some point. Finally, the Capstone Design Program Endowment initiative has been on hold this year. The following elaborates on what has been done this year.

1 Leader Development Series

As part of my entrepreneurial work outside the university, in Spring 2020 I began exploring the potential market for young-adult leader development to prepare future leaders with non-buzzword leadership knowledge, both principles and experiential, not theoretical. I then developed a plan for what a business might look like and, in Fall 2020, initiated stakeholder discovery. With validation of the need and value potential, pilot offerings commenced in May, 2022. With very positive participant response, Evolvent Leader Development, LLC (ELD) was formalized in Spring 2023. I mention this here because, like all my entrepreneurial endeavors, I seek mutual benefit for MTU.

Come December, 2022, upon completion of the second sequential 12-week “season” piloted outside MTU and with the operations platform built within the business, I explored the potential of offering the content at MTU in a for-credit offering with ELD providing the content and operations management. The result would be a course series where the instructor can focus on where he/she brings value — interaction with the students — by relegating the “other work” of content provision, schedule management, and regular emailing of thinking and reading prompts to ELD as the content partner. Given the goal of building knowledge-driven mindset in the participants, which is a gradual endeavor, by design and with intention the Evolvent Leader Development Series (LDS) is a long-duration series. Furthermore, with the target market being young practicing professionals — engineers initially — the series is designed to be fully remote and low-time commitment, the latter making each “season” suitable for a single academic credit. As such, the nine “seasons” in the Evolvent LDS portfolio could be offered at MTU as a rolling series of one-credit courses that a Ph.D. student, for instance, could take over a span of three years; an M.S. student could take six in their two years and a senior B.S. student could take three, each with the potential to continue with employer support through continuing education.

Where in the curriculum to place it has evolved in my thinking and it is starting at the graduate level for research-active students while also being open to select, high-performing, high-potential seniors by invitation. It was taught as MEEM 5990, a special topics course number, in the Spring-2023 semester. Four graduate students and five select undergraduate students who had just
finished the first semester of ME-EM Senior Capstone Design (SCD) took the course; six other coursework-M.S. students also enrolled toward the pursuit of the aforenoted EDMLP certificate, but backed out at the last minute (described later). Consistent with all post-season surveys outside the university, all of those who responded (8 of the 9) said they want to continue and would recommend this to someone close to them (see table below); most had prior commitments and/or were in the process of moving to jobs after graduation and could not take Season 2 in the summer. Three students — one grad and two outstanding undergrads completing SCD in the summer — are taking Season 1 as reflected in the table below. For reference, more information from ELD on the LDS is attached at the end of this report.

1. Would you want to participate in the next Season?
2. Would you feel comfortable at this point, based on your experience thus far, recommending this to a good friend or colleague?

<table>
<thead>
<tr>
<th>Term</th>
<th>Season</th>
<th>#</th>
<th>Participate Next Season?</th>
<th>Recommend to Others?</th>
</tr>
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<tbody>
<tr>
<td>Summer 22</td>
<td>1: non-credit</td>
<td>6</td>
<td>All 6 yes (but 2 had conflicts)</td>
<td>5 yes, 1 needed to see more</td>
</tr>
<tr>
<td></td>
<td>2: non-credit</td>
<td>4</td>
<td>All 4 yes (but 1 changing job &amp; relocating)</td>
<td>4 yes (incl. “need to see more” above)</td>
</tr>
<tr>
<td>Fall 22</td>
<td>1: for-credit (MTU)</td>
<td>9</td>
<td>All [of 8 responses] yes (5 need to wait)</td>
<td>All [of 8 responses] yes</td>
</tr>
<tr>
<td></td>
<td>3: non-credit</td>
<td>3</td>
<td>All 3 yes</td>
<td>3 yes</td>
</tr>
<tr>
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<td></td>
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</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

For credit surveys done after grades are submitted.

Conversations with David Lawrence have been ongoing since Fall 2022 regarding offering this in Global Campus. At this time David is awaiting a formal information piece being developed by ELD to use in opening discussions with his network of companies getting involved in Global Campus for continuing education of their employees. A couple companies had already included leader development as one of their top areas of need, which, when hearing that in Fall 2022, nudged me to taking action sooner rather than later to bring the Evolvent LDS to MTU. The plan at this point is to offer Season 2 in Fall 2023 for those grad students who took Season 1 in the spring or summer and possibly some of the graduated undergrads (including two this summer) who might have employer continuing education resources to support them. I will be exploring as well pushing the invitation to “select, high-performing, high-potential seniors” to precede their entry into Senior Capstone Design rather than during their second semester of that sequence. My hypothesis is that having about 20% of the class with Season 1 under their belt coming in, distributed across teams, will enhance team performance and, thus, program/“business” performance.

2 Graduate Capstone Experience — Take 4

This initiative was initially undertaken to expand ME-EM’s decades-long recognized strength in practice-based engineering education. I aimed to extend the undergraduate capstone design experience to a graduate capstone design experience. Last year, the general idea was developed to a level of detail where it could be shared with the target market segment of international M.S.-coursework students. These are students who have typically not had a capstone design experience as an undergraduate. In parallel, a pro-forma financial model and operational design were drafted as an initial assessment of financial and operational viability. A major operational driver was to capitalize on the underutilization of ME-EM student shop space in the summer while avoiding its heavy use period — spring semester. Financially, summer tuition share along with industry sponsor/customer fees would have to be sufficient to support the faculty and shop staff involved.
in delivering the summer portion of the course. Since many industry projects these days involve both mechanical and electrical engineering disciplines, the graduate advisor and graduate program director in the Department of Electrical and Computer Engineering (ECE) were also engaged; they expressed a strong interest in their students being involved and promoted it to their students.

After three rounds of surrogate MVPs (minimum viable products) in the form of a two-page information piece being circulated to graduate students, each round revising the design based on market findings, it was tabled. The root-cause is international students’ desire to be away from campus in the summer at industry internships, not on campus as would be required for prototyping and testing. This market need was misaligned with the summer shop underutilization enabler.

A ME-EM colleague of mine, Dr. Radheshyam Tewari, had already proactively offered insight on the international student market segment, and this year become instrumentally involved. In fact, seeing great value in a CGD experience for international students, it was as much him as it was me that resurrected the GCD concept. And with the leader development series initiative taking shape, I thought about the larger picture of a certificate that brought together leadership growth along with the GCD courses, which have an emphasis on manufacturing, an area often of interest to international coursework-M.S. students. With Dr. Tewari’s knowledge of the graduate curriculum and ways it can lay out in various structures over three semesters, we reworked the design such that GCD would be expanded to six credits with four credits in the summer, but done remotely to facilitate internships, and two credits in the fall when students are back to work in the shops. Since the fall-finishing SCD cohort is smaller than their spring-finishing counterpart, the shop could handle some added workload in the fall. Thus, operationally it worked, and a revised pro-forma financial model suggested the same or better from that perspective.

Dr. Tewari and another faculty member teaching graduate manufacturing courses approached and incentivized their classes to gather an audience for an informational meeting. With 36 attendees over two offerings, each filling out a survey at the end, approximately half had an interest as well as sufficient credits remaining to pursue the nine credits of GCD plus LDS courses that, along with six other credits would fulfil the anticipated 15-credit Engineering Design, Manufacturing, and Leadership Practice (EDMLP) certificate. Six students ultimately signed up for the Spring-2023 offering of LDS 1 to get started. Unfortunately, just before the first meeting of that class in week-2 of the semester, five backed out. The reason is that by taking five credits in the summer they would complete their degree in the fall (after three academic terms plus summer) rather than being able to extend their degree into a fourth semester. They desire to have as much time as possible to land a job in the U.S. before completing their degree and having to leave the country. The benefits of the EDMLP certificate with the GCD experience and leader development were outweighed by the risk of not getting a job before the end of their third and would-be final semester. Given their priorities, I have decided this is likely not the audience for a resource-intensive investment that both CGD and the leader development series are. The initiative has been tabled again.

3 Capstone Design Program Operations System Migration

The ME-EM Senior Capstone Design (SCD) Program has as many as 200 students per year working on 30 – 40 projects under the advising team of 8 – 10 individuals and participation of more than 70 others as design review panelists. With two cohorts — fall-spring and spring-fall — overlapping and at this scale, smooth operation that does not inhibit student progress and allows
students to focus on high-value activities requires more than a “human running it in manual mode.”

When I assumed the role as the first director of the ME-EM SCD Program in 2009, I began developing a set of operational processes and a suite of tools to support those processes and all program stakeholders. Over the first three years a Microsoft Excel-based operations management platform was built, including VBA (Visual Basic for Applications) code behind it. Along with it were Microsoft Office templates for all documentation, allowing students to focus on the content rather than formatting, while also creating consistency in document structure and alignment to grading forms developed for use by those evaluating teams’ work-product.

Now, ten years later, there are various other ancillary tools that have been developed but not well integrated. More importantly, having seen the students’ hunger to work more collaboratively in their documentation, and grading already having moved from paper-based Scantron forms implemented in 2010 to Google Forms in the throes of COVID, a full move to Google Workspace was contemplated. With a Spring-2022 piloting of Google Docs and Google Slides templates to replace, respectively, select Microsoft Word and Publisher templates, the result was very well received by the second-semester students who had now experienced it both ways. Come July, 2022, the start of this reporting period, a major initiative was begun to migrate the Excel-based operations management platform to Google Sheets, with Google script replacing VBA, and all templates converted to Google Docs and Google Slides. This was done in a strategic sequence so that the major year-long templates would be ready for roll-out in September with other templates translated and more automation functionality implemented gradually over the course of the year. This timely response was enabled by Google Sheets best practices and Google script learning I had personally gained while developing the noted Evolvent LDS operations platform.

Among many near- and long-term benefits from managing operations to succession planning, this migration allows students to truly collaborate simultaneously in real time across all their project documentation. And with the richness of the Google script cloud-based environment with ties into Gmail, Google Forms, Google Drive, and Google Calendar, the new Capstone Design Program Management system, once fully complete in Fall-2024 (current target), will be far better than its predecessor with greater automation, flexibility, integration, robustness, and consistency. This will allow the program director, me now and my successor later, to focus less on keeping up with operational checkboxes and more on higher-value activities engaging the students and advising team, while also facilitating expansion of the program (see FY-2022 report, §3) without no net increase in program director workload.

4 National Exposure

As described last year, the premier conference for the capstone design community is the biannual Capstone Design Conference held in June. Through COVID cancellations, a virtual conference was held and since has been retained in the off years as a one afternoon virtual conference with two sequential tracks each with three parallel sessions. I was invited to serve as a panelist on a session addressing individual student accountability. There were about 150 attendees overall; about 80 of them attended the panel I was on. During that I was able to share much insight on how we assure individual accountability, including talking about the “Fantasy Capstone” tool developed in the ME-EM Senior Capstone Design Program.

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When I signed up [for Season 1] I didn’t really know what I was going to get out of it. I’ve gotten a ton from it and changed my personality to the point that my wife/family notices. It’s been so much easier to “deal” with my brother, and it’s given me an awareness of what I’m doing/saying and how it affects others. (Honestly, I never realized how self-centered I was).
— Ben Lutz, Product Development Engineer (after Season 3)

In 2020, about 130,000 B.S. degrees in engineering were awarded in the U.S.\(^1\) That means there might be, conservatively, 500,000 in their first five years of engineering practice. Now imagine how the world might be different if just five percent of those young adults, by the time they enter year-six of engineering practice, have spent three years gradually developing a leader’s mindset, experiencing a transformation like Ben L. did in just one year. Imagine how it would be after they have traversed twenty more years of a now-established leadership journey of intentional and regular study and implementation of knowledge and skills? Imagine how it would be if we had more engineers — true, trained, and experienced problem solvers — in leadership roles not only in our companies but in our communities and our country, even in government… at all levels.

That’s Evolvent’s vision — a world changed with sound and true engineer-leaders evolving from their start, then extending our model beyond just engineers to include the best of all walks of work and life. Why? Because leadership practice is important. Whether family, community, church, company, or country, “everything rises and falls on leadership.”\(^2\) The rises come from leadership that is sound and true, not buzzword leadership and not figure-it-out-as-you-go leadership. Sound and true leading is first and foremost a matter of mindset — how you think not what you think. Mindset, and the knowledge that feeds it, does not develop in a one-and-done class and a workshop now and then. It evolves over a lifetime. But like anything that evolves, it starts with those crucial first steps and continues only through the discipline of continuing forward motion — regular study and implementation.

The world needs the coming generation to play their part, and the best of them need to get started on the right foot, launching a lifelong leadership journey that will affect the world and people around them. But most services are playing in the here and now of executive coaching and middle-management development, focused on tools and one-on-one mentoring. That’s why Evolvent was founded, and that’s our mission — providing an effective structure and setting that supports a patient, generational, legacy-like change in young adults that prepares them to be future leaders, not doing it with more buzzword or theory, but through deep human learning of the knowledge and skills of leadership practice upon which mindset develops. We support the very best in taking their first steps of something much bigger than a one-and-done quick fix… their first steps of a journey that leads to leading, sound and true. We do this by blending the model of executive peer-groups with well-established methods for transformational, deep-rooted learning. Working in peer-groups of 4 – 6, those future leaders meet weekly to learn and grow together. The small-group discussion model of learning goes deep, and that is nurtured further with weekly, emailed “look-back, look-around, look-ahead”\(^\text{SM}\) cues from their guide who also joins them in their meetings. Their guide is not a facilitator who just manages the process or maintains order in the meetings. The guide brings value beyond that by way of seasoned knowledge and experience on the subject matter and in leading itself.

Offering nine sequential twelve-meeting “seasons” of guided peer-to-peer discussions with thought-provoking cues between them, the process is evolvent at many scales, from a single thought making its rounds in the peer-group and evolving as it goes, to a participant’s thinking over the course of each twelve-meeting season, and from season to season toward a mindset that evolves over the years to come. This is resource-intensive because this is no place to skimp given what’s at stake — the shaping of a strong foundation upon which future leaders learn and launch their lifelong leadership journey.

\(^1\) U.S. Department of Education, National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS) Completions.

MEEM 5990 — Leader Development Series

[nine sequential “seasons” total • 1 credit each • to be offered spring/summer/fall rolling]

Why

• The world needs ambitious-yet-disciplined “young adults” (early 20s to 30±) to launch a lifelong journey of mindset growth through regular study and implementation of sound and true leadership knowledge and skills

• Gain short-term and long-term whole-life impact — “family, community, church, company, country”

What

• Peer-groups of 4 – 6 from a particular personal-life or professional domain (engineers here)
  • domain-grouping promotes productivity through some commonality in thinking styles and “daily domain-life” language
  • group-size brings diversity in perspective while maintaining plenty of time for each peer-group member to substantively participate in the discussion

• Weekly activities (starts in semester-week 2 in fall/spring, Track-A+B week-1 in summer):
  • “read-and-ponder” assignment (~45 min to read • ~30 min to ponder and jot down thoughts/questions) cued via email
  • followed by a meeting for peer-to-peer, discussion-based learning with a seasoned “guide on the side” (80 min)
  • followed by post-meeting “look back, look around, look ahead” cues via email

• Major assignments: scenario-based, no-slides, verbally-delivered leader’s message
  • midterm: reflective, integrating “what I have learned thus far” (6 – 7 min • followed by 5 – 6 min discussion)
  • final: look-back/look-ahead, integrating “what more I have learned” and/or “my next area of growth and plan” (8 – 9 min • followed by 5 – 6 min discussion)

How

• Partnering with content and operations-platform provider Evolvent
  • a startup business conceived in 2020 and founded in 2022 by Dr. Bill Endres as a place “where future leaders learn and launch… together”
  • commenced a pilot in summer 2022 with six recent MTU engineering grads

• A focus on leadership practice and its importance, not theory and not the “buzzword,” with a focus on the “being” and “doing” of leadership

• Now being offered for credit in academic partnerships, exclusively (at this point) at MTU in ME-EM
  • open to Ph.D. students, research-M.S. students, and select undergrads by invitation of the instructor
  • four grad students and five invited undergrads took the Season-1 pilot in Spring 2023

• Nine sequential seasons available
  • all done remotely via web-conferencing
  • courses intended to become MEEM 5921, …, 5929 plus plans to create a certificate in “Engineering Leadership Practice”

Reading-source samples:

• Season 1 – Important Service
  • Leading with Others for Others: Part 1 — Launch a Lifelong Journey… Your World Needs It by William J. Endres [6 weeks]
  • The Servant: A Simple Story about the True Essence of Leadership by James C. Hunter [6 weeks]

• Season 2 — Growth Stages
  • Launching a Leadership Revolution: Mastering the Five Levels of Influence by Chris Brady & Orrin Woodward [9 weeks]
  • Leading with Others for Others: Part 2 — Some of The Doing by William J. Endres (Intro – Chapter 2) [3 weeks]

• Season 3 – Human Relationships
  • How to Win Friends and Influence People by Dale Carnegie [10 wks]
  • Leading with Others for Others: Part 2 — Some of The Doing by William J. Endres (Chapters 3 – 5) [2 weeks]
Please share what you might say about your experience to someone considering participation.

1. We have all experienced a good leader and a bad leader, but what is it that makes them good or bad? Through this course, you get to first learn the qualities of a leader, and you begin to see how these qualities manifest in those examples of the good and bad leaders, and how they manifest in yourself. Rather than a typical leadership journey, where you are thrust into a position of leadership and scramble to figure out what works, this course enables you to develop an understanding of the elements of leadership where you are strong, and where you need improvement. You will see these elements everywhere in your life, and by talking with your classmates in an open environment, you share and develop your thoughts in a welcoming environment where intellectual humility is abundant.

2. I became much more self-aware after just one season of this course. I also learned so much about leadership and broke down ideas of what I used to think leaders were like. It is a motivating class with rich conversations and you will leave it rethinking how you treat everyone around you.

3. This course forced me to think about things differently, offered new perspectives, and challenged my ability to communicate my questions and ideas. I’m really glad I took this opportunity and know that I have a lot more tools, and confidence, to serve others better moving forward.

4. I’d say that the content covered is great. Nice to be in a group talking about it because you can get others’ perspectives and experiences that are different than your own. Think it’s all relevant content people can relate to and need to hear.

5. LDS Season one will bring things about leading to the surface that you didn’t know existed and challenge the way you currently think about things relating to leading you did know existed. The two books studied in the course offer two different perspectives on leading with some overlap that allows the big points to be understood by people with varying positions. This course will change the paradigm you posses with respect to leading in a extremely valuable way. I would highly encourage you to take the LDS course even if you think you know everything there is to know about leading as you will quickly learn that there is always more to learn. And if you are new to leading, there is no better place to start than this course, and no better time than now.

6. This class really makes you think internally and externally about how you conduct yourself and how others see you. I think different sections resonate with everyone and it was interesting to see different perspectives.

7. I believe it really is worth it! I’ve gained confidence in decision making and ethical/professional reasoning over the course of the semester, and I encourage anyone looking to further their career to look into this leadership course.

8. Good content and the books covered were great. Have an open mind about discussion and do not have any preconceived notions.
the following provides some perspective from all participants thus far

1. Would you want to participate in the next Season?
2. Would you feel comfortable at this point, based on your experience thus far, recommending this to a good friend or colleague?

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<thead>
<tr>
<th>Term</th>
<th>Season</th>
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</tbody>
</table>

For-credit surveys done after grades are submitted.

Please share what you might say about your experience to someone considering participation.

1. This is a great opportunity to connect with other professionals and broaden your perspective on the goings on in your work - both how you behave, and how your leaders behave. It’s a great growing opportunity!
2. A great discussion of leadership topics and shared experience learning. Tangible and applicable to daily life in order to grow knowledge of leadership.
3. I thought it helped me grow my perspective a lot! It’s good to hear other people’s ideas on the topic. I think if you’re looking to grow professionally it’s a good resource to learn more.
4. I know that anyone with the desire and will to better themselves, better their relationships with others, and live a joyful life will find great value in this experience. No matter how old you are or what walk of life you’re currently on I would recommend the course. I’ve learned a lot about myself and a lot about others so far, and am surprised to admit that my interest has been captured and I have a desire to learn more.
5. People who have interest in being a better leader, a better friend, a better parent, and a better human will find great value in this experience. Also, even if you already read about leadership, there is a lot to gain from experiencing that literature with a group of people who are also interested in it. New perspectives and different perspectives and the questions that come from group learning really helped me learn.
6. This course is definitely not perfect, but it doesn’t pretend to be that way. It offers perspectives that I wouldn’t normally have thought applied to leadership. Additionally, the space is given for conversation (bold, italicized), which is the most important aspect of this course.
Please share what you might say about your experience to someone considering participation.

1. Are you interested in joining a leadership development group? We go thru books and have casual discussion about the different aspects of leadership. It mostly gives you knowledge about what a leader is and does, and the discussion helps make it tangible and applicable in daily life. I’ve certainly learned a ton, I didn’t even know what I didn’t know :)

2. I would tell them this a great way to start thinking about and making improvements on leadership ability in a casual environment that fits well with a busier schedule. The readings are easily managed; while, the discussions are what you make of them. In my experience, spending 5-10 extra minutes on top of the reading is all that is needed to feel ready to contribute to a fruitful discussion each week.

3. My experience with the leadership development series has been great. It’s sparked an interest in leadership that will last a lifetime and I know that when I stop attending this course I’ll have left with a much deeper understanding of the topic of leadership and what it really is. I’d recommend the course to anyone who wants to add value to their careers, their families, and their life as a whole. My recent study of leadership has helped me answer some questions I had been struggling with related to my identity as a person, who I want to be, and what I want to do. I think the course would benefit any person of any background that had not studied leadership previously. The group aspect is excellent and I was taken aback by the amount I was able to learn from the experiences shared by others. However, you will probably get as much out of this course as you put into it. This course scratches the surface and really got me inspired to learn more.

What you learn about leadership has the ability to impact every single aspect of your life in a positive way. It can provide extraordinary value to you and to others close to you. It would be a shame to move through life without being conscious of the principals of leadership. I would highly recommend this course for its overall goal, its structure, and its manageable workload.