



Scrum Alliance®

Certified Agile Leadership (CAL) Program

by the Scrum Alliance Agile Leadership Learning Objectives Committee

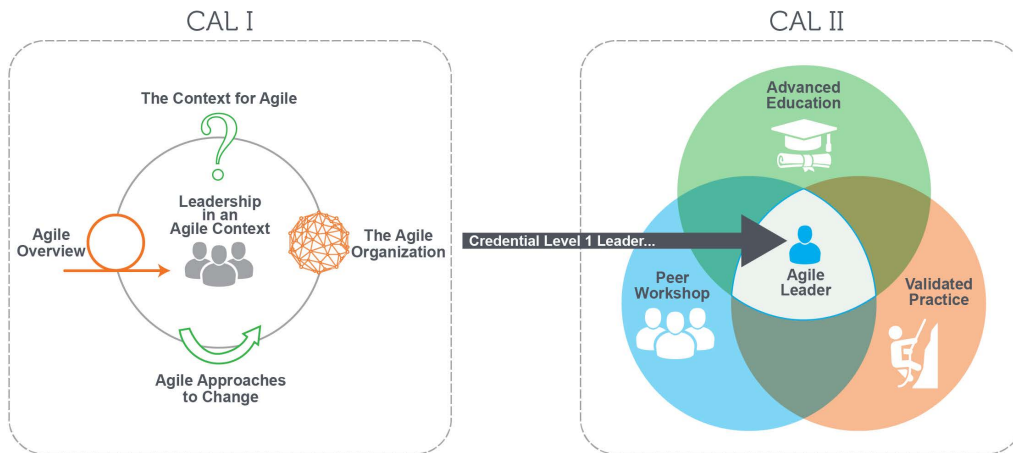
The vision of Scrum Alliance is to make the values and principles of Agile accessible to every leader, regardless of prior education and experience, by making known the why, what, and how of Agile in a pragmatic and experiential approach.

The Scrum Alliance Certified Agile Leadership (CAL) program is an **education and practice-based program** with the goal of developing Agile leadership competency and maturity in order to increase the effectiveness of a leader in complex, uncertain, and rapidly changing conditions.

The CAL program provides a framework for vetted education providers to build flexible learning programs and provides a guide path for participants to know they are receiving high-quality, dependable, and experienced-based education. The program includes introductory education to bring awareness of the focus and journey of the Agile leader as well as an advanced path of validated learning and practice for the leader to continue the learning journey. Each of these levels includes a credential of completion:

- **CAL Credential I** – The CAL I program is an introductory, education-based program that consists of learning objectives across five categories. The goal of CAL I is to bring awareness of Agile leadership thinking, focus, and behaviors and to start the Agile leader on their learning journey. The CAL I credential is achieved upon successful completion of the CAL I learning objectives.
- **CAL Credential II** – The CAL II program is an advanced education, validated practice, and peer-based sharing program that consists of learning and practice across three categories. The goal of the CAL II is to guide leaders in deepening, applying, and sharing their Agile leadership learning. The CAL II requires a CAL I, as well as successful completion of the advanced education, validated practice, and peer-based sharing requirements.

Certified Agile Leadership Program



A visual depiction of the overall program

5 learning objective categories of the CAL I -> 3 components required in the CAL II

This program takes the following into consideration:

- Agile leadership is a broad topic, currently without a shared definition or understanding.
- Organizational agility cannot exceed the level of personal leadership agility of those with the most influence in an organization.
- Because Agile leadership involves ongoing personal development, it is not something that can be mastered in a single training course.

Program goals

- Develop Agile leadership competency and maturity, which increases effectiveness of a leader in a complex and rapidly changing environment
- Balance education, practice, and peer collaboration
- Flexible for participants and education providers
- Multiple touch points to apply and deepen learning

An Agile leader . . .

- Operates effectively amid uncertainty, complexity, and rapid change
- Is knowledgeable about Agile values, approaches, and practices
- Surfaces more creative solutions through increased self-awareness, a growth mindset, and engaging others
- Aligns and empowers teams toward delivering more customer value
- Personally integrates feedback and experiments, and adapts their ways
- Takes a collaborative continuous-improvement approach to organizational effectiveness
- Catalyzes change in others and facilitates organizational change



The CAL program is intended for . . .

- Executives, middle management, and other leaders with organizational influence
- Leaders who support, lead, or interact with Agile teams
- Any leader sponsoring, requesting, or involved with an Agile adoption within their organization

The current requirements to become an approved education provider in this program:

- Any Certified Scrum Trainer® (CST®) or Certified Enterprise Coach (CEC) can deliver the program, provided they have submitted a successful Educator application and can demonstrate competency in educating in all five categories within an established or self-created leadership development framework. *For example, Organization & Relationship Systems Coaching (ORSC), International Coaching Federation (ICF), Co-Active Coach Training (CTI), Leadership Agility 360, The Leadership Circle, The Leadership Gift, etc.*

Definitions and acronyms

- **LO** – Learning objective
- **CAL** – Certified Agile Leadership (CAL) program
- **CST** – Certified Scrum Trainer
- **CEC** – Certified Enterprise Coach
- **Approved CAL Educator** – An Educator who meets the requirements set forth by Scrum Alliance and who has been validated to deliver predefined learning objectives

CAL I

The goal of the CAL I is to raise awareness in the minds of participants as to the benefits, mindset, skills, and characteristics of an Agile leader. It is an introductory set of topics intended to start (or continue) a journey as an Agile leader.

Participants in CAL I should expect that each learning objective identified in this document will be covered over the course of the program. The model for CAL I is flexible, allowing education providers to deliver the program in a way that will best meet the needs of their customers, including a mix of training and coaching as well as bundling learning objectives in distinct learning sessions.

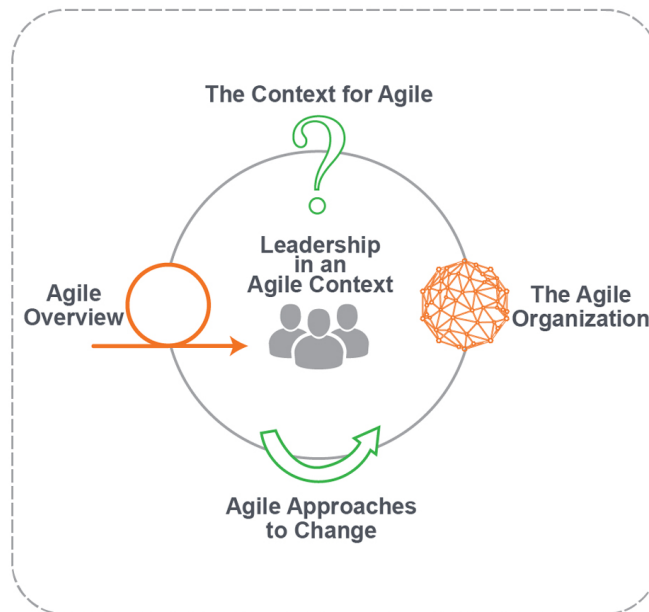
The CAL I learning objectives provide a framework for program development that purposefully avoids recommending specific models and approaches. Education providers are expected to include specific models and approaches that meet these objectives in their programs.

The learning objectives for the program are based on the Agile Manifesto, Scrum, research in leadership effectiveness, and organizational patterns that are effective in complex and rapidly changing environments.

The learning objectives for CAL I cover five categories, which must be delivered over a **minimum of 17 contact hours**. At least half of the contact hours must be in person; the rest may be delivered via other formats (online, virtual, etc.). The program may be contiguous or spread out over time. *A mix of training and coaching is encouraged.* Each category has a specific minimum number of contact hours:

1. The Context for Agile (minimum 2 contact hours)
2. Agile Overview (minimum 3 contact hours) — *may be acquired in prerequisite work*
3. Leadership in an Agile Context (minimum 5 contact hours)
4. The Agile Organization (minimum 4 contact hours)
5. Agile Approaches to Change (minimum 3 contact hours)

Credential Level I



A pictorial overview of the 5 learning objective categories in CAL I

The learning objectives are formatted using Bloom's Taxonomy:

While some learning objectives appear to tell the educator how to teach the concept, that is not the intent. Learning objectives using Bloom's Taxonomy measure what the learner will be able to do upon completing the program. For example, if a learning objective says, "Analyze a concept," that means that when completing the module, the student will be able to analyze the concept, not necessarily that they need to analyze it during the educational experience. These LOs are not intended to be prescriptive of activities or exercises; rather, they are a guide for both the educator and the student for measuring depth of knowledge and understanding.

Rather than include that text in each learning objective, please mentally append the following phrase to each objective: **"Upon successful completion of the Agile Leadership program, the learner will be able to..."**

Examples used in the learning objectives:

Several learning objectives include a list of examples. The examples are used to clarify the intent of the objective. Individual trainers can use the provided examples, their own examples that still meet the objective, or a mix of both. The inclusion of examples does not imply that they are the only options, or that they're an exhaustive list.



The learning objectives must be shared with every attendee of a CAL I course and are available on the Scrum Alliance website.

Certified Agile Leadership (CAL) I Learning Objectives

1. The Context for Agile

- 1.1. Describe at least three **economic or market factors** that have led to the rise of Agile approaches. For example:
 - *Technological advances*
 - *Internet, mobile, and social media connectivity*
 - *Globalization of the workforce and economy*
 - *Etc.*
- 1.2. Illustrate how the **complexity** and **uncertainty** of work relates to the fitness of an Agile approach.
- 1.3. Identify at least two **management trends** and their historical fit with the business environments of their time. For example:
 - *Taylor's Scientific Management*
 - *Total Quality Management (TQM)*
 - *Lean Manufacturing and the Toyota Production System*
 - *Etc.*
- 1.4. Explain the long-term effects of an organizational focus on **delighting the customer**, and how that relates to improved outcomes.
- 1.5. Explain at least three factors that increase the level of **employee engagement**, and how that relates to better outcomes. For example:
 - *Clear purpose*
 - *Autonomy*
 - *Opportunity to develop mastery*
 - *Strong social connection*
 - *Daily small wins*
 - *Etc.*
- 1.6. Describe at least two **benefits of becoming a more effective Agile leader**. For example:
 - *Increased ability to make good decisions in a complex environment*
 - *Ability to deliver on personal and organizational purpose with less expended energy*
 - *Etc.*

2. Agile Overview

Note: Learners can opt out of this section if they hold a Scrum Alliance CSM or CSPO certification that covers the learning objectives in this category.

- 2.1. Evaluate the **values and principles of the Agile Manifesto** for how they relate to an organization's ability to thrive in complex and rapidly changing conditions.
- 2.2. Describe at least three **characteristics of a high-performing team** and how these characteristics relate to Agile thinking. For example:
 - *Psychological safety*
 - *Trust*
 - *Clear team membership*
 - *Small*
 - *High-communication bandwidth*
 - *Aligned around a clear purpose/mission*
 - *Etc.*
- 2.3. Compare and contrast the practices and benefits of at least two **common Agile frameworks**. For example:
 - *Scrum*
 - *eXtreme Programming*
 - *Kanban*
 - *Lean Startup*
 - *Etc.*
- 2.4. Describe the **benefits of an Agile approach** from the perspective of at least three **stakeholder groups** with differing needs. For example:
 - *Board of Directors*
 - *Shareholders*
 - *Employees*
 - *Customers*
 - *Etc.*

3. Leadership in an Agile Context

- 3.1. Describe at least three key **mindset shifts** required to effectively lead in an **Agile context**. For example:
 - *From fixed mindset to growth mindset*
 - *From directing to coaching*
 - *From telling to collaborating*
 - *From preventing and hiding failure to learning through it*
 - *From viewing the organization as a machine to viewing it as a living system*
 - *From predict and control to inspect and adapt*
 - *From chess master to gardener*
 - *From expert to catalyst*

- *From reactive to creative*
 - *Etc.*
- 3.2. Explain at least one **leadership development framework** that is aligned with Agile thinking. For example:
- *Leadership Agility (Joiner)*
 - *The Leadership Circle (Anderson)*
 - *NeuroLeadership (Rock)*
 - *The Leadership Gift (Avery)*
 - *Etc.*
- 3.3. Apply at least one technique for **incorporating feedback** that improves your ability to inspect and adapt **your own leadership behavior** to increase effectiveness.
- 3.4. Practice at least one technique that enables a **leader to be present, aware, and engaged**, while avoiding over-influence and micromanagement. For example:
- *Gemba*
 - *Hawthorne effect — paying attention*
 - *Engaging in the Agile delivery and feedback cycle*
 - *Advice Process*
 - *Etc.*
- 3.5. Demonstrate a **coaching approach** that integrates alternative perspectives, engages others, and improves outcomes.

4. The Agile Organization

- 4.1. Identify at least three challenges an organization might face when undertaking an **Agile approach beyond a single team**. For example:
- *Building trust between teams*
 - *Optimizing the whole*
 - *N-factorial problem as communication scales*
 - *Large-group collaboration*
 - *Psychological safety*
 - *Etc.*
- 4.2. Apply at least three patterns for **increasing trust and collaboration** between multiple teams. For example:
- *Information radiators*
 - *Co-location*
 - *Radical transparency*
 - *Job rotations*
 - *Team liaisons*
 - *Etc.*
- 4.3. Describe at least two factors that influence the **culture of an organization** and how that relates to organizational agility. For example:

- *Power distance index*
 - *Organizational structures*
 - *Leadership beliefs and behaviors*
 - *Risk and change attitudes*
 - *Industry factors*
 - *Etc.*
- 4.4. Evaluate at least two ways to **structure an organization** in order to enhance agility. For example:
- *Value-based matrix (e.g., Spotify)*
 - *Communities of Practice*
 - *Holacracy*
 - *Sociocracy*
 - *Self-management*
 - *Etc.*
- 4.5. Describe at least three **governance policies** that enhance organizational agility. For example:
- *Compensation and incentives*
 - *Career advancement practices*
 - *Performance appraisals*
 - *Procurement and budgeting*
 - *Legal and regulatory*
 - *Etc.*
- 4.6. Deconstruct at least one **case study of an organization** that uses an Agile approach. For example:
- *Spotify*
 - *Morning Star*
 - *Valve*
 - *Buurtzorg*
 - *Zappos*
 - *Geonetric*
 - *Etc.*

5. Agile Approaches to Change

- 5.1. Describe an Agile organization as a **human system** where **change is always present** and dynamic leadership is required to catalyze that change for positive growth.
- 5.2. Evaluate at least three **organizational metrics** for their alignment with Agile thinking and how they impact behaviors and results. For example:
- *Outcome-based metrics, such as customer satisfaction, employee engagement, time to market, cost, etc.*

- *Output-based metrics such as productivity, velocity, features delivered, milestones met, etc.*
- 5.3. Deconstruct at least one **change management approach** and evaluate its alignment with organizational agility. For example:
- *Scrum*
 - *Lewin*
 - *Satir*
 - *Kotter*
 - *McKinsey 7S*
 - *Etc.*
- 5.4. Describe at least one Agile approach to identify and **reduce bottlenecks, impediments, and overall friction** in an organization. For example:
- *Systems thinking*
 - *Human systems dynamics*
 - *Lean A3*
 - *Organizational agility team using Scrum*
 - *Large-group retrospectives*
 - *Kaizen events*
 - *Etc.*
- 5.5. Reflect on at least one **case study of an Agile transformation** and critique how it approached **change in an Agile way**.

CAL II

The CAL II program is an advanced education, validated practice, and peer-based sharing program that consists of learning and practice across three categories.

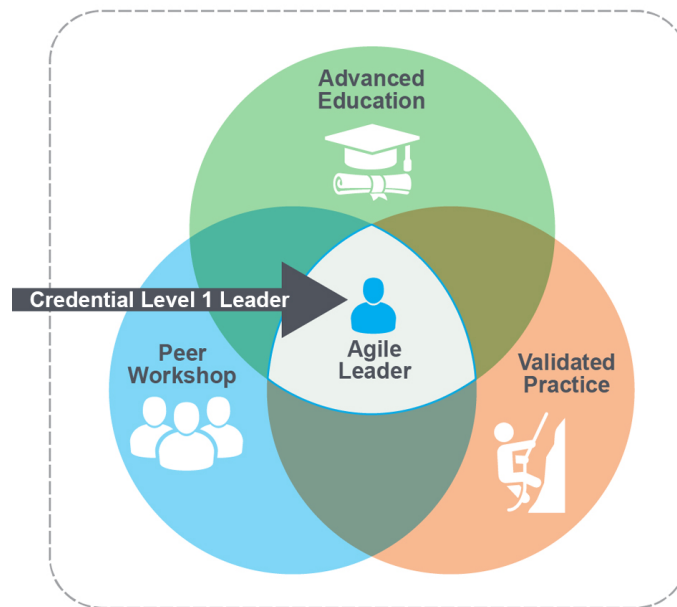
The goal of CAL II is to guide leaders in deepening, applying, and sharing their Agile leadership learning. CAL II requires a CAL I credential and successful completion of the advanced education, validated practice, and peer-based sharing requirements.

CAL II focuses on three categories defined in the CAL I program:

- Leadership in an Agile Context
- The Agile Organization
- Agile Approaches to Change

CAL II participants may submit education and practice activities to Scrum Alliance that occurred prior to program participation for possible validation.

Credential Level II



A pictorial overview of CAL II components required for each learning area.



CAL II Advanced Education

CAL II requires successful completion of one Scrum Alliance-approved education program per category:

- Leadership in an Agile Context
- The Agile Organization
- Agile Approaches to Change

CAL II Validated Practice

CAL II requires participants to document and share their experience and learning in a CAL II Experience Report. One report is required in each of the following CAL I learning categories:

- Leadership in an Agile Context
- The Agile Organization
- Agile Approaches to Change

CAL II further requires external validation of the documented practice and learning, given in one of the following three ways:

- **Approved Educator Engagement** – The approved CAL educator has been engaged with the participant and is able to validate the practice and learning alignment with the program.
- **Online Submission and Review** – The participant may submit their documented practice and learning to the Scrum Alliance website for validation.
- **CAL II Peer Workshop** – The participant must share one of their three documented practices and learnings at a PAL Peer Workshop (see below).

CAL II Peer Workshop

CAL II requires participants to participate in a facilitated peer-based workshop with others in the program. Attendees will share at least one of their CAL II Advanced Practice reports with their cohorts and discuss, analyze, and share feedback for mutual learning. Each participant must present one of their three advanced practices in the workshop.

Workshops will be facilitated by a Scrum Alliance-approved Educator and may be run in person or via multiple remote sessions.



Volunteer Program Teams

2015 Program Design Team – October 2015 Draft

- Pete Behrens
- Steven Denning
- Angela Johnson
- Pollyanna Pixton
- Simon Roberts

2016 Program Design Team – March 2016 Draft

- Pete Behrens
- Peter Green
- Angela Johnson
- Additional assistance from Sanjiv Augustine, Scott Dunn, and Brian Rabon

Both teams supported by Erika Massie and Lisa Reeder on the Scrum Alliance Education Team.

2018 CAL Educator Review Team

- Angel Diaz-Maroto
- Andrea Tomasini
- Dave Sharrock
- Erika Massie