

Sierra Club Leadership Development Project

Pilot Project Report and Recommendations

R E P O R T

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"In democratic countries, knowledge of how to combine is the mother of all other forms of knowledge; on its progress depends that of all the others."

Alexis De Tocqueville

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Executive Summary

- We have completed the pilot phase of the Harvard/Sierra Club Leadership Development Project (LDP) undertaken to test the recommendations of the National Purpose/Local Action (NPLA) research initiative of 2003-2005.
- We conducted the project between May 2006 and May 2007 as a four-part series of weekend workshops for the leadership of four chapters (Loma Prieta, Rio Grande, Cascade, and Florida) and 20 affiliated local groups, involving 166 participants, and 22 volunteer and staff facilitators, and principal researchers, Ganz and Wageman.
- Unlike traditional training which volunteers, staff, and leadership had viewed as “delivery” of information to individual participants, the LDP was an investment in building organizational capacity.
- We introduced a unique approach to leadership development by structuring interdependent leadership teams, building the relationships necessary to sustain those teams, grounding team motivation in shared narratives; equipping teams to devise creative strategy; and engaging volunteers in accountable, motivated, and effective action. Participants learned as members of leadership teams responsible for the accomplishment of specific goals and under conditions insuring ongoing learning, growth, and development.
- During the project we adapted our curriculum to respond to seven key challenges: a misunderstanding of leadership as heroic, individual, task based activism rather than collaborative, interdependent and relational work with others; a failure to recognize relationships as sources of power; little appreciation of personal and organizational moral resources; little interdependence in group work; absence of effective deliberation procedures; offering tasks to volunteers either trivially small or overwhelmingly large; and reluctance to hold one another accountable.
- Project outcomes include equipping participants with structures, skills, and practices to enable effective leadership; forming a training community within the Sierra Club that has already begun to refine and share LDP practices to the larger organization; developing a complete set of curriculum development and training materials.
- Taking advantage of this opportunity for dramatically improved effectiveness can only reach critical scale if introduced as a campaign, with time specific strategic goals, allocation of the resources to achieve those goals, and commitment to an end date by which the initial rollout will be completed. National leadership must commit to using it in service of specific organization-wide strategic challenges such as the climate change initiative; educating chapter and group leadership to what has been achieved, why it is needed, and how they can participate; and shunning the temptation of trying to impart LDP lessons in fragments, rather than as part of a coherent set of structure, skills, and practices.

The LDP pilot phase, along with the current Harvard / Sierra Club joint initiative, ends with this Final Report. The promise of this project can only be realized if the National Board acts quickly to build on the momentum created by this major investment of time, energy, imagination, and money over the past five years.

Project Origin and Purpose: Why the Sierra Club, Why Volunteer Leadership Development, and Why Now?

Growing public recognition of the urgent need for an effective response to the threat of climate change—and the promise of a new Federal Administration —confronts the environmental movement with its greatest challenge. The Sierra Club, because of its membership of 750,000, its history of activism, and its local, state and national volunteer structure, is uniquely situated to respond to this challenge. It has the capacity to mobilize coordinated local, state and national activity on a scale most other environmental groups can only aspire to emulate.

The reality is that while Sierra Club volunteer leaders are well-educated, highly principled individuals who possess a widely diverse array of capabilities, their work is poorly structured, they are poorly trained, they are offered little support, and no more than 2% of Sierra Club members engage actively in organization programs. Thus much of the Sierra Club’s influence at the local, state, and national levels that depends on the effective mobilization of volunteer resources remains to be realized.

Five years ago, at the initiative of National Board members concerned with an apparent lack of local engagement, the Sierra Club and Harvard University collaborated to carry out a comprehensive study of the sources of state and local group effectiveness: the National Purpose, Local Action Project (NPLA). A key finding of that study, presented at the Sierra Club Summit in 2005, was that investing in the development of state and local volunteer leadership capacity, if done properly, could improve the strategic effectiveness of the organization as a whole. This is so because the Sierra Club’s federated structure, governance by elected leaders, and reliance on volunteer participation to carry out its programs make effective state and local leadership a critical determinant of organizational performance.

Leadership is the work of creating conditions that enable constituents to achieve shared purpose in the face of uncertainty. Skillful leadership requires practical mastery of the arts of relationship building, motivation, strategy, and action. We undertook the Sierra Club Leadership Development Project (LDP) to learn how to teach these arts, and, at the same time, launch a sustainable interdependent community of leaders and learners—a new capacity for the Club.¹

¹ Throughout this report, the term “we” signifies the LDP development and training team, whose membership evolved as the program progressed. At the outset, the Harvard-based researchers (Marshall Ganz and Ruth Wageman) worked with the Sierra Club leadership development advisory committee to outline the overall program objectives and design. (SC design committee participants included Greg Casini, VP Administration; Julia Reitan, OVAS Director; Emily McFarland, Training Coordinator; and Frank Orem and Joan Willey, Training Committee Members.) Later, the group expanded to include project coordinator Sarah Staley, training coordinator Liz Pallatto, and a contingent of SC trainers (listed in *Appendix K*) who were carefully recruited, screened, and trained to lead participants toward the LDP learning objectives. By the end of the pilot program, the internal training community also included 74 participants (listed in *Appendix L*) who were prepared to impart its lessons and build a leadership community throughout the organization. As one intended result, the principal researchers, Ganz and Wageman, gradually turned over stewardship of the program to the SC internal training community.

The Leadership Development Project (LDP) was launched in the spring of 2006 as a pilot project to learn how to introduce structures, skills, and practices that could enable state and local leaders to exercise their leadership more effectively.

- The LDP introduced a unique approach to leadership development by structuring interdependent leadership teams, building the relationships necessary to sustain those teams, grounding team motivation in shared narratives, equipping teams to devise creative strategy, and engaging volunteers in accountable, motivated, and effective action.
- The LDP developed the training capacity within the organization to expand the program by preparing key participants to become future trainers, bringing them into a newly formed LDP training community.
- And the LDP created a foundation for an ongoing process of learning, adaptation, and development of the capacity to effect meaningful change as challenges and opportunities arise for the Sierra Club.

The LDP thus taught Sierra Club participants how to create a new organizational capacity to mobilize constituents and effect real change in the world. This report covers the origin, purpose, design, rollout, outcomes, and implications of that project.

It is now up to the National Board to determine how quickly it can build on what the organization has learned at considerable investment of time, energy, imagination and money over the past five years. As with any new initiative, the LDP will need staff and volunteer champions to help it continue to flourish. The initial results presented in this document highlight the merit of the approach, and those results can serve to attract both commitment and energy throughout the organization. When chapter and local groups understand how the program will help them think about, organize, and achieve their work on such issues as climate change, we believe they will actively seek the transformative power of partaking in the full and evolving array of LDP activities. It will take no less—and no doubt much, much more—to meet pressing challenges such as climate change, but this is one place the Sierra Club is uniquely well situated to begin.

As principal researchers, Marshall Ganz and Ruth Wageman also undertook this project in recognition of a broader challenge to the historically critical role of civic associations in US public life. Organizations like the Sierra Club have long served as “great free schools of democracy” in which participants learn to work together to help shape and influence the civic issues of their time.² These institutions are different from for-profit or non-profit organizations with hired employees, appointed executives, and goals limited to the delivery of goods or services to external customers or clients who enjoy no authority to choose leaders or to decide policy.³ In contrast, civic associations offer participants the capacity to assert a shared voice in public affairs. Despite their importance to our form of government and their distinctive organizational characteristics, however, little research

² Tocqueville, 1969 (1835-1840).

³ Wilson, 1973; Knoke and Prensky, 1984; Smith, 2000.

focuses on civic associations, and much less on how to improve their performance. This research is also intended to address that deficit in understanding among both academics and practitioners.

NPLA Findings

Among the many findings of the NPLA research, we focused on the following:

- The number of core committed activists (5 hours+/week) is a critical predictor of the extent of member engagement and the breadth and depth of program activity achieved by local groups.⁴
- Outreach to new members—and organization building activity such as training and retreats— is key to the development of more core activists. But only 74 local groups (20%) held new member meetings at all and only 48 groups (15%) score 3 or better on a 5 point scale measuring organization building.⁵
- Sound deliberation and implementation practices encourage development of leadership skills, but on a 5 point scale only 15 groups (5%) scored a 4 or 5, indicating the opportunity for dramatic improvement.⁶
- ExCom interdependence is a key predictor of leadership skill acquisition, member engagement, and public influence, but it was rarely practiced.⁷
- ExCom members acquire leadership skills—or don’t—mainly through “on the job training,” especially interaction with other ExCom members. Interaction with staff, however, although rare, can have a significant impact on learning. The way to improve leadership skills is thus by changing leadership practices.
- Values matter. The strength of one’s “world changing” and “self-fulfillment” values influence acquisition of leadership skills of managing self, others, and tasks. The value of self-fulfillment is least widely shared by ExCom members, however, and the skill of managing others is the least developed.⁸

Our Approach

We began with four core premises for building leadership capacity in the Sierra Club:

- Leadership means creating conditions under which constituents can work effectively toward shared goals in an uncertain and changing environment.

⁴ Andrews, Ganz, Baggetta, Han and Lim, 2007.

⁵ Ganz, Andrews, Baggetta, Han and Lim, 2005.

⁶ Ganz, Andrews, Baggetta, Han and Lim, 2005.

⁷ Andrews, Ganz, Baggetta, Han and Lim, 2007.

⁸ Ganz, Andrews Baggetta, Han and Lim, 2005.

- Leadership teams can build power more effectively than individual leaders acting alone, and teams can achieve better group and individual outcomes.
- Leadership practices can be learned and diffused throughout an organization, and thereby become a source of growing organizational capacity.⁹
- Leadership of volunteer associations requires specific skills, including:
 - Building relationships to motivate participation, discern common interests, and mobilize information
 - Motivating commitment, risk taking, and imagination by cultivating the experience of shared values, articulated as public narrative
 - Devising creative strategy by engaging members in clear and inclusive deliberative and decision making processes
 - Channeling collective resources into action based on clear commitments, accountability, and measurable outcomes

⁹Ganz, 2000; Ganz 2001; Ganz, 2003; Ganz 2001; Ganz, Andrews, et al, 2004, Ganz, Andrews, et al 2005, Ganz, Andrews, et al, 2007, Also: Hackman and Wageman, 2005; 2007; Wageman, 1995; Wageman and Gordon, 2004; Wageman, Nunes, Burruss and Hackman, 2008.

Project Design and Implementation

We designed and conducted a four-part series of weekend workshops for elected leaders of four chapters (Loma Prieta, Rio Grande, Cascade, and Florida) and 20 affiliated local groups, reaching more than 160 staff and volunteer participants in the 2006-2007 pilot round. [*Appendix A* summarizes the topics covered in each workshop; *Appendix B* lists the workshop dates for each participating chapter.] Each workshop was lead by a training team composed of facilitators drawn from Sierra Club staff and volunteers, along with the principal researchers, Ganz and Wageman.

Recruiting and Assessing Trainers

We initiated a rigorous recruitment process to select an effective team of trainers—a “coalition of the willing and talented.” The San Francisco-based national training staff worked with members of the Sierra Club national training committee to identify potential candidates. Candidates then submitted written applications. The national training staff, in consultation with Ganz and Wageman, interviewed the prospective trainers and selected an initial core group based on teaching experience, peer recommendations, interest in coaching, and availability to participate in the whole program.

The trainer preparation began with a three-day workshop for 18 potential trainers. Trainers were introduced to the overall curriculum, experiencing it as participants. The lead trainers (Ganz and Wageman) modeled desirable trainer activities and behavior and evaluated each candidate’s readiness to undertake the training responsibilities. The resulting core group also fine-tuned the launch workshop activities, in collaboration with the SC national training committee.

To ensure the highest quality experience for chapter and group participants, we selected the most qualified candidates to join the training team, based on the following criteria:

- Openness to learning
- Experience in teaching
- Readiness to commit to the entire program
- Flexibility and adaptiveness
- Emotional stability, self-awareness, and ability to coach others

Trainers were required to commit to the full program, including curriculum development work between workshops and pre-training as a training team before each workshop series. A training team was dedicated to each chapter, composed of a lead trainer and specific facilitators who worked with each participating group through the life of the project. Trainers established relationships and continuity with team members by facilitating their work in each workshop, offering ongoing coaching between workshops, and preparing them for each upcoming workshop.

One of the first tasks the trainers undertook was to identify and recruit other qualified trainers. This expanded group of volunteer, staff, and external trainers met for two to three days before each workshop to prepare and practice all the modules and activities on that workshop's agenda. This group also held debriefing sessions at the close of every workshop to further evaluate and refine the workshop content and delivery, and to identify core issues for Sierra Club to include in future workshops. In addition, each dedicated training team worked with its assigned chapter to debrief their work at every major break point in a workshop in order to refine and enhance the trainers' ongoing practices. These continuous assessments were an intentional part of the philosophy of leadership built into the LDP (see "Designing the Curriculum," below).

In the initial workshops (i.e., Workshop One for all four participating chapters), the principal researchers (Ganz and Wageman) led the participants' activities. They did so to model the learning approach for the Sierra Club trainers. Sierra Club training teams gradually took charge of teaching modules independently of Ganz and Wageman, so that by the fourth set of workshops, Sierra Club trainers led every participant activity, with Ganz and Wageman providing ongoing coaching and feedback to the trainers.

For every workshop, trainers and participants took on specific roles and responsibilities necessary for the smooth functioning of the program. These included lead trainers assigned to each chapter group (whose core responsibility was the effective functioning of the training team), facilitators assigned to ExComs within the workshops (whose core responsibility was the effective learning of the ExComs and the individuals within them), "Masters of Ceremony" to introduce each session, timekeepers to keep on track of the planned agenda, and "housekeepers" to ensure participants and trainers had all the materials needed throughout the workshop. The training teams created detailed checklists to guide the people who took on each role.

Choosing the Chapters

In order to discern potential participants' readiness to commit to the program, we designed an application process for chapters and local groups similar to the one used for trainers. The chapter and group ExComs submitted written applications, took part in interviews, and were asked to make a series of formal commitments to the program.

Because our goal was to develop team-level as well as individual leadership capabilities, we recruited Sierra Club ExComs to participate in the project as intact teams (usually six to ten members). To leverage the SC time investment and have multiple units to work with at the same time, we chose chapter ExComs that were able to recruit at least three other entities, usually local group ExComs, to join them in undertaking the full program.

We used the following criteria to select participant groups for the pilot program:

- Motivation and openness to learning
- Readiness to commit the ExComs to the entire program

- Ability to recruit local group ExComs (at least five)

We also sought regional diversity so that our results could not be construed as region specific, and so that initial participants would be well situated to share their experience with other nearby groups throughout the geographic breadth of Sierra Club.

Designing the Curriculum

Based on the NPLA study, the input from the Sierra Club training team, and the professional expertise of Ganz and Wageman, the LDP trainer team designed an extensive series of activities, assignments, and training materials to realize LDP goals. The curriculum was organized around the leadership development framework, which entails cultivating individual and collective skills in four essential practices:

- Relationship building based on shared values and interests
- Motivating self and others through public narrative
- Strategic decision-making based on the effective use of group deliberation skills
- Individual and collective action based on commitment, accountability, and outcomes

Research indicates that different kinds of learning require different modes of instruction.¹⁰ Thus we constructed specific learning activities to address the full range of thinking, feeling, and acting capabilities we wanted participants to learn.

We used a variety of teaching methods, including conceptual discussion, individual and group exercises, videos and other visual aids, case discussions, coaching, member outreach, and even the occasional interpretive dance. Through this blend of teaching methods, the curriculum incorporated several important guiding principles for leadership development derived from a rich tradition of research on adult development and leadership:¹¹

- Collective participation
- Goal directed learning
- Cumulative learning
- Reflective practice
- Active learning
- Transfer of capabilities
- Evaluation and research

Collective Participation. Individuals participated in workshops as members of “leadership teams” so that both individual and team leadership skills could be developed and institutionalized. Previous research shows that individuals are best able to use newly

¹⁰ Bridges and Hallinger, 1997; Cacioppe, 1998

¹¹ Argyris, 1980; Brown & Pozner, 2001; Raelin, 1997.

acquired skills if they learn them in the social context in which they use them—that is, in the teams in which they work.¹² Moreover, many of the core leadership capabilities exercised in Sierra Club, such as joint decision-making, are inherently collaborative skills and must be learned by intact teams.¹³

Goal Directed Learning. At the conclusion of every workshop, the leadership teams set individual and group goals that required them to introduce their new skills into daily practice. For example, some individuals chose to practice telling their stories X times before the next workshop; and some teams set goals to engage X new volunteers in a meaningful conservation task with the team. At the beginning of each subsequent workshop, individuals and teams reported on their degree of success in implementing their newly acquired leadership skills and critically assessed their accomplishments in relation to those goals.

Cumulative Learning. We designed the overall learning experience to enable individuals and teams to accumulate and deepen vital leadership expertise as they developed increasingly sophisticated practical skills over time.

Each training component was grounded in the leadership development framework, which was introduced in Workshop One to provide conceptual scaffolding for the entire program. Participants explored each of its sequential components and then expanded on them at subsequent workshops. We then brought all the components back together and integrated them in the final workshops.

While the basic content blocks of all four workshops were mapped out at the outset, Ganz and Wageman in collaboration with LDP trainers invented new modules to address needs that emerged in the course of the workshops (see “Project Outcomes,” below). An iterative feedback loop is a hallmark of the continuous learning approach. It is most evident in LDP in three places:

- **Design of workshop content.** During each workshop, the training team met to debrief each module and harvest lessons about the challenges faced by participants and trainers in their work in LDP and in the Sierra Club more broadly. The lessons captured from these debrief sessions became key input into the training team’s design of subsequent workshops (both content and process).
- **Delivery and organization of workshops.** The core training team devised together a syllabus for each subsequent workshop, but each iteration of the workshop was deliberately and thoughtfully revised based on lessons learned from the conduct of the previous one.
- **Formation and development of the training teams.** Through the course of working with participants, the core team discovered the importance of developing the training teams working with each chapter into interdependent leadership teams

¹² Argyris, 1999.

¹³ Edmondson, Bohmer, and Pisano, 2001; Kozlowski, Gully, Salas and Cannon-Bowers, 1996.

themselves. The teams working with each chapter evolved over time from a loose unit of individuals working with particular participant teams into tightly-interdependent training teams leading the learning experiences of the chapters to which they were dedicated.

Reflective Practice. The principle of reflective practice helps participants *learn how to learn* based on real time critical analysis of their own experience. For example, people learn the practice of leadership—like any practice—by doing it. We learn to ride a bike only by risking falling, actually falling, and then getting up on the bike again—and again and again—until we learn to keep our balance. The courage to keep getting back on the bike enables us to learn. Reflecting on what worked—and what didn't—enables our practice to become increasingly sophisticated.

Likewise, learning to lead—and to develop leaders—requires risking failure. Reflective practice creates the opportunity to turn failure into opportunities for learning. Because this can be emotionally challenging, we asked participants to establish a norm of courage and mutual support in experimenting with new behaviors.

Each workshop session began with leadership concepts that were then modeled in structured group activities that called upon groups and individuals to practice new behavior. Participants expanded their practical skills through group debrief sessions in which they evaluated their performance, drew out the implications for learning, and concluded by setting individual and group goals for application of the lessons learned in their local Sierra Club work after the workshop.

We began to institutionalize reflective practice by requiring individuals and groups to keep track of and report on their progress toward their goals at the following workshop. Each group's designated facilitator coached participants in fulfilling those goals between workshops. An online journaling site designed exclusively for LDP participants offered them the opportunity to reflect on their experiences, and to receive feedback from their coaches. At the beginning of each subsequent workshop, participants reflected upon their individual and group reports, and shared the lessons as a group. The workshops then proceeded with a new set of general concepts, the next round of active group exercises, debriefs, personal evaluation, and goal-setting.

Active Learning. Trainers and participants spent more than 50% of every workshop in practical teamwork activities. We designed exercises that turned leadership concepts into specific practices that could address challenges relevant to the work of Sierra Club ExComs and volunteers. This type of exercise, when resonant with participants' experiences, reinforces their motivation to learn.¹⁴ By practicing new activities and behaviors, participants develop new skills while learning to envision and create better outcomes.

The teamwork exercises and debriefs provided a structure in which participants could surface, examine, and learn from the ongoing challenges, tensions, and anxieties that are

¹⁴Kolb and Fry, 1975; Smith, 2001; Wenger, 2003.

part of any important group endeavor. This approach required trainers who could help a leadership team learn to manage the anxiety that accompanies conflict or uncertainty. As trainers learn to “hold” rather than suppress this tension, they are better situated to guide team members toward creative resolutions.

Transfer of Capabilities. In addition to cultivating participants’ ability to spread the LDP learning throughout the organization, the LDP created an extensive array of teaching and learning supports for continued Sierra Club use.

We developed a comprehensive set of materials for each workshop, including:

- A participant guide that included learning objectives, reading materials, and process guides
- A module-by-module agenda describing the purpose and structure of each activity
- Detailed worksheets, readings, video and other supports, and evaluation instruments needed for each session

For the training team, we assembled:

- Facilitators’ guides for each activity session, including questions to pose, guides for capturing group output on flipcharts, and other coaching for the facilitators’ development
- Overview and detailed teaching instructions for each workshop, including the high-level conceptual content
- Background reading for trainers to support deeper learning and preparation as they took on more and more responsibility for teaching
- Teaching guides for each individual module in the same detail

Evaluation and Research. In the course of each workshop, we collected data to assist us in real time evaluation of team and individual learning, as well as for longer-term evaluation of the LDP process and its outcomes for Sierra Club, and for the purpose of academic research. We summarize below the main data collection processes.

Individual survey assessments. Every participant completed an individual survey at the beginning of the first workshop. This instrument was designed to capture sources of individual motivation for participation in the LDP and in the Sierra Club; self-evaluations of leadership skills; and descriptive characteristics, including basic demographics and experience with Sierra Club.

In addition, this first survey asked individuals to assess the leadership skills of their peers in the team. We included items assessing relational, motivational, deliberative, and action skills, among others. Respondents provided assessments of the degree to which each member of the team engaged in certain behaviors, on a scale ranging from 1 = never to 5 = always. Sample peer evaluation items are shown in *Appendix C*.

We used peer evaluations of individual leadership skills for two main purposes. First, a subset of participants was given feedback, graphically represented, about the quality of their deliberative behavior as experienced by peer team members. This feedback was part of testing different strategies for learning effective deliberation practices.

Second, these assessments were used as one baseline measure of the state of individual skills before LDP. Follow-up assessments of the same skills were captured in Workshops Three (relational and motivation skills, which were practiced in depth in Workshop Two) and Four (deliberation and action skills, which were practiced in depth in Workshop Three) respectively. Changes in peer evaluations of these leadership behaviors are one measure of the degree of leadership skill learning that takes place in LDP.

Team survey assessments. Before the first workshop, members of each participating ExCom completed the Team Diagnostic Survey (TDS).¹⁵ The TDS instrument captures, through a series of descriptive items, a team's design features, the quality of its work processes, and the quality of individual relationships and satisfaction with the team. [*Appendix D* offers a sample of TDS questions and assessments.]

We provided to every team, in Workshop Three, feedback about the quality of design and processes in their ExCom, and helped them identify and act on that feedback. Longer-term reassessments of the state of the leadership teams by reissuing the TDS post-LDP are in progress.

Trainer evaluations. Every trainer provided structured assessments, at the end of every workshop, of the individual participants they coached during the course of the workshop. Trainer evaluations were designed to capture both overall participation and progress of the individuals, and the current state of skill displayed by those individuals on the focal leadership skills of the workshop. Sample trainer evaluation questions are provided in *Appendix E*.

Workshop assessments. Participants were asked to provide feedback (both in the form of quality ratings and in the form of commentary) on each module of each workshop. These data were compiled to compare the relative quality and impact of the range of leadership skills practiced in the workshops. Sample workshop assessment questions are provided in *Appendix F*.

Videotaping. Every workshop was videotaped. We captured all sessions for each participating chapter in the large classroom, as well as several participating teams as they worked through the workshop exercises. We used videotapes to provide qualitative assessments of the nature and degree of learning in the teams, and to provide source material for trainers to practice teaching and facilitating the modules of the workshop. Videotaping was an essential part of transferring the

¹⁵ Wageman, Hackman, and Lehman, 2004.

teaching and facilitating capacity to Sierra Club members through the course of the workshops. A complete archive of all video materials from the LDP is available from the Sierra Club Training Committee.

Individual and team goals and accomplishments. Every workshop ended with a goal-setting session in which teams and individual participants were asked to set goals to be accomplished before the next workshop, applying the material of the workshop to their work as leaders in Sierra Club. At the beginning of each workshop, we captured team and individual reports of which goals were and were not accomplished. See *Appendix G* and *Appendix H*, respectively, for examples of individual and group goals accomplished.

Conducting the Four Workshops

We introduced the leadership development framework and practiced all four of its components at the launch workshop (Workshop One) held with each participating chapter. Workshop Two concentrated on the first two components: relational and motivational capabilities. Workshop Three focused on the other two components: devising strategy and organizing for effective action. The final workshop pulled together all four components combined with individual and group lessons from the entire LDP experience. [See *Appendix A*.]

Workshop One: Launch and Overview. During the launch workshop we introduced the overall leadership framework for the subsequent three workshops, and conducted participants through the experience of how each element interacts with the others to accomplish collective purpose. Members of each team learned and practiced:

- Holding one on one meetings to build relationships with each other and identify shared interests and resources (developing relational leadership skills)
- Motivating one another to commit to acting on those interests based on shared values, articulated as their story (developing motivational leadership skills)
- Devising strategy to turn their resources into the power they need to act on those interests (developing skills of strategic deliberation)
- Taking accountable, effective, and measurable action (developing implementation skills)
- Embedding these new skills in their activities outside the workshops (preparing to coach others in local leadership development programs)

Beginning Friday evening, each team worked its way through this cycle of activities, culminating in an action assignment in which they reached out to obtain specific commitments from their members, constituents, and supporters on Sunday morning. We debriefed participants' experience of the workshop, reflecting on what they had learned and what they still needed to practice, which the participants then turned into personal and group goals.

Workshop Two: Relationships and Motivation. The second workshop expanded upon the first two components of the leadership framework: *relationships* and *motivation*. This workshop began with a review of participants' progress toward the goals from Workshop One. We helped participants learn to celebrate their accomplishments and discuss how to address ongoing issues. We then focused on how to expand on one on one relationships by building intentional networks, how to sustain those relationships by turning conflict to constructive purpose, how to enhance group motivation by telling the story of the Sierra Club as a whole, and how to design action that can both sustain motivation and develop leadership.

Participants practiced the following:

- Reflecting on their accomplishments to draw lessons for the future
- Building personal and community relational networks
- Finding common purposes across groups
- Making internal conflict constructive through creative problem solving
- Telling a public story of self as a Sierra Club leader to motivate others
- Designing volunteer activity that motivates continued participation and that builds leadership capabilities in new volunteers
- Strengthening personal and group reflective practice skills

Workshop Three: Structure, Strategy, and Action. In the third workshop, we concentrated on the latter two components of the leadership development framework: *strategy* and *action*. After debriefing participants' goal-related work from the previous workshop, we focused on how to structure leadership teams to be effective in planning strategy and implementing action. Participant teams practiced how to establish good deliberation processes in order to devise creative strategy and bring a culture of commitment, accountability, and consistency to action.

We designed this workshop to support the following individual and group learning objectives:

- Reflecting on participants' accomplishments to draw lessons for the future
- Structuring a group as an effective leadership team
- Conducting creative strategic deliberation
- Making and keeping commitments—taking effective action
- Strengthening individual and group reflective practice skills

Workshop Four: Structure, Skills, and Practices. In our final workshop, participants synthesized their learning from the previous three, connecting all of the structures, skills, and practices introduced during the course of LDP. The groups revisited team purpose to solidify a shared understanding of what each team was working collectively to achieve into the future and beyond LDP. Each team then selected individual members who were trained to serve as team coaches in team structure, relationship building, storytelling,

strategizing, and task design. This prepared them to become specialized—yet interdependent—resources for their teams, building the teams’ capacity to learn, practice, and use those skills in the future.

We also coached participants in how to institutionalize regular team practices, such as high-quality meetings, that are basic to their collaborative work. Each team therefore completed the weekend with a better understanding of who they are as a team and what they exist to accomplish, along with a rich array of leadership skills and resources that all team members could draw upon, knowledge of when and how to draw upon them as a team, and built-in institutional practices and rituals that will foster ongoing team enactment of LDP concepts.

We concluded the workshop with a group reflection on how to bring the work of the LDP into the larger Sierra Club, and each participant’s role as a practitioner and teacher in that enterprise. As a result, LDP participants and trainers are prepared to reach out to others, teach others, and spread leadership development throughout the organization with appropriate institutional support.

We outlined the following learning objectives for individuals and groups in this final workshop:

- Reflecting on individual and group accomplishments to draw lessons for the future
- Articulating the team’s purpose; explaining who you are, what you do and why, to someone you want to recruit to your team
- Defining a productive meeting agenda to identify and achieve the most important work the team does together
- Adopting ground rules for running a positive meeting (accountability, commitment, honoring each other’s time and contributions)
- Equipping each member of the team with special expertise in one core leadership skill (one on ones, storytelling, strategy, team design, and task design); and the ability to coach other team members in that skill
- Celebrating and reflecting on the work the group has done together in LDP, and planning for continuing this work and bringing it into the larger Sierra Club community

Building the Training Community

The training community evolved over the course of a year from a collection of talented individual facilitators into four interdependent training teams dedicated to the development of each chapter. In addition, the lead trainers, principal researchers, and members of the training community and Sierra Club staff served as interdependent leadership teams for the whole project in several different configurations at different times.

This interlocking team structure was an emergent property of LDP, developed as project members learned what kinds of leadership the design and implementation of the project needed, both overall and within each chapter. Every chapter training team themselves participated in a self-diagnosis using the Team Diagnostic Survey, conducted their own development sessions to establish shared purpose, norms, and work processes as training leadership teams, and set their own goals for their work as leaders within LDP. The work of the trainers to become interdependent leadership teams and thereby to lead LDP more effectively therefore served to model the curriculum to the participants.

Developing and conducting the workshops has generated an unprecedented level of new skills and teaching capacity that LDP participants and trainers can use to expand leadership capability throughout the organization.

These new leadership development resources include:

- A core group of committed leadership trainers who can disseminate the LDP approach throughout the organization
- A completely fleshed-out method for creating the conditions in which future participants can learn leadership skills, and learn to train others
- A curriculum that includes the structure, tools, and processes necessary to support ongoing leadership development activities
- A comprehensive set of support materials
- A cadre of volunteer and staff participants proficient in each of the major leadership development skill sets: team design, one on ones, storytelling, strategizing, and task design.

Taken together and cumulatively over time, these elements of the Sierra Club leadership training community represent a significant—and expanding—opportunity for enhancing the organization’s ability to effect major change in the world.

Project Outcomes: What We Learned During LDP and How We Addressed It In Workshops

Consistent with the goal of continuous learning, the principal researchers and core training team met frequently to debrief lessons learned from work with the participants during LDP. This team met several times at Harvard University in the course of the project for the purpose of identifying the core leadership challenges facing participants, as gleaned from ongoing work with Sierra Club members during LDP workshops. Based on these sessions, the team collectively generated objectives for the next series of workshops. As a consequence, every serious leadership challenge we identified in the course of the project was deliberately addressed in the curriculum. In the process of assessing and addressing participants' emergent and ongoing leadership development needs, the core training team practiced and enhanced its own active learning capabilities.

We distill below seven challenging—and interrelated—emergent issues we considered most significant for leadership development within the Sierra Club community. Raising these issues should *not* be construed as an indictment of the Sierra Club or the LDP participants. Instead, these are areas where further reflection and continuous improvement can be most valuable in building new power for the Club.

For each issue, we provide illustrative observations and quantitative data that explain the significance of the issue for Sierra Club's effectiveness. We then describe what was built into the LDP curriculum to address each issue as it arose:

- Sierra Club members tended to see themselves as heroic, individual, and task-based activists rather than collaborative, interdependent and relational leaders who create conditions for others to accomplish shared purpose.
- Sierra Club groups failed to recognize relationships as resources for building power.
- Sierra Club groups made little use of the moral resources within themselves, in their teams, and in the organization as a whole.
- Sierra Club ExComs did not function as interdependent leadership teams.
- Sierra Club ExComs lacked the structure and processes to conduct effective deliberation.
- Sierra Club activists offered action tasks to volunteers that were either overwhelmingly large or trivially small.
- Sierra Club activists were reluctant to hold others accountable.

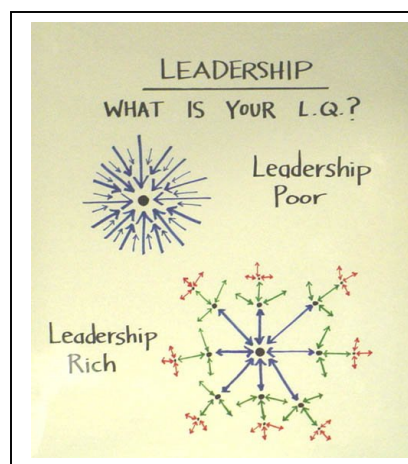
Sierra Club members tended to see themselves as heroic, individual, and task-based activists, rather than collaborative, interdependent relational leaders who create conditions for others to accomplish shared purpose.

“I’m the dot!” one participant exclaimed, in describing her leadership role in her group. Indeed, all activities converged on her: she was the “dot” in the center of the group, and all arrows pointed to her. While she liked having her hand in all of the group’s activities, she also found it exhausting and disheartening at times. Moreover, others didn’t step up to take on tasks, or follow through when she asked them to. She felt lonely, frustrated, and often powerless.”¹⁶

We learned early in the project that Sierra Club members did not see themselves as leaders as defined in the leadership development framework. Instead, they tended to see themselves as solitary activists individually responsible for achieving all the group’s goals. Some individuals perceived their roles within the Sierra Club as an opportunity to further their personal conservation interests rather than collaborate to achieve the shared purposes.

Activists and members alike failed to appreciate the potential power of collaborative local leadership within the national organization. This is not a critique of the individuals themselves, however, but a consequence of the lack of existing structure for collaboration and shared purpose in the Club.

Figure 1
Sphere vs. Dot: The Leadership Quotient



¹⁶ We introduce and illustrate the seven emergent issues with anecdotes that reflect an amalgam of experience and quotations from multiple LDP participants. These vignettes are not direct quotes from specific individuals, but rather examples intended to capture the essence of the SC leadership challenges we observed throughout the LDP.

There are many drawbacks to the “lone ranger” view of leadership: lack of group cohesiveness and commitment, a tendency to focus on individual *issues* rather than shared *purposes*, a higher risk of burnout, and a limited impact based on what a single dedicated individual can accomplish—all of which can lead to an attitude of solitary powerlessness.

Advancing an alternative model of relational leadership: creating conditions that mobilize others in collective effort. Using a Hoberman sphere and the stylized image in figure 1 above, we offered a model of relational vs. heroic leadership. The actual sphere is a three-dimensional object made of plastic mesh that can expand to create a ten-inch sphere or collapse into a two-inch solid ball. It served as an effective visual metaphor to help participants internalize this major cognitive shift in their perceptions of leadership.

In the heroic activist model the sphere of influence collapses upon itself. All the arrows of accountability point toward the single individual at the center—the dot. The relational model of leadership, on the other hand, creates two-sided arrows that connect all participants to each other and to their common goals. This view of leadership allows the group’s sphere of collective power and influence to expand like a Hoberman sphere.

By engaging in directed group activities, participants came to understand leadership as *creating the conditions that mobilize others in a collective effort*. We reiterated this definition throughout every workshop, and modeled it in our own work with the Sierra Club trainers. We deliberately built *their* capacity to collaborate, deliver, and accomplish—long after our departure.

A critical step toward adopting this new model was recognition of the fact that as individuals, participants were simply not able to accomplish everything that needed doing—a recognition of limits that enables them to ask for the help they need. Paradoxically (for those operating under the “lone ranger” model of leadership), this recognition can *increase* rather than decrease both one’s own power and the power of the team.

To reinforce the shift toward a more collaborative practice of leadership, we emphasized team training as well as individual training. We added training in identifying shared purpose, team priority setting, and integrative negotiation to the curriculum to help participants develop their practice of collaborative action.

Sierra Club chapters and groups failed to recognize relationships as resources for building power.

“I’ve been sitting next to him at ExCom meetings for the last year, but I never knew that he had all that experience in graphic design. or. . .that we grew up in the same town, although 20 years apart. It turns out he also went to school with that city council member that the political committee has been having such a tough time with.”

Because ExCom members view activism as a “solo” activity, the relational resources they can bring to bear on their work are hardly utilized. Because they make little effort to learn about each other, given the intense task and issue focus many bring to their work, they underutilize the resources available to other ExCom members, fail to appreciate interests they share, as well as those about which they differ, and rarely call upon broader social networks with which they are linked for their Sierra Club work.

Without a commitment to intentional relationship building—creating relational networks among leaders, between leaders and constituents, and with community members—organizational engagement centers on individual commitments to specific issues. This issue focus makes the discernment of common values and interests very difficult, thus limiting an ExCom’s capacity for teamwork. Together with deficiencies in individual and group motivation, individual issue focus diminishes the ExComs’ overall capacity for effective action.

Building Relational Resources. Participants learned and practiced several kinds of relationship building activities, including one on ones, intentional networking, and managing conflict to preserve relationships. (See *Appendices G* and *H* for examples of relationship-building activities participants set as individual and group goals to address between the workshops.)

Practicing One on One Meetings. We introduced the practice of one on one meetings to teach participants how to learn about each other’s values, interests, and resources. Widely practiced as a basic skill in community organizing, the “one on one,” although personal, is not private, and is a structured process with specific outcomes. At the end of an effective one on one, each participant should have learned about the other’s values, their interests in Sierra Club work, and resources they can bring to bear on that work. Based on this information they can discern interests they share, identify resources of value to each other, and make a commitment to work together on behalf of those interests.

The object of the one on one, however, is not to secure a specific resource—such as a petition signature or contribution of money—but, rather, to make a mutual commitment to working together on behalf of shared interests. It is thus intended to form a reciprocal relationship with another person, not simply to access their resources. Naming this activity “one on one” clearly differentiates it from “chit-chat” and defines it as a specific leadership skill.

Participants were surprised and moved to have the opportunity to learn about each other. Unaccustomed to talking about themselves, acknowledging their own resources, or probing each other, they valued being given “permission” in the form of a structured activity and dedicated time to learn how to conduct it effectively.

Building Social Networks. We built on the one on one meetings introduced in Workshop One, to focus on the value of the strategic development of social networks. After

introducing the concepts with a Harvard Business School case discussion, we provided participants with the opportunity to develop their own networks, beginning with other people in the room involved in Sierra Club activity outside their specific domain.

Sustaining Relationships by Managing Conflict. Because of the lack of relational context, disagreements great and small often become personalized and hurtful, and lead to ongoing enmity among people who have every interest in collaboration with one another. In Workshop Two, we conducted an interest-based bargaining exercise in which participants learned how to “have a good fight,” and how to sustain relationships in a conflict. They learned to engage (rather than avoid) the conflict in order to achieve positive outcomes.

Conflicts among Sierra Club members usually stem from differences in personal priorities about conservation issues. Practice in “integrative bargaining” shows participants how to place their underlying concerns on the table rather than focusing on the differences in their positions on a topic. As a consequence, they become able to invent new solutions that meet *both* sets of interests, and that engage them in a collaborative relationship with each other based on mutual support of each other’s interests.

This kind of conflict management is especially helpful for combining the motivational resources of individuals with passionate interests in particular issues, a characteristic typical of Sierra Club members.

Sierra Club chapters and groups made little use of the moral resources within themselves, in their ExComs and in the organization as a whole.

“My Dad used to take me hiking along a beautiful stream—a stream that later dried up! It makes me sad that I’ll never be able to take my own kids there. That’s why I joined the Sierra Club.” The speaker shared this story with some trepidation: he had never heard a fellow ExCom member share such a personal anecdote. Their meetings tended to focus on issues and political agendas instead. But when they finally experienced the values they share, he declared enthusiastically, “We’re all the same! We’re all the same!”

The Sierra Club and its members possess vast stores of unrecognized and underutilized moral resources. By “moral resources” we mean the values that inspire Sierra Club members, activists, and leaders to commit to this cause, devote long hours of work on its behalf, and motivate risk taking to advance their mission. This is a curious disconnect in an organization whose mission is above all a moral one, and whose members have strong convictions about the environment and a desire to act on them.

Along with the lack of relational information, many Sierra Club leaders know little of how to articulate their own sources of motivation, appreciate each other’s sources of

motivation, and thus, how to inspire participation, commitment and resilience in the face of reverses.

We also observed a surprising lack of awareness of the story of the Sierra Club—the choices of its founders, the challenges they faced, the values that guided important choices in the organization’s history, etc. This lack of access to the Sierra Club’s identity denies activists a critical resource for their own motivation, for inspiring others, and for identification with the Sierra Club as a whole. It also makes it far easier for individuals to appropriate the Sierra Club’s “brand” for their own purposes. Not limited to local groups and chapters by any means, this deficit results in a real loss of solidarity, motivation, and inspiration—and ultimately power at all levels of the organization.¹⁷

For example:

“I joined the Sierra Club many years ago, but I never knew how my chapter got started until tonight. I wish I’d known that— it would have helped me explain just why it’s so important. And I had never heard how the Sierra Club itself began. Last night, reading the history, I found myself very inspired by John Muir’s fight to preserve Hetch Hetchy. Even though he lost, it paid off later, when he was able to save Yosemite. If we just keep on fighting, we may lose a few before we win, but as long as we’re getting stronger, we’ll win a big one down the road.”

Increasing the awareness of Club and chapter history throughout the organization represents an important opportunity to help group and chapter leaders relate to the national organization, enhance their ability to engage others, and sustain their own commitment and motivation.

Drawing motivation from shared values articulated through storytelling. We introduced the practice of public narrative—or storytelling—as a way to articulate values motivating individuals, shared by the larger group, and at stake in current action. This experience of shared values facilitates collaboration as well as general motivation.

Storytelling is an art that can be learned through repeated practice, coaching, and group feedback. Participants learned to tell a public story in three steps:

- A story of *self*—why I have been called to this work
- A story of *us*—why we, those of us in the room, our organization, our movement, have been called to this work
- A story of *now*—the challenge which we are called to face now, the source of our hopes, and the choices of action we must make now

¹⁷ Barney, 1986; Schein, 1992.

To encourage participants to connect their own stories with that of the Sierra Club as a whole, we created a brief Sierra Club history, highlighting key choices that made the organization what it is. We wove storytelling activities throughout every workshop, created celebrations, and asked participants to establish their own rituals in the form of skits, chants, and shared activities. (For an example of a public narrative that incorporates a story of self, a story of us, and a story of now, see Lisa Renstrom’s story provided on the video CD that accompanies this report.)

Sierra Club ExComs were not functioning as interdependent leadership teams.

“We were talking about collaboration as a source of power. Marshall [Ganz] said that we’re leaking power if we’re not collaborating. Suddenly I understood why our group never seemed to accomplish much together. We sit around a table trying to agree on what to do, and everybody wants to talk about their own issues. She wants to save the feral cats, he wants to stop the cell phone tower in the hills, I want to protect the waterway... We can’t agree, so we end up saying, ‘You do your thing and I’ll do mine.’”

This story illustrates both the dissipation of power and the failure to build the capacity to act collaboratively. It underscores the need to cultivate interdependence as a source of power and creativity. Despite the importance of relationality, we emphasized that unstructured relationships and friendships are not substitutes for the performance of interdependent work.

Overcoming “you-do-your-thing syndrome” means learning to function as an interdependent leadership team—a skill set that was entirely lacking in many of our ExComs’ experiences. Instead, their primary emphasis was on the accomplishment of individual tasks or causes, each identified and adopted by a different individual. The result was that ExCom meetings became venues mainly for individual reports, with little focus on common purpose, creative strategizing, or collaborative performance of tasks. Group outcomes thus resulted more from the uncoordinated efforts of particular individuals than from the capacity of the team for strategic action.

In the absence of a way to structure collaborative work to achieve shared purposes, ExCom members’ reliance on “official” roles for their authority can actually hinder collaboration. Domination by individual voices of forceful, committed members can also result in blaming of these members for group dysfunction that actually stems from the absence of effective structure.

It became important, therefore, for participants to understand that the LDP is not simply about making their ExComs better, but about learning a whole new model of team leadership.

We introduced the concept of “real teams” developed by Hackman and Wageman through use of their Team Diagnostic Survey, an instrument that allows team members to evaluate team performance in terms of Real Team practices.¹⁸ The elements of a Real Team include:

- Boundedness—the degree to which members actually know who is and is not on the team
- Interdependence—the degree to which team members share accountability and work together toward a common purpose.
- Stability—the degree to which members stay together for some reasonable period of time

In Workshop One, each team assessed itself on these three dimensions, ranging from 1 = very poor to 5 = excellent. For comparison, table 1 provides assessments on the same dimensions of analytic teams in the public sector and of senior management teams in businesses and the public sector.

Table 1
SC Team Self Assessments vs. Public Sector and Senior Management Teams

| | Sierra Club ExComs (n=25) | Public Sector Analytic (n=26) | Senior Management (n=78) |
|----------------|--|--|---|
| Real Team | 3.75 | 4.10 | 4.11 |
| Bounded | 3.91 | 4.50 | 4.51 |
| Interdependent | 3.64 | 4.09 | 4.02 |
| Stable | 3.71 | 3.71 | 3.80 |

As can be seen in the table, Sierra Club teams score relatively poorly on the dimensions that make up a real team, even compared to senior leadership teams in the for-profit sector, which are notorious for being teams in name only.¹⁹ *Appendix I* shows the standing of Sierra Club ExComs on all the dimensions of team quality assessed by the Team Diagnostic Survey. The survey clearly showed that the Sierra Club teams had a major need for redesign as teams, which became a core focus of Workshop Three.

Some ExComs were in better shape, and as an illustration of the importance of high-quality team structure, we provide three findings from the LDP research in table 2, below. We divided the ExComs into teams that scored reasonably well on the elements of “Real Team” and those that scored relatively poorly, and termed them real teams and teams in name only.

¹⁸ Hackman, 2002; Wageman, 1995; Wageman and Gordon, 2004

¹⁹ All these differences are statistically significant at p<.01.

First, we show the degree of *team goal accomplishment* in the course of LDP for Sierra Club teams that were real teams vs. teams in name only (ranging from 0=missed goal to 4=overachieved). Second are the average *overall peer evaluations* of individuals in real teams vs. teams in name only at Workshop 4, indicating the quality of learning and development that occurred for individuals in good vs. poor teams (ranging from 1=little skill to 5=great skill). Third is the *average trainer evaluations* on leadership skills at Workshop Four of individuals in real teams vs. teams in name only.

Table 2
SC “Real Teams” vs. Teams in Name Only

| | Team Goals Accomplished Across Workshops | Peer Evaluations of Individual Leadership Skills at End of LDP | Trainer Evaluations of Individual Leadership Skills at End of LDP |
|--------------------|---|---|--|
| Real Teams | 2.32 | 3.20 | 4.22 |
| Teams in Name Only | 1.12 | 2.25 | 3.55 |

As can be seen from these data, the teams were able to accomplish more together *and* the individual team members grew, learned, and developed more *to the degree they were working in real teams*.

Developing the capacity to design interdependent leadership teams. As the need to teach interdependency became clearer, we introduced a more powerful model of interdependent leadership, based on mutual commitment to an underlying set of shared values and interests. We worked on uncovering these shared values as a way to build *shared* interests, thus moving beyond the discussion of which individually-advocated issues and activities should take precedence over others. The goal was to develop the ability of Sierra Club leaders to *create and sustain enabling structures* within a relatively unstructured organization.

The baseline conditions for interdependent leadership are a real team with shared purpose, work to do as a whole team, and core norms that define how members work together. These baseline structures do not exist without the direct action of the members of the teams themselves, and we built our workshop activities to teach participating teams how to be self-structuring in this fashion.

In Workshop Three, we devoted most of a day to diagnosing and improving the design of the ExCom leadership teams. We created a series of diagnostic exercises (using the results for each team from the Team Diagnostic Survey, described above) and conducted group activities to teach participants how to redesign their teams. In the process, teams revisited their earlier work on shared values and group purpose (the stories of self and stories of us). They expanded upon this work to establish norms and processes for how

they will work together to achieve their common objectives. We revisited those lessons in Workshop Four, and reviewed all the previous activities in terms of collaborative leadership teams.

Finally, we designed and structured the ongoing coaching component of LDP as a way of *building interdependent capacities* in the leadership teams. Each team identified specific individuals who would specialize in specific leadership topics:

- Team structuring
- One on ones
- Storytelling
- Strategizing
- Task design

These individuals became the designated resources for their team in helping strengthen and maintain the lessons of LDP—and to do so, they had to work together.

Sierra Club ExComs lacked the structure and practices for effective deliberation.

“I used to hate our ExCom meetings. We spent most of our time hearing irrelevant updates about other people’s projects. When we did try to agree on something together, sometimes a single person or two could hold the whole team hostage because they wouldn’t agree when everyone else had come to a consensus—and they’d dig their toes in and refuse to budge no matter what we tried to do to address their concerns. Even when the meetings were more friendly, we didn’t accomplish much. I felt like it was a waste of time, that I should be out working on something more productive.”

Sierra Club ExComs have few enabling structures or processes for high-quality decision-making. In the absence of accepted deliberative processes, groups fall victim to what sociologist Jolene Freeman called the “tyranny of structurelessness”: the inability to accomplish purpose and the resulting chaos. Group discussions then devolve to personal agendas, individual preferences, and “off the books” authority.²⁰

Other groups tend to insist on consensus, on the one hand, or an over-reliance of process on the other (“We don’t decide anything unless everyone agrees”). In all of these situations, individuals who have strong voices are often scapegoated as bad actors. Group members adopt a fearful approach to each other, and assume the worst intentions when disagreements arise.

In contrast, effective deliberation requires a *respect for differences* and a *tolerance for conflict*. These are much easier to cultivate when the group has done the work of

²⁰ Freeman, 1970.

identifying and articulating its shared purpose and values, and has the right structures and processes for addressing differences. If members of the group know what unites them, it becomes easier for them to discuss the subjects on which they disagree. When group members are free to express opinions that might differ from others', and to explain *why* they hold those opinions, the likelihood of misunderstandings is greatly reduced. Group members also learn to accept difficult tradeoffs among the strategic choices they must make.

In order to make effective strategic choices, leadership groups need functional decision-making skills and processes for identifying, prioritizing, and choosing among the vast array of potential activities to undertake. Such skills and processes are fundamental to any smooth-functioning democracy or volunteer organization, yet there are very few opportunities for individuals and groups to develop them.

Table 3 presents some findings collected in the course of LDP to illustrate the above points. Our survey of their decision-making practices assessed the degree to which each team engaged in six key decision-making practices, from 1 = not at all to 5 = a great deal. Overall, their average scores were mediocre to poor:

Table 3
SC Team Decision Making Practices

| Decision-making Practice | Mean Score |
|--|-------------------|
| Used clear criteria for decisions | 3.04 |
| Delegated authority to others | 2.86 |
| Evaluated the quality of their decisions | 3.03 |
| Allowed conflict and sought consensus | 2.78 |
| Generated ideas together | 2.92 |
| Held disciplined meetings | 3.34 |

High-quality decision practices affect three key performance processes in the SC leadership teams. The value of facility in high-quality decision practices is indicated by our comparison of teams with good-quality decision practices measured early in LDP (here captured as “high” or “low” usage of each practice) on the overall quality of their performance processes. Three key performance processes are important predictors of the ability to accomplish team objectives:

- The degree to which team members put forth adequate *effort* at team tasks
- The quality of team performance *strategy* in accomplishing team tasks
- The degree to which the team uses the full range of *talent* individuals bring to the team.

As can be seen in table 4 below, high-quality decision practices affect all three of these key performance processes in the SC leadership teams.

Table 4²¹
High Quality Decision Making Practices Enhance Teams' Effort, Strategy, and Use of Talent

| High-Quality Decision-making Practices | Effort | Strategy | Use of Talent |
|---|---------------|-----------------|----------------------|
| Used criteria | | | |
| High | 3.77* | 3.54 | 3.82 |
| Low | 3.50 | 3.54 | 3.82 |
| Delegated authority | | | |
| High | 3.62 | 3.57* | 3.49* |
| Low | 3.33 | 3.15 | 3.82 |
| Evaluate decision quality | | | |
| High | 3.63 | 3.64* | 3.87* |
| Low | 3.63 | 3.44 | 3.68 |
| Allowed conflict, sought consensus | | | |
| High | 3.73 | 3.57 | 3.82 |
| Low | 3.62 | 3.50 | 3.96 |
| Generated ideas | | | |
| High | 3.62 | 3.79* | 3.88* |
| Low | 3.68 | 3.24 | 3.45 |
| Held disciplined meetings | | | |
| High | 3.74 | 3.47 | 3.78 |
| Low | 3.62 | 3.58 | 3.84 |

In all cases, teams with good decision practices showed better performance processes. The one exception is that teams who delegate authority to others use less of the talent in their own team, as one might expect.

Further, the importance of good decision practices is underlined by how the prevalence of these practices in the ExCom affects what they are able to accomplish as teams by the end of LDP. Table 5 illustrates this point.

As table 5 shows, teams with good deliberative practices such as delegating authority to other groups, evaluating their decisions, allowing conflict but seeking consensus, and generating ideas in a structured fashion are able to accomplish their goals to a much greater degree.

²¹ An asterisk indicates a statistically significant difference in this table and those that follow.

Table 5
Decision Making Practices and Goal Attainment

**Degree of Goal Accomplishment
at end of LDP**

| | |
|------------------------------------|-------|
| Used criteria | |
| High | 3.63 |
| Low | 3.82 |
| Delegated authority | |
| High | 2.33* |
| Low | 4.33 |
| Evaluate decision quality | |
| High | 3.67* |
| Low | 3.20 |
| Allowed conflict, sought consensus | |
| High | 5.00* |
| Low | 3.28 |
| Generated ideas | |
| High | 3.87* |
| Low | 3.27 |
| Held disciplined meetings | |
| High | 3.82 |
| Low | 3.86 |

Developing effective deliberative practices in leadership teams. We introduced into Workshops Three and Four a framework for high-quality group deliberation and the opportunity to practice these skills in the work of the team.

In Workshop Three, we began by introducing a framework for group decision-making that turns the activity from a conflict-ridden process of competing personal agendas into a collaborative process of making high-quality strategic choices. A high-quality deliberative process helps a group manage members' anxiety as they address the inevitable conflicts among their priorities about how best to deploy their resources. Beginning by *establishing criteria* for the group decision that express shared purpose and values can direct the weighing of alternatives and lead to integrative, rather than divisive, solutions. A leadership team that uses these high-quality deliberative skills can unleash stunning amounts of energy among its members by turning conflicts into the creative search for ideal solutions.

The framework we introduced contains the following steps in chronological order:

- **Defining the problem:** What is the choice we face?
- **Identifying outcome criteria:** What are the outcomes that we collectively want to achieve from this decision?

- **Generating alternatives:** What is the full set of possible options we can think of?
- **Evaluating alternatives:** How does each option stand on our criteria?
- **Deciding:** Which one comes out best? What have we missed? Would anyone like to advocate for a different options? How does it stand on our shared criteria?
- **Learning from the decision:** How did this process go? How did the decision turn out? What did we learn from it that can improve our decisions in the future?

Workshop Three introduced three different ways of learning to use this framework. One third of participants received individual feedback on their deliberative behaviors based on their peer ratings collected prior to Workshop One. One third participated in an exercise in which individuals were assigned to practice particular deliberation behaviors in the course of the exercise. One third of participants analyzed a case together that described the deliberative practices of another group. Participants then described to each other what they had experienced and what they had learned or had found challenging about their particular approach to learning.

In Workshop Four, we asked all groups to practice good deliberation skills in their teams. We reviewed the steps of the decision-making framework and asked the teams to apply them to a real decision: How would your group like to celebrate its participation in LDP at the closing ceremony the following day? Facilitators then led the teams through each step of the decision-making process to help provide structure and guide the team in high-quality practice of good decision-making. By providing structure and the opportunity to practice strategic decision making, we helped them to learn new processes while generating collective energy and experiencing the motivational effects of group effectiveness.

Sierra Club leaders offered action tasks to volunteers that were either overwhelmingly large or trivially small.

“When we get new volunteers, we either assign them to phone bank tasks that bore them half to death, or we dump too much responsibility on them with too little direction or supervision. If they survive these first ‘commitment tests,’ we say, ‘You did pretty well on that—would you like to be a chapter leader?’ I’m serious—after the first thing I did with Sierra Club, they asked me if I wanted to be Chapter Chair!”

Why do eager new volunteers with powerful conservation values sometimes decide to abandon local group initiatives? What goes wrong in their experiences in working on Club activities? We learned that one major deterrent is the lack of meaning in boring, repetitive, micro-managed entry-level tasks.²² Another is the tendency to overwhelm good performers with leadership tasks for which they may not yet be prepared.

²² Hackman & Oldham, 1980.

A well-constructed *task design ladder* can remedy both problems. Even introductory-level volunteer tasks can be thoughtfully designed in ways that make them motivating rather than demotivating. At the same time, they can be designed to offer increasing levels of responsibility and challenge, to develop the leadership capabilities of the individuals performing those tasks.

High-quality task design for volunteers offers new volunteers the opportunity to learn the group’s story and connect to its goals, to take on challenging tasks with meaningful outcomes for conservation, to develop new relationships, and gradually to accept greater responsibility within the organization. It incorporates the principles of reflective practice so that volunteers continually learn from their own and each other’s experience. The task ladder helps participants develop their leadership skills as they move from doing a task to coaching others in how to do it, and then to helping create the conditions in which group members can continuously identify and accomplish shared goals.

Early in the LDP workshops, few participant groups were aware of task design as a skill, nor did they possess experience in how to do it. Table 6 shows the average peer ratings, on a scale from 1 = does this rarely to 5 = always does this, describing how often LDP participants engaged in good task design at the beginning of the project.

Table 6
Pre-LDP Deficit of Good Task Design Behaviors

| Task Design Behaviors | Average Scores |
|--|-----------------------|
| 1. Makes sure people get to work on significant tasks | 2.13 |
| 2. Gives others the autonomy to take on big tasks in their own way | 1.96 |
| 3. Challenges others to stretch themselves | 2.24 |
| 4. Identifies specific, measurable outcomes | 2.30 |
| 5. Breaks work down in to small, very simple pieces * | 4.25 |
| 6. Asks people to do small tasks without showing why they are important* | 3.89 |

*These two are *poor* task design behaviors, and higher scores mean poorer leadership.

Overall, participants’ knowledge of the motivational consequences of how they engage others in volunteer work was quite poor.

Designing action to motivate participation and develop leadership. Design an interesting, motivating *phone bank* task that helps volunteers grow into coaching and leadership roles? They said it couldn’t be done: Nothing can relieve the inherent tedium of the phone bank. It’s just something we need volunteers to do. In LDP Workshop Three, we set out a challenge for participants to disprove that “truism.” And they did it. They succeeded by employing the following characteristics of a well-designed task.

- **Skill variety:** It provides the opportunity to use a range of skills, not just one (“I get to debrief with the phone bank team whether the script is working, how to handle difficult calls, different ways to divide the work” vs. “Over and over and over, I dial the phone and repeat the script...”)

- **Task identity:** It is a whole task rather than one small part of a larger one (“I call everyone in this neighborhood, and I need to get 17 yeses” vs. “I just keep calling the numbers listed randomly on this list until time runs out.”)
- **Task significance:** It has meaningful impact (“I’m recruiting people to learn more in this panel discussion about global warming as a first step to getting them to commit to change their habits” vs. “Why exactly am I inviting people to this event?”)
- **Autonomy:** The volunteer can decide how to do the task and how to schedule, order, prioritize subtasks (“Try this a few times and then let’s work out as a team how we can improve it. Sure, you can take a break when you need to.” as opposed to “Just repeat the script exactly as it’s written. No, no, not like that, like this!!”)
- **Feedback:** Doing the work provides immediate knowledge of how well the volunteer did the task (“You met your goal, and now the team is 76% there!” As opposed to “I have no idea how many phone calls I made, or how many are left to be made, or how many participants we need to have, or whether all that made any difference to anyone”).

In a good task design ladder, each level increases the challenge and responsibility offered to the individual, and offers the opportunity both to learn and to teach others. For example, a new volunteer joining a phone bank might join a team, practice using the script, but also debrief with the other members at breaks, modify the script, create a new “plan of attack” for the next set of calls, and monitor group goal accomplishment. Having done that once, the next time she returns, she can be team captain, teaching others the ropes and helping guide their debriefs. And after becoming adept as a team captain, she becomes the organizer of several teams and their captains, etc. Each level teaches a new skill, involves greater responsibility, and demonstrates increasing ability to lead.

LDP participants learned how to diagnose badly-designed volunteer tasks (for example, folding the newsletter for mailing), how to redesign them to enhance their motivational properties, and how to create levels of responsibility that move volunteers up the “ladder” to become partners in exercising leadership in Sierra Club with fellow ExCom members.

Sierra Club leaders were reluctant to hold others accountable.

“Everybody knows that you can’t fire volunteers. So you can’t hold them accountable—they’ll just leave. Besides, if I don’t give other people a break, what happens when I need a break? People are just flaky sometimes. And honestly, I hate asking people to do things they don’t want to do. It’s easier to just get it done myself—or to let it slide for now.”

We observed that many Sierra Club leaders are reluctant to exercise authority in their groups. They fail to recognize that the act of taking on responsibility *confers* authority: in fact, it is their responsibility as SC leaders to create the conditions in which others can commit to group goals and act effectively to achieve them. Leaders must help the group establish clear norms of commitment, accountability, and outcomes—as well as the means a group will use to self-correct so members can require each other to behave according to these norms.

The data in *Appendix I* show how poor the norms of conduct were for many Sierra Club leadership teams at the start of LDP. That is, there were no clear standards of what is and what is not acceptable behavior in the group. Norms are signs that members hold each other accountable to their commitments to shared objectives. They have positive impact on the performance processes of leadership teams, as well as their ultimate success. Two tables of findings from LDP illustrate.

Table 7
Clear Norms Enhance Team Performance

| Clear Norms of Behavior | Effort | Strategy | Use of Talent |
|--------------------------------|---------------|-----------------|----------------------|
| High | 3.70 | 3.55 | 3.82 |
| Low | 3.43 | 3.18 | 3.46 |

As can be seen in table 7, those Sierra Club ExComs that had clear norms (“High”) put significantly more effort into team tasks, developed better quality work strategies, and used more of the talent in the team than did ExComs with poor norms (“Low”). All three findings are statistically significant.

Moreover, leadership teams with clear norms also got significantly more of their team goals accomplished between Workshops Two and Three (Time 2), and between Workshops Three and Four (Time 3), as shown in table 8.

Table 8
Clear Norms Enhance Goal Accomplishment

| Clear Norms of Behavior | Degree of Goal Accomplishment | | |
|--------------------------------|--------------------------------------|---------------|---------------|
| | Time1 | Time 2 | Time 3 |
| High | 2.82 | 3.46* | 5.00* |
| Low | 2.50 | 2.33 | 3.53 |

Developing norms that foster commitment. Since all volunteer effort is based on commitment, we explored how to create a culture of commitment in ExComs and local

groups. We identified the “three Cs” of commitment, all based in a context of relationality:

- Confrontation
- Celebration
- Coaching

We modeled and practiced the three Cs throughout every workshop. For example, we realized that the LDP was demanding a level of leadership from the SC trainers that few had ever had to deliver before. Yet even training team members were reluctant to *confront* each other for failing to live up to the group norms (such as timeliness, focus on the tasks at hand, etc.) they had established. Ganz and Wageman needed to confront the trainers, and insist that they learn to hold each other responsible for their commitment to the group. They later coached the trainers to confront participants when necessary to secure their full participation in the program.

When participants reported on their progress toward the goals they set for themselves and their group, the trainers helped *celebrate* personal and group accomplishments and explored how to improve both individual and overall performance.

We created activities for groups to build skills in asking for commitment and confronting others. For example, as a training team we held a “fishbowl” meeting in which we role-played many dysfunctional non-commitment behaviors that are common in ExCom meetings (arriving late, leaving early, wandering off the subject, taking phone calls, etc.). Participants recognized their own and others’ behavior in the skit, and practiced how to confront and coach each other when such behaviors occur.

One major lesson derived from these exercises was that people who show “flaky” behavior in a group are not “bad” people, but rather people who need to be *coached* on group norms and processes. By failing to confront and correct the dysfunctional behaviors, group members are actually diminishing their own collective power.

Learning the value of constructive feedback. Constructive feedback is critical to the practice of effective group norms. Appropriate feedback combines all three Cs of commitment: confrontation, celebration, and coaching.

To underline the value and power of feedback, table 9 compares the reactions of individuals provided with peer feedback about their deliberation skills vs. others who did not receive such feedback during Workshop Three. The response scale runs from 1 = not at all accurate to 5 = extremely accurate. In all cases, regardless of whether the feedback was positive or negative, individuals were significantly more likely to feel that they learned specific things they could change in their behavior, understood themselves better, and left the session feeling helped than if they did not received personal feedback.

Table 9
Constructive Feedback Enhances Personal Learning

| | Received Feedback | No Feedback |
|--------------------------|-------------------|-------------|
| Learned specific actions | 4.37 | 3.81* |
| Understood themselves | 3.89 | 3.40* |
| Felt helped | 4.03 | 3.61* |

When members of such teams hold each other accountable, they get their work accomplished.

Project Outcomes: New Leadership Capacity in the Sierra Club

Far beyond the typical goals of a traditional training program, the work of LDP aimed to help participants redefine their goals and activities as *interdependent leadership teams*. The idea of working in teams, largely absent until now in the Sierra Club organization, generally proves energizing and even exciting as participants come to recognize how much more effective they can be working in a team to accomplish shared purposes.

Individual participants reported that they developed new skills and a new level of confidence in their ability to accomplish Sierra Club work within a team. Many also experienced the pleasure of accomplishment and the joy of learning how to make a difference for the causes they value. Moreover, since they originally committed to undertake the LDP as whole teams, the lessons they learned were immediately applicable in their collective work for the Club back home.

Individual learning. All participating individuals were evaluated independently by peers and by members of the training team at Workshop One. They were reassessed again at the end of LDP on the same set of skills. Because the number and identity of individual participants changed over the course of the four workshops, it is not possible to calculate change scores for every participating individual; moreover, as both participants and trainers became more sophisticated leaders, they also became tougher in their evaluations of many individuals.

To account for these patterns and still provide valid estimates of changes, if any, in individual skills over time, tables 10 and 11 provide a summary of the *proportion of participants before LDP vs. at the end of LDP* that show sophisticated levels (score high or very high averaging across behaviors and raters) of the core leadership skills.

Table 10
Percentage Demonstrating High Level of Leadership Ability

| | Before LDP | At End of LDP |
|-----------------------------------|------------|---------------|
| Skill as Assessed by Peers | | |
| Relational skills | 22.3 | 49.6 |
| Motivational skills | 25.4 | 43.2 |
| Deliberative skills | 13.5 | 25.5 |
| Action skills | 12.2 | 31.9 |

- **Leadership outcome goals.** These were goals set by individuals about recruiting additional leaders or enhancing the leadership capacity of the Club, for example, by filling open slots on the Political Committee, engaging 12 new members in active leadership roles, and the like.
- **Applying a new leadership practice in the chapter.** These were goals about explicitly incorporating a practice learned in LDP in their conservation and leadership work. For example, some individuals set goals to engage in one on ones for the purpose of finding ways to involve new members in the activities of the ExCom.
- **Conservation goals.** These were outcome-related goals with no specification of leadership capacity-building or attention to process. For example, some individuals set goals such as showing “An Inconvenient Truth” five times.

Team Accomplishments. ExCom teams, too, experienced a new level of accomplishment from the enhanced group efficacy that accompanied the new structures, processes, and norms they created to support their work toward their shared goals.

Follow-up survey data about team-level practices post-LDP are pending and will be summarized in a later document. We present here data assessing the degree to which individuals in those teams learned better leadership skills in the course of their work in LDP.

Team goals were coded on the same dimensions as individuals, though the content of the goals differed from those of individuals. For example, a team goal to apply a new leadership practice might include refining the team’s statement of its core purpose, conducting a diagnosis of its deliberation practices, or instituting a new meeting-agenda design process.

The principal researchers also coded each individual and each team goal for difficulty (from “a lowball goal, easy to accomplish” to “a highly challenging goal”) and its degree of accomplishment (from “missed it completely” to “overachieved”). Analysis of goals accomplished and not achieved serve as further assessments of the degree and quality of learning taking place in the LDP.

Overall, the kinds of goal that individuals and teams set differed. Individuals initially tended to set learning goals and leadership outcome goals, while teams from the start tended to set application goals and leadership outcome goals. Over time, goals for both groups tended to become predominantly application goals: using the practices of LDP to do their work. Goals achieved or overachieved went from slightly less than one-third to more than forty percent both for individuals and for teams between Workshops 1 and 3.

A summary of goals accomplished by individuals during LDP is provided in *Appendix G*. A summary of goals accomplished by groups during LDP is provided in *Appendix H*.

Stories from the Chapters

Cascade

The Cascade Chapter almost didn't begin the LDP training program. There was a great deal of concern that an on-going political effort would be impacted by leader involvement in the training weekends. The national Sierra Club had hired many temporary organizers and dedicated a great deal of financial resources to help pass Prop 937 which required Washington's major utilities (those with 25,000 customers or more) to gradually increase the amount of new renewable resources in the electricity supply to 15% by 2020 and pursue all cost-saving energy efficiency opportunities available, subject to a cost cap as well as accountability and enforcement provisions specified. Benchmarks were set for 2012 and 2016 for utilities to demonstrate progress toward the 15% target. This legislation would serve as a model for other states to follow and was an effort to extend the influence of similar efforts in the state of California along the west coast.

Instead Chapter leaders used LDP concepts to create a more effective campaign effort and get more engaged with field efforts funded by the national Sierra Club. Recognizing that political campaigns engage many new volunteers but doesn't always ensure that they stay engaged after the campaign is over, leaders attempted to build engagement activities that would build relationships and create plans for continuing to engage people after November 2006.

In November 2007, after a victorious effort on Prop 937, leaders looked to continue their momentum and engage volunteers and members through vigorous and proactive efforts in the state.

Although there was internal opposition at the Chapter ExCom level, the Cascade Chapter took a controversial position on another state ballot initiative. The "No on RTID" campaign mobilized the public to vote no to a proposed 182 lane miles of new highway even though the proposal tied funding for roads to funding for public transit and other environmental organizations supported the ballot. Chapter leaders saw this as an opportunity to serve a unique purpose in the environmental community in Washington State. They called for better transit solutions that would address the problem of global warming now and that didn't trap the state in a future of more cars on the road, more car-dependent development, and constantly increasing emissions.

They used many of the LDP concepts to create an effective campaign effort. They used task design to create motivational work for volunteers for any outreach events. They used their new strategic skills to convene regular meetings to discuss options and respond quickly to challenges to their position. Some strategies that they adopted included a rapid response "blog team" that would counter positions taken in opposition on local political blogs – which they recognized as having a lot of influence on political leaders in the state. They also adopted the use of a virtual collaboration tool called Basecamp to track each other's effort and ideas and communicate with each other, work together more collaboratively to draft materials and make decisions. They used their coaching skills to teach others how to use personal narrative to communicate their campaign story and each person's personal connection to the issue.

For instance, Becky Stanley, the former Conservation Chair, recounts that "activists spoke at as many public forums as they could. They went to ones where we were invited and ones where we were not and they stayed on message." For example, at a governor's town hall meeting we showed up and put "NO RTID" stickers on people as they walked in the door and we were prepped and ready to roll out our stories if we got called on to ask a question. Tim Hesterberg (former Seattle Group Chair) got called to ask a question and he told his story of being a scientist and a father – how disturbing it is to be a dad knowing what can happen if we don't take strong action now to combat global warming pollution. It was completely perfect. I don't remember his question, but I do remember his story."

Loma Prieta

The chapter organized a strategy retreat after the conclusion of the LDP training to focus its efforts and to articulate the strategic direction in a way that oriented others. Each meeting of the ExCom begins with an articulation of the mission and vision of the Chapter to focus and orient all present.

The chapter has instituted other new practices and norms that are also continuing after the LDP training – including an action items review at the beginning and end of each meeting, and a practice of sending out notes following each meeting.

Leaders who attended the LDP realized the importance of having an active Membership committee and put effort into revitalizing committee and creating new member activities. They are now doing regular member events whereas before there was one annual picnic to engage members.

As a result of relationships developed at the LDP, leaders from activity committees moved up into other positions of leadership in the Chapter. The chair of the Peak Climbing committee is now running for the Chapter ExCom.

Leaders who attended the LDP used their skills to create a Climate Heroes document that is used in fundraising efforts. The flyer was included in a mailing that helped to raise \$17,000 dollars for the Chapter. (See Appendix samples)

Rio Grande – New Mexico

The chapter has instituted new practices and norms that are continuing after the LDP training – including articulation of norms at each meeting, and regular agendas before meetings.

The Albuquerque Cool Cities committee went from a committee with one very dedicated leader to a core team of leaders that meet every month and help to coordinate two other committees that are run by others. The structure for the committees was set up during discussion at the LDP training.

One of the committees is leading a light bulb outreach program in schools that is so successful that it is being adopted by the city as a government program. The other is a political committee that works with city leaders on implementation of their Cool Cities pledge.

Florida

The LDP training program itself began in Florida with controversy and conflict at the Florida ExCom leader level. Those engaged in the Florida training began to see the behavior that precipitated the controversy in a new light. The focus on collaboration and cooperation that was inherent in the materials that leaders were learning was greatly contrasted with external conflicts and concerns.

So leaders involved in LDP and others outside of the program joined together to highlight and fight problems that had been crippling the Chapter's effectiveness for years. Their testimony led to an internal investigation by the Sierra Club Board and others that supported their claims. The Sierra Club Board recently voted to suspend the Chapter.

This is the first time this type of action has been taken to deal with problems of this serious nature at a Chapter level – a considerable outlay of time and resources to ensure that Chapter and Group health and effectiveness is supported and principles upheld.

Other highlights include the fact that the Central Florida group has restructured themselves. They have used LDP practices to engage new leaders in the work of the group. They were able to recruit a new volunteer coordinator that helps with new member activities. From these meetings, they were able to recruit a new newsletter editor.

Group leaders have put into place new practices related in LDP including creating regular agendas and an “activities barometer” that they use to track their work and outcomes.

Building The Leadership Development Training Community

The Sierra Club now has, as a direct consequence of LDP, expanded capacity to create positive change in the organization. Developing and conducting the workshops has generated unprecedented new skills and teaching capacities that LDP trainers and participants can use to expand leadership capability throughout the organization. *Appendix J* describes the printed teaching and learning materials developed in the course of the LDP, now available on CD-ROM. *Appendix K* lists the initial training team developed through the LDP pilot activities.

This new leadership development community includes:

- A core group of committed leadership trainers who can disseminate the LDP approach throughout the organization
- A core group of highly experienced teachers with expertise in particular aspects of leadership who can present conceptual material and facilitate discussions of depth and complexity
- A core group of capable leaders who can develop experiential materials aimed at helping others to develop their capacities
- A core group of trainers able to evaluate, refine, and create new approaches to the next generation of LDP
- An expanded group of leadership trainers with sophisticated facilitation skills and experience leading others through behavior change
- A cadre of volunteer and staff participants proficient in each of the major leadership development skill sets:
 - Team structuring
 - One on ones
 - Storytelling
 - Strategizing
 - Task design

[See *Appendix L* for a list of Sierra Club members who participated in the pilot LDP workshops and their areas of leadership development expertise.]

Moreover, LDP has created significant and lasting change in how training and capacity development are perceived, experienced, and built in a civic organization. The main changes include a shift:

- From viewing leadership development as delivering information to viewing leadership development as helping others practice essential leadership skills
- From planning and delivering a curriculum to learning in an intentional way what learners need and deliberately adapting lessons to their development needs
- From teaching scattered individuals taken out of their context to bringing intact teams together to develop new capacity and to practice deploying it in their working context
- From relying on the authority of expertise to drawing out others' expertise and coaching the development of new capacities

LDP trainers and participants developed specific skills and the confidence to deploy them. This, too, represents considerable new capacity for the organization. For example:

- Most participants had little prior experience in teaching. Following the pilot round of LDP workshops, the SC now has an identifiable core trainer group of people who can get up in front of groups, ask good questions, structure and facilitate effective learning exercises, provide feedback and coaching for individuals and teams, and generally help other participants derive their own new teaching and coaching capabilities.
- Participants learned how to avoid the twin mistakes of understructuring and overstructuring team activities. They developed the ability to observe group process and adapt in real time—and how to deal with the attendant anxiety.
- Leadership teams learned how to design, structure, and adapt their own and their group members' activities to be relational, motivating, effective, strategic, and developmental.
- LDP trainers learned how to apply the skills of planning, structuring, and adapting their teaching/coaching activities through reflective practice. In fact, all future LDP workshops will incorporate the lessons learned from previous experience—they will be adaptations of the original program.

Taken together and cumulatively over time, these elements of the Sierra Club leadership training community represent a significant—and expanding—opportunity for enhancing the organization's ability to effect major change in the world. As just one example, the SC trainer team has continued the LDP rollout beyond the pilot phase, reorganizing and adapting the materials (based on the learnings from the pilot phase) to create a shorter version that has already been used in Ohio and Rhode Island.

Leadership Development Materials Created

The complete curriculum, including workshop syllabi, participant and facilitator guides, readings and related exercises, and video recordings for trainers to consult for their

preparation is available through the national Sierra Club office of Volunteer and Activist Services. (See also *Appendix J*.) Taken together, these teaching and learning materials offer the scaffolding and the tools, structures, and processes required to replicate the LDP experience in part or in its entirety throughout the organization:

- A detailed method for creating the conditions in which future participants can learn leadership skills, and learn to train others
- A curriculum that includes the structure, tools, and processes necessary to support ongoing leadership development activities
- A comprehensive set of support materials
- An expanding population of individuals capable of imparting the LDP learnings throughout the Club

Implications for Action: A New Approach to Building Organizational Capacity

Sierra Club volunteers, staff, and leadership traditionally viewed training as “delivery” of information to individual participants rather than as a strategically driven investment in building organizational capacity. The LDP offers a different approach: participants learn through practice (head, heart, hands); participants learn as teams; learning is tied to the accomplishment of specific goals; and conditions are created to insure ongoing learning, growth, and development.

To support this new, transformational approach, we urge Sierra Club leaders to avoid trying to “deliver” particular pieces of the LDP training that people may think they need, when what is required is learning a whole new way of doing things that integrates the “parts” in a new, coherent, and effective way. In other words, when a chapter or group ExCom completes the cycle of LDP workshops, it hasn’t simply learned a few skills, but it has been restructured, has begun to operate in a new way, and has greatly enhanced its capacity to achieve its chosen goals. Thus LDP is more of an “organization change” process than an attempt to make minor improvement at the margins. We call this *building organizational capacity*.

Investing in LDP Training to Achieve Strategic Purpose

Training is most productive when undertaken as an investment in creating the individual and collective organizational capacity required to accomplish specific strategic goals. If achieving a major conservation goal, for example, requires new capacity, then the LDP training that builds that capacity will be taken seriously by organizational leaders. Required resources will be made available, and successful capacity building will become an organizational priority.

One way to introduce LDP nationwide could be to emphasize its success in capacity building as a way of enhancing chapter and local groups’ ability to meet the challenge of global warming, act on the national conservation initiative, or influence the outcome of the 2008 election. Recognizing the LDP training as a means of creating the collaborative structures and developing the power required to achieve shared strategic goals—a way to transform the organization’s approach to its work—will help chapter and local groups understand how the training can help them increase their ability to make a much-needed difference in the world.

Structuring Work Teams and Activities to Enhance Organizational Effectiveness

People are more likely to achieve their purposes if they have learned how to structure their work with each other in clear, unambiguous, and motivational ways. By structuring work we mean creating the organizational conditions—clear goals, roles, and norms, for

example—that increase the probability that the team will make good decisions, that the team members will be committed to those decisions, and that they will collaborate successfully to achieve their chosen goals. The focus is less on prescribing strategy than on creating conditions under which good strategy is likely to emerge.²³ The purpose of structuring in this way is not to constrain, but to create the space within which creative work can be done.

Structuring for success begins with a clear assessment of organizational needs. The Team Diagnostic Survey assesses the function or dysfunction of a team according to clear parameters. This enables team members to devise a strategy to build on their strengths to address their problems. Similarly, a chapter or group that wishes to take advantage of LDP needs to have done a clear assessment of what their overall goals are, how they are doing in achieving their goals, and how they want to make the greatest improvements. This will allow the LDP training team to customize the workshops—and the resulting structure—so as to address those concerns and help participants create an appropriate work structure.

Paying Attention to Readiness

Clarity as to team needs, as well as to individuals' gifts and challenges, should encourage active recruiting of people with specific strengths who are *ready* to run for office or serve on committees where they can contribute best. Furthermore, new members, activists and elected leaders must be thoroughly oriented not only to the organization's story, but also to its structure: the roles people play, the norms they are expected to observe, and the processes they must master to do their job.

Effective participation in LDP, too, requires individual and group readiness. Groups and individuals must be open to learning, bring an exploratory spirit, and understand the need to commit to the entire program.

Developing the Power of Moral Resources

As a values-based organization, the Sierra Club has vast reservoirs of moral resources upon which it can draw to motivate its leaders, its members, and the public to endorse and work toward its articulated goals. By moral resources we mean the individual and shared values that drive behavior and motivate Club members to collaborate effectively in important world-changing endeavors.

One of the best ways to unleash the power of moral resources is through individual and collective storytelling. New members, activists, and leaders must have the opportunity to learn to tell their own story and to learn the story of the national Sierra Club, their chapter, and their local group. These stories—and all that goes with them, including

²³ Ganz, 2000.

music, rituals, and celebration, will become the sources of learning, motivation and resilience. It is having a story—and knowing how to tell it—that distinguishes a group of individuals who work in the same place from a community that shares values, purpose, and narrative. In short, the stories create and perpetuate an identity for the community.

Civil rights movement participants, for example, turned to a story of loss and redemption (the Exodus story, the American story), a shared set of beliefs, and celebratory practices (song, mass meetings, etc.) for the inspiration, solidarity, and commitment to persist, to engage others in their movement, and to interpret their movement to the nation. Absent these moral resources, intellectual devices such as cost benefit analysis would have persuaded no one to risk present security in hopes of future success.

The same is true for the environmental movement today. Moral resources remain the most important source of power—the source of motivation to act effectively together because it is the right thing to do.

Implications for Action: Next Steps

The Sierra Club National Board must decide how to take advantage of the capacity created by the LDP to revamp its approach to training, capacity building, and organizational change.

The time to act is now. The urgent challenge of climate change, and the promise of a new Administration, create a setting in which development of greater organizational capacity is both possible and necessary. The capacity created over the past year—and the five years of research, experimentation and analysis that began with the NPLA—must be built upon soon if it is to be built upon at all. This will only happen if the national leadership commits to introducing the LDP as a campaign, with time specific strategic goals, allocation of the resources to achieve those goals, and commitment to an end date by which the initial roll out will be completed.

In order for this to occur, the training community launched by LDP must be sustained, expanded, and renewed. This core group of trainers, coaches, and leaders must be grown to reach critical mass in the organization as a whole, with regional or chapter teams as well as the national team that has been built. The practice the LDP has put in place will not survive in parts, on its own, or in isolated places. It can, however, become a foundation for the ongoing development of organizational capacity in this newly effective way.

The national leadership of the Sierra Club must also commit to creating a demand for LDP throughout the broader organization; educating chapter and group leadership as to why it is needed, what has been accomplished, and how they can participate. Video materials exist that could be adapted for this purpose. Creating a demand for LDP, however, is not the same as offering fragments of training that would ultimately undermine the effectiveness of each and every piece.

Commitment to this organizational change agenda must be shared by staff and volunteer leadership alike for it to work. Staff members must learn to work with volunteers more as coaches than as either servants or bosses—another type of capacity developed by the LDP. By learning how to coach volunteer leaders, skilled staff can have a far greater impact than by either trying to tell them what to do, doing it for them, or doing it themselves. Coaching also turned out to be an important way for staff to learn to work together. Training team leaders learned how to coach their trainers to become more effective both individually and as a team.

Leadership of staff, then, is neither sending them off to accomplish a mission, only to be heard from when and if they complete it, nor is it trying to micromanage every task, every day. The point, instead, is that the organization cannot expect to redefine leadership among its volunteers without undertaking a similar change among its staff.

The Academic Team will develop research papers based on this work for some time to come, but its formal responsibilities to the Sierra Club conclude with this report. At the same time, we think that an ongoing relationship that provides for coaching, curriculum review, and assessment could be very beneficial, given the major investment we have already made in working together on this project.

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Appendix A: Topics Covered in Each Workshop

LDP WORKSHOP #1: LAUNCH AND OVERVIEW

- SESSION #1: Introduction: Welcome**
- SESSION #2: Building Community: Relationships**
- SESSION #3: What's at Stake: Values, Motivation, Narrative**
- SESSION #4: Mobilizing Power: Resource, Deliberation, Strategy**
- SESSION #5: Making It Happen: Action**
- SESSION #6: Leadership Development Project**
- SESSION #7: Closing Session**

LDP WORKSHOP #2: RELATIONSHIPS AND MOTIVATION

- SESSION #1: Introduction: Welcome**
- SESSION #2: Expanding your relational net**
- SESSION #3: Binging new volunteers up the ladder of responsibility by designing motivational tasks**
- SESSION #4: Building effective relationships among Club leaders by managing constructive conflict**
- SESSION #5: Building intergroup collaboration through shared interests among groups**
- SESSION #6: Connecting yourself to shared purpose through telling your public story**
- SESSION #7: Leadership Development Project**
- SESSION #8: Conclusion**

LDP WORKSHOP #3: STRUCTURE, STRATEGY, & ACTION

- SESSION #1: Welcome & Introduction**
- SESSION #2: Structuring your leadership team.**
- SESSION #3: Deliberation**
- SESSION #4: Goal Setting – Story of Us**
- SESSION #5: Strategizing – Story of Now**
- SESSION #6: Taking Effective Action**
- SESSION #7: Reviewing Personal Commitments**

LDP WORKSHOP #4: STRUCTURE, SKILLS, & PRACTICES

- SESSION #1: Welcome, LDP Review & Group Goals Assessment**
- SESSION #2: Identifying Team Purpose**
- SESSION #3, Part 1: Supporting your leadership team**
- SESSION #4: Meetings – Getting to a Good Decision**
- SESSION #5: Meetings – Setting team expectations and structuring your meeting time**
- SESSION #6: Passing the Baton**
- SESSION #7: Graduation and Celebration**

Appendix B: Participating LDP Entities & Workshop Dates

KEY:

LAUNCH – Launch Workshop

REL – Relationships/Motivation Workshop

DEL – Deliberation/Implementing Sustained Action Workshop

END – Evaluation Workshop

LAUNCH - Loma Prieta - May 19 - 21

LAUNCH - Rio Grande - June 9 - 11

LAUNCH - Cascade - June 16 - 18

LAUNCH - Florida - June 23 - 25

REL - Florida - August 25 - 27

REL - Cascade - Sept. 8 - 10

REL - Loma Prieta - Sept. 29 - Oct. 1

REL - Rio Grande - Oct. 6 - 8

DEL - Cascade - February 2 - 4

DEL - Florida – February 9 - 11

DEL - Loma Prieta - February 23 - 25

DEL - Rio Grande - March 23 - 25

END - Cascade - May 4 - 6

END - Florida - May 18 - 20

END - Loma Prieta - June 1- 3

END - Rio Grande - June 8 - 10

WORKSHOPS BY CHAPTER:

LOMA PRIETA

1 - May 19 - 21

2 - September 29 - Oct 1

3 - February 23 - 25

4 - June 1- 3

RIO GRANDE

1 - June 9 - 11

2 - October 6 - 8

3 - March 23 - 25

4 - June 8 - 10

CASCADE

1 - June 16 - 18

2 - Sept 8 - 10

3 - Feb 2 - 4

4 - May 4 - 6

FLORIDA

1 - June 23 - 25

2 - August 25 - 27

3 - February 9 - 11

4 - May 18 - 20

Appendix C: Sample Items of Peer Evaluations from the First Individual Survey

Use the following scale to provide frequency assessments for each ExCom member:

- | | | | | |
|----------|----------|--------------|----------|----------|
| 1 | 2 | 3 | 4 | 5 |
| Never | Rarely | Occasionally | Often | Always |

ExCom Members:

| This individual... | Initials: | | | | | | | | | | |
|--|-----------|--|--|--|--|--|--|--|--|--|--|
| 1. Gives others the autonomy to take on big tasks in their own way | | | | | | | | | | | |
| 2. Helps clearly define individuals' responsibilities | | | | | | | | | | | |
| 3. Is forgiving of others failing to live up to their promises | | | | | | | | | | | |
| 4. Comes across as too instrumental in how s/he gets to know others | | | | | | | | | | | |
| 5. Assumes we all know what we're here for | | | | | | | | | | | |
| 6. Asks great questions that help build rapport | | | | | | | | | | | |
| 7. Tells a compelling story of why s/he cares about the environment enough to do something | | | | | | | | | | | |
| 8. Tells stories that are depressing | | | | | | | | | | | |
| 9. Is creative in identifying resources that the Club can draw on | | | | | | | | | | | |
| 10. Identifies clear criteria for a high-quality group decision | | | | | | | | | | | |
| 11. Tells his or her story about the work of the Sierra Club in a way that inspires me | | | | | | | | | | | |
| 12. Shows how things could be better when s/he tells a story about frightening or distressing events | | | | | | | | | | | |
| 13. Tells stories without any clear general lessons | | | | | | | | | | | |
| 14. Provides vivid details that bring a story to life | | | | | | | | | | | |
| 15. Avoids conflict | | | | | | | | | | | |
| 16. Tells a story in a manner that feels like s/he is telling it to me, personally | | | | | | | | | | | |
| 17. Connects his or her story with the work of the Sierra Club | | | | | | | | | | | |
| 18. Over-structures the decision-making process | | | | | | | | | | | |
| 19. Does not provide enabling structure for group decisions | | | | | | | | | | | |
| 20. Fails to correct inappropriate interruptions in a group meeting | | | | | | | | | | | |
| 21. Tells a story so that you can <i>feel</i> the events unfolding | | | | | | | | | | | |
| 22. Is quick to criticize new ideas | | | | | | | | | | | |
| 23. Makes sure all new ideas get a thorough hearing | | | | | | | | | | | |
| 24. Tells stories that seem too rehearsed | | | | | | | | | | | |
| 25. Leaves the criteria for a good decision unspecified | | | | | | | | | | | |
| 26. Identifies a set of tasks that, when accomplished, will help us achieve our goals | | | | | | | | | | | |
| 27. Identifies who is the right individual to take on each task | | | | | | | | | | | |
| 28. Elicits input from quieter members | | | | | | | | | | | |
| 29. Helps us use a structured process for evaluating options | | | | | | | | | | | |
| 30. Actively mediates conflicts | | | | | | | | | | | |

Appendix D: Sample ExCom Assessments from the Team Diagnostic Survey

SECTION TWO

Here are some statements about your team and its purposes. Please indicate how accurately each statement describes your team. Try to be as objective as you can in responding to each statement--regardless of whether you like or dislike being on the team.

Write a number in the blank beside each statement, based on the following scale:

How accurate is the statement in describing your team?

| | | | | |
|--------------------|----------------------------|------------------------------|----------|----------|
| 1 | 2 | 3 | 4 | 5 |
| Very Inaccurate | Somewhat nor inaccurate | Neither accurate Accurate | Somewhat | Very |

- ___ 1. Team membership is quite clear--everybody knows exactly who is and isn't on this team.
- ___ 2. There is great uncertainty and ambiguity about what this team is supposed to accomplish.
- ___ 3. This team's purposes are so challenging that members have to stretch to accomplish them.
- ___ 4. Different people are constantly joining and leaving this team.
- ___ 5. This team's purposes are specified so clearly that all members should know exactly what the team exists to accomplish.
- ___ 6. Members of this team have their own individual jobs to do, with little need for them to work *together*.
- ___ 7. There is so much ambiguity about who is on this team that it would be nearly impossible to generate an accurate membership list.
- ___ 8. This team's purposes are *not* especially challenging--achieving them is well within reach.
- ___ 9. This team is quite stable, with few changes in membership.
- ___ 10. The purposes of this team don't make much of a difference to anybody else.

Appendix E: Sample Questions from Trainer Evaluation of Participants

Name: _____

Chapter: _____

Group: _____

TRAINER: PARTICIPANT EVALUATION



This survey asks you to evaluate the participants that worked closely with you during the workshop. Please answer each item as frankly as possible. The evaluation should take about 10 minutes for each participant.

Your responses will be kept completely confidential. Please do not talk over the questions with trainers until everyone has completed the survey.

For each participant you worked closely with during the workshop, please answer the following questions:

What is the participant's name and Chapter/Group?

Please evaluate the participant's behavior in the workshop. Use the following scale:

1 2 3 4 5
Never Rarely Occasionally Often Always

Relationships and shared interests:

The individual...

- _____ 1. Was able to be deliberate about identifying shared interests.
- _____ 2. Asked great questions that helped build rapport.
- _____ 3. Avoided saying much about his/her personal values.

Stories of hope:

The individual...

- _____ 4. Was unable to tell a compelling story of why s/he cares about Sierra Club.
- _____ 5. When s/he told a story, you could *feel* the events unfolding.
- _____ 6. When s/he told a story about frightening or distressing events s/he also showed how things could be better.

Appendix F: Sample Workshop Assessment Questions

Your responses to the following questions will help us improve the Leadership Development Program. Please take the time to let us know what worked well and what could be improved.

1. Overall, I would rate this training as (circle your answer):

Very poor Poor Neutral Good Very good

Please explain why you chose this rating:

2. What about the training was most useful to you?

3. What about the training was least useful to you?

4. List the three most valuable things you learned during this session:

a)

b)

c)

5. What will you do differently as a result of this training program? Please be specific:

6. Was the training effective in providing you with skills you can use to build your leadership capacity?

Please explain:

INDIVIDUAL SESSIONS

Please rate by circling one number on the scale in each section

(5 = outstanding, 1= needs improvement) to provide feedback on the following presentations:

INTRODUCTION: Welcome

5 4 3 2 1

What was useful in this section?

Are there any improvements that could be made to this section?

Appendix G: Individual Goals Accomplished

| Individual Goals Workshop #1 | Individual Goals Achieved Workshop #1 |
|--|--|
| I want to enhance my ability in relationship building by calling members & meeting one on one to increase our volunteer base (5 meetings) | Made 8 asks, got 8 yeses |
| Also, I will assist Ilse by calling at least 5 members and requiring commitment (yes, date, time) | 10 calls, 6 phone call & letter, 3 commitments |
| Engage non-active members to get involved | 4 new volunteers (2 to write newsletter articles, one to table, one to create a database) |
| Tell my story to engage others to share work on setting the setting so other can take responsibility | Recruited 2 people using story, they are now participating on energy issue |
| Delegate by calling people to attend ConsCom meeting, Serve as "Liaison" | Helped establish cons com; conducted 3 cons com meetings with 4 members |
| Set up system for engaging new members. | Getting volunteer sheets distributed at meetings or online, looking for new members, found system exists. Implementing new member party. |
| Daily Monday - Friday phone call to current or potential volunteers | 5 calls a week made to current or potential volunteers |
| Recruit Toxics Chair, Vice Chair, or new chair; 1:1 phone calls with potential leaders around the state to recruit new chairs, officers, etc. | Not yet, emailed |
| Try to recruit people to create a political committee | Political Committee - now have 6 members & myself |
| Become better organized | Better organized - folder for each committee |
| Invite more ExCom members to come to leadership development. Goal: leadership tag team in case each of us can't make all the meetings. | Supported Janet S. coming to session #2, Promoting LDP impact & opportunity by promoting consideration of other ExCom participation |
| to call all local members (Oak hill, edgewater, New Smyrna), get on the board agenda, recruit 10 people for phone tree, start delegating authority | 3 people recruited, delegated to a political committee |
| Lunch once a week with a volunteer, | 3 successes and three failed attempts to schedule others for lunch once a week with a volunteer, |
| Make use of a 3-way calling and develop chapter skills for Internet; A way to share info from national (CCL/CGC/Board) with all FlexCom members "TRACKER" for our chapter lawsuits | Made use of a 3-way calling and developed chapter skills for Internet; Have not yet found a way to share info from national (CCL/CGC/Board) with all FlexCom members or developed a "TRACKER" for our chapter lawsuits |
| Mentor relationship with Volunteer coordinator (Cassandra). | Some progress with Cassandra (phone conversation, clubhouse & plan to talk), |
| 1. Form Miami Group energy committee, 2. Compose a basic outline for chapter energy comments, 3. Compile Group's energy comments, 4. Negotiate final comments, 5. Organize group energy committees into: A. Coal Plants, B. Nuclear Plants, C. Biomass feedstocks and Plants | 1. Only have chair & co-chair, 2. Outline complete, 3. Compilation complete, 4. Final comments complete, 5. coalplants yes, others not yet |
| follow-up on 6 people from his control list | Follow-up done for 2 people, no commitments |
| Develop & implement creative ways to communicate w/ our membership thru learning MUIR & HELEN (b/c we have lost our ExCom person who did this) | |
| Practice telling 2-4 personal stories or anecdotes | Also got two stories as a result of 1:1's. Gotten really good with two personal stories. Started successfully incorporating other, non-planned stories into all interactions. |
| Marry analyses & storytelling - Restructure and deliver one of his existing speeches | Restructured & delivered in Sept. Will give again |
| 8 one-on-ones | 2 meets & 2 added conversations |
| 10 one-on-ones | 10 meets |
| 2 one-on-ones by August (in person) | Participant engaged in relationship building with two individuals in person; she followed up with them afterwards by writing letters which she shared with me. |
| Engage in 4 1:1 exchanges, | Met Goals: 4 1:1's. |
| To motivate people to join Sierra Club and to get them involved in their local geographical group or to try out different committees and outings at the local level and/or chapter level | Met Goal: 3: 1:1's. Engaged 3 members in leadership positions; hosted a LDP Story Telling Potluck Dinner in July |
| Expand social contact to Black Mountain Group | Met Goals: Met/hiked with BMG |
| 2 one-on-ones | 2 meets |

| Individual Goals Workshop #1 | Individual Goals Achieved Workshop #1 |
|---|--|
| Take storytelling part to ExCom to practice our story...everything we do should work story in. Take concept and support and sustain through organization of ExCom. Spread the story. | Taking message to EXCOM, carried story to city mayor |
| Get specific commitments from 5 people by asking for them | 2/3 there on specific commitments |
| Enhance my own resources rather than demonize the opposition; I enhance my own resources by having faith in my own story. I will use that story at County Council, P&Z, & water meetings to further the cool cities initiative - | 1 co council, 1 water, |
| Get help with programs, coordinate with Brian and Janet Stenko | Cheryl coordinating & another person (Lisa) on snacks, delegating - more involved, need to stay in touch with Brian |
| Personal engagement (10 "asks") to recruit two new members for solar permit task force | Reached out to two chapters for solar permit; multiple new people engaged. Went to see Monumental to learn from David Brower's personal story. |
| Engage in 2-4 1:1 exchanges, | Held four 1:1s, got four commitments, two of which were followed through on. |
| Improve organization skills, Better use of time | Organizational skills better, time use fair |
| Ensure I greet at least 6 unfamiliar people at Sierra Club functions to establish a preliminary relationship | 5 of 6 |
| Contact SSC leaders in Florida and organize her contact lists into a database | In process; participant has contacted someone from SSC. |
| Maintain contacts - record progress and failures, Re-enforce (urgency) of the message: all leaders must realize that MUIR is the tool all can use for membership (leadership) development, Don't leave home without a current list of all members in addition to all leaders plus know your own i.d.# | discovered need to conference call to MUIR users, bringing list of members all the time |
| Develop personal story | Practiced telling personal story. |
| 100 calls/week | 15 calls |
| Be less overwhelmed - delegate one of his leadership roles to a new person | Yes, but person resigned |
| 8 one-on-ones | 3 meets |
| Create 2 personal stories, | 1:1's. Refined personal story |
| Articulate spokes person, local sub meetings, committee meetings, county government meeting auditors, city government meeting auditors | spoke to a few |
| Follow through with projects | Improving |
| One on one with members | Uses public speaking bio to tell her story |
| Organize materials, files | Improving |
| Tell a better story - Practicie telling a story 3 times | Told story 4-5 times |
| Explore the relationship between privacy and relationship-building, Engage in 3 1:1 exchanges | 1:1's completed successfully. Seeing positive benefits from training in personal/public relationships |
| Work on personal stories | Worked on telling story different ways. |
| Improve communications, voice strength - understanding, - confront when needed s fear - STAND UP FOR ME | communication skill - better, voice stronger, confrontational skills better |
| Upgrade computer skills - Wild, etc. | Computer skills - better |
| Practice one-on-ones on phone (5) | Participant has set aside time to work on his goal the week of August 21. |
| Engage in 2-4 1:1 exchanges | Met goal of three 1:1's. |
| Political Campaign: Help/Tricks/skills | Yes - with the new ECO training |
| improve computer skills | pressure to get things done leading to better computer skills - bought a laptop |
| Put together Fundraising Committee with Linda and have a fundraiser. Work with Janet Political. Max ? | Began comm - investigated alternatives, communicated with other orgs. For ideas & partnerships, currently working on specific events |

| Individual Goals Workshop #2 | Individual Goals Achieved Workshop #2 |
|---|--|
| Expand my network of contacts | Made new contacts. 3 major volunteers brought in. Group got 8 new volunteers involved; Also, Previously between first & second workshop, Ilse did a 1:1 with Mark who has worked with the chapter on the legislative process, gone through CCAE and become a registered lobbyist for the chapter! He is also on the group excom. |
| Party phone calls | New Member Party Stories Told, More Parties Planned |
| I.D. "party animals" for list | ID'ed 5 people to help with party. Formed a team to help her get elected to school board. |
| 1. Building a group Political Committee | Created political com by recruiting members - |
| "Mover & Shaker" list | "Turning 'em away" |

| Individual Goals Workshop #2 | Individual Goals Achieved Workshop #2 |
|--|--|
| Develop 5 new volunteers for leg/pol comm, | 5 new volunteers for leg/pol |
| To create a database of 35 Pinellas County environmental organizations, including at least one human connection within each organization and to then share the entire list with those leaders. | 50 orgs in database, human connections with 20 of the orgs, will send in mid-March |
| Help re-vitalize Broward Group; help them organize an fundraising holiday party; bring in new people; | Helping to revitalize Broward Group as new group chair. Started a fund-raising plan, |
| Create resources for new officers, Assume PCS chair role & create opportunities | Filling positions, creating positions, creating documents |
| Recruit more Committee Chairs; | Recruited committee chairs, |
| Creating resources for new officers, | Verbally passed on suggestions to new officers; |
| New officer training brochure, | Brochure, PA weekly Ads, Flyer, |
| Weekly Conference Calls for ExCom leaders; | Set monthly calls |
| Develop & hone personal Story - tell story twice to large groups, | Told Story 3 times and did radio interview |
| Recruit 15 new people for an energy committee. | 18 new members recruited for energy committee |
| To further develop personal story through transformation of yard to Florida Friendly yard and to tell personal story publicly in 2 new ways. | Yard in progress, told story publicly 3 times (Excom, planning retreat, newsletter |
| Hold LDP workshop, focus: task design | Workshop held in Nov. 06 |
| Tell my story @ new member meetings | Told story |
| Recruit for committee by bringing in new members at entry level | Got 4 positive responses |
| Meet & greet 4 people; | Way fulfilled his commitment to meet and greet 4 people – As he set up the food he greeted over 50 people! |
| To set five one-on-one appointments with leaders from five different environmental organizations in order to build stronger network ties. | Had 5 one-on-ones |
| Develop new members questionnaire | Completed |
| Networking | met new peak climbers & encouraged them to join meeting |
| Strategize with leaders to get power, cool cities and other orgs | Some success getting plugged in cool cities - fun |
| 2 one-on-ones; 5 personal letters | Made calls to recruit committee members |
| Welcome and orient new FL ExCom people; Stress team work; task sharing; Continue to add necessary FL ExCom information on chapter web site. | Welcomed & oriented new flex come people, instituted task sharing |
| Diversify participants - black and latino members | Recruited new outings participants including minority members |
| Design task to disseminate CCL info and do it. | Through my prior suggestion (and others) CCL ExCom has created more useful monthly reports; Got regular 5 on mtg.; condensed monthly stuff (4 mos reports) |
| Share phonebanking exercise with CAN steering committee | One share |
| Mentoring of new FL ExCom members. | Mentoring members of Group ExCom |
| Apply task redesign to the Guadalupe River Trails Project | Tasks assigned for core team |
| Continue to organize meetings/agendas, | More meetings, |
| Re-design and implement one task with entry-level component | Added one entry level component to an existing task |
| 12 one-on-one calls | Made 1/2 of the calls, engaged Sierrans outside his county in group activities |
| Journaling by Thursdays | Did very well on reflecting and keeping in touch by journaling and email. |
| Develop & hone personal Story - tell story twice, outline it & do a formal analysis - | Told Story 6 times, and got feedback. Not always as positive as he had hoped, but good lessons |
| Commit to journaling every week to understand how reactive I am & how I let me creative tension be diminished by emotional tension; | Journalled and emailed a lot. Kept calm and addressed issues to focus on goals at ~ 8 meetings. |
| Listen better as working on developing integrative solutions | On a scale of 1 to 10, I have achieved 5 times out of ten |
| Vice chair goal: 50 trips in 2007 | 42 so far! |
| Education & Outreach - Education on climate change - Showing of Inconvenient Truth - Green forum in Oct. educating public on I - 933, 937) | Set up the Forum - 75 people came |
| Expand Solar Permit Fee Campaign to other chapters -- New Cities to change | 2 other chapters on board - 48 cities toward fees |
| Organize Post Election Events, | Org. Post Election events; |
| Convene joint strategy meeting on sprawl and energy projects between national, chapter and groups | Energy/Sprawl are now our focus as a joint campaign with national |

| Individual Goal Workshop #3 | Goals Achieved Workshop #3 |
|---|---|
| Recruit 5 new outings leaders with diverse backgrounds. | Recruited 5 new outings leaders with diverse backgrounds. |
| Get Cons. Com. & EXCOM on board with hometown democracy campaign To engage Sierrans outside of Loon County in our programs: Practice 1-1 phone calls in order to engage Sierrans outside of Loon County in our programs. Meetings of other group activities, including serving on group ExCom. Attend meetings of env orgs in adjacent counties to listen and inform | Cons. Comm. On board Set aside week of 21 Aug. Did ½ of 1-1 phone calls. It then transformed into a cooperative activity with Susie Caplowe and Linda Jamison. Big Bend ExCom now has 2 of 7 members from Taylor (coal plant) county. We also replaced our Wabulla County member with someone else from that County. |
| FL & NC to work together on Nuclear Power Plant issues - build a team using LDP info | Contacted FL & NC activists. |
| Helping to provide clear direction with public story: I will work on my story for Coyote Valley & EIR public event | Yes |
| Will work on engaging in positive deliberation by leading effective discussion of group norms | Had a number of deliberative discussions |
| He will also work on using the phone where the phone is needed (calling excom members who don't use e-mail much) | Has used phone some - had good one-on-ones |
| Delegation (2007 action plan), communication w/active members, Follow ups from last meeting , Involving committee in decision -making and project evaluation. | About the dot – saw herself as the dot – burdened, felt that if she disappeared, the whole committee would disappear. She attended to the learning of these LDPs, and now we are flourishing as she is listening and putting into practice some of the learning from here. Now we are more of a team. And everyone on the committee knows the words “norm” and “dot” so we are educating our committee to know the language of LDP. |
| Develop a clear direction with public story and tell it at 3 different groups larger than 5 people | Told story at several events |
| Delegate more, foster commitment, work on redefining roles, and creating accountability. | Goal Achieved: delegated tasks |
| Delegate tasks, fostering commitment, create accountability: target 2 people on excom. | Del tasks: Jody to set up county meetings, Mark to set trail work, met w/membership committee and came up w/a plan. |
| Will work on delegating tasks. At our June LDP meeting, he will have found some people to take some things off of his plate | Is doing less, as planned |
| - Formalize Excom norms. | - Set Excom norms. |
| Learn how to structure a leadership team. By May 1 she will look at other chapters/groups and outside groups for effectiveness, will put together a framework for restructuring. She will attempt to map the “as is” and then the “to be” | Goal Achieved: Had fun, stuck with task of redefining roles |
| Compile current contact info for group chairs, delegates and conservation coms. Get group ExComs to report back | Compiled the list |
| Obtain info on 18 group delegates expectations of Chapter ExCom; Compile that info for LDP team; | 1. Contacted all 18. 2. Compiled info |
| Coaching | Coaching John Hedrick; |
| Introduce better group processes to Lox Group by regular agenda calls, clarifying procedures, contact 18 group chairs | Doing agenda calls, changed procedures; good response |
| Delegating tasks, fostering commitment, creating accountability: I will delegate tasks, foster commitment, and create accountability in Cool Cities Teams that I am coaching. | Achieved goals with Mountain City Cool Cities Team: they need no more coaching and have been 'weaned.' |
| In one instance where a team member doesn't follow through on a commitment I will practice creating a culture of accountability by stating clearly why that commitment was important and re-energizing and/or re-assigning that task. | Set up meeting with individual to discuss responsibilities and follow-through |
| Engaging in positive deliberative behavior: Listen to others before speaking out on an issue. Engage or enable all others to participate in the process. Research background resources before the process. Help guide process to determine goal in a concise way and keep decisions focused. | I do try to ask others their opinion but still do talk too much. |
| Will work on structuring an effective leadership team | Worked with 3 volunteers |
| Share 3 LDP techniques with Excom. | Shared 2 LDP techniques (story telling & norms). |
| I will spend time to define and delegate tasks and set up structures to facilitate accountability. | Defined and delegated some tasks. |
| Ask 2 people to help with media outreach for March 8 “Inconvenient Truth” | Asked Kurt for help, had 80 people at meeting |
| Goal B: With Broward Group, more one-on-ones; | More one-on-ones; |

| Individual Goal Workshop #3 | Goals Achieved Workshop #3 |
|--|---|
| Engage in positive deliberative behavior in order to move toward our challenge and outcome. My calls will begin after we get full excom meeting 3/26. I'll call Gibson, Apple, the 2 Wheelers, all county. Then contact the other PowWow contacts to form a larger presentation/strategizing meeting. If the excom agrees, I'll contact the developer and give them a heads up that we're looking for LEED-Silver –Equivalent standards. | Called Gibson, contacted Dave Griggs – changed tactics after we discovered county had already included LEED in the lease- we decided to contact the developer. |
| In supporting the deliberative process, be more open when considering actions. Don't reject potential options out of hand. Consider longer. Get feedback from other excom members at end of each meeting. | Has been more open to discussion continuing when considering options at meetings. Has not gotten feedback from other excom members after meetings. |
| Work on public story. Practice and present as a speech at Toast Masters. Incorporate improvements on Toast masters feedback. Present story at the next Pajarito Group meeting April 2. | Has mentally practiced the group's story but has not presented it as a speech at Toast masters. The Pajarito group meeting Apr 2 was cancelled so did not do it there. |
| Once Section has better defined roles, will get commitments from new potential leaders, will ask new people to determine their interests and follow-up to plug them in. He will think through potential candidates and help them find appropriate leadership roles. | Goal Achieved: redefined roles |
| Goal C: Help group and individuals set goals | Some success in setting goals. Praising those who did a good job and attempting to reward those working hard on their individual goals |
| Goal A. Keep better track of time – using Yahoo | Doing better scheduling |
| Structuring an effective leadership team: Goal: Establish/produce report on what other Chapters do. | Yes. Researched roles in Chapter ExComs for Karen and the current EC. Basically, I called various Chapters and did 1:1s. The topics I got info on were: Fundraising Employee roles ExCom member's additional roles in Chapter Norms Getting good people to run for ExCom |
| Contact people who attended Coastal training. | Contacted people from Coastal training. |
| Schedule feasibility of screening locations by March 1 | Was shown but not by SC |

| Individual Goals Workshop #4 |
|--|
| Will use one on ones' to reach other Peak Climbers |
| Help plan LDP Event. Story Training @ ExCom |
| Continue to work on relations between Chapter and Group. |
| Teaching |
| Invites to meeting and help implement meetings. |
| Will contact Gary (group chair) to set-up a meeting with him and other LDP participants to share ideas and offer support for implementing them |
| Continue to provide staff support |
| Carry LDP Practices & Principles to the Belmont Group |
| Contact proper chapter folks (chapter chair) about what the new relationship this group will have with chapter will be |
| Keep in touch with Field staff |
| She will organize the second social |
| Servant leader – Coach/ Strategy man |
| Team coach - working to insure an interdependent and high performing team |
| Commit to Town Hall meetings with Cathy in different counties. |
| Continue storytelling Coaching; |
| Help with task designs: ID opportunities to break things into tasks & make tasks workable. |
| Will do & coach 1:1s. |
| Help w/LDP incorporation with stories & storytelling coaching. |
| Team design improvement, coaching, gentle reminders at meetings, |
| Coordinate strategy sessions |

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| Individual Goals Workshop #4 |
| Task design training for a more general population of activists. |
| Team design training for the Energy Committee. |
| Team Design training for people working on adding LDP ideas to the Strategic Plan. |
| Excom training on Task Design |
| Will appoint an ad hoc committee to fill vacancies and will mentor each recruit. |
| Will help define the goals/purposes of the Chair positions |
| Story coach - encouraging to bring out the best and the brightest of current and new leaders |
| Strategy Coach - to create the framework for a strategic plan |
| Task design - from start to finish we are going to follow the ladder |
| Make sure agenda reflects most important work |
| Will head up a team of LDP group delegates to bring LDP learning to chapter |
| Define cohesive team and a measurable goal; |
| Make sure norms are followed |
| Attending mid-course review; help chapter entities operate strategically |
| Strategic analysis coaching |
| Drive accountability; focus on shared purpose – every mtg |
| Work with PCS to bring LDP to other activity sections |
| BEC training – share LDP principles |
| Send agendas & re do with input. |
| Will present the idea of developing story to the excom and will ask Ryan to tell his story at the next general meeting, and then rotate among excom members. |
| Training for Energy and Coastal committees. |
| 1-on-1 potluck |
| Loves working on agendas – willing to be a buddy for Mike. |
| Decision making master/ mistress |
| Effective meetings master |
| Create new meeting format starting 22nd; Invite List w/ Mary... |
| Share what we learned about task design - |
| Work out schedule facilitation rotation... Who goes first and coaching; |
| Help Brian with 1-on-1 potluck |
| Focus on "real team" efforts |
| Coordinate various random group activities to focus them around priorities |
| Use one-on-ones to connect outside of regular circles |
| Will create a formal document from work to define goals and purposes of chair positions; |
| Will put together an outline of LDP material to convey to NW excom members |
| Will talk to group delegate in his group to bring LDP into his group. |
| Will use one on ones' to reach other Peak Climbers |
| Help Karen consolidate LDP-generated ideas; |
| In membership Committee, create design for LDP Practices & Principles. |
| Make commitment, keep commitment, or notify early |
| 1:1s |
| Add LDP ideas to strategic plan. |
| Make sure agenda reflects most important work (w/ Barbara) |
| Serve as task design coach |
| Make efforts in continuing LDP principles |
| Help to get buy in from ExCom on shared purpose. |

Appendix H: Group Goals Accomplished

| Group Goals Workshop #1 | Group Goals Achieved Workshop #1 |
|---|--|
| Identify, recruit & develop new leaders from our inactive membership | Political Committee Formed |
| Get 30 commitments from people to show up at the No-Drilling Beach Party; 12 Commitments from people to attend July 20 program; 10 phone call follow-ups post July 1 No-Drilling Beach Party; 60 Commitments from people to attend July 30 Coastal Forum; 40 Commitments from people to attend Dog-Days-of-August Potluck at Pat's | 125 people showed up at the No-Drilling Beach Party, 9 new people showed up to the July 20 program, Between 200 - 225 people attended July 30 Coastal Forum, 40 Commitments made to attend Dog-Days-of-August Potluck at Pat's |
| 1) Get three people to fill ExCom vacancies, 2) Resources - a membership list, a huge pool of talented people, 3) Strategy - identify potential leaders from list and from community - call these people & meet 1-to-1 | New Team approach - made a plan - met together brain stormed a list of names, found 25 names - 500 members, called set-up 1:1s, got 2 responses - 2 new leaders; New: needed Questionnaire e-mailed to 200, 1 response - 1:1 - new excom member; Ilse ask a hiking buddy - new enviro chair: sent Questionnaire out again (rewritten) no apologies & 1 new vol - election committee; NL - got new web master |
| Develop programs that will diversify the offerings of the BMG to use as vehicles to increase active participation of our members, as well as develop leaders. (ConsCom of 6 people up and running, Calendared 2 new activities, New member meeting follow up, Suzanne will divide names, rest of ExCom will make contact) | Held 3 Cons Com meetings; Had 2 new activities (outings), set up a joint hike with SBG |
| By August meeting increase leaders in the chapter by recruiting 18 Groups Energy Chairs and Energy Committees. (note that a few already are in place) | 11 Recruits, 19 Contacts, 2 committee chairs, |
| More people to outings, meetings, and volunteering, More members from St. John's and Clay in their communities, Let us know of issues, More attendance at St. Johns meetings, Membership plan for general and new member outreach, Membership camping weekend | Taking message to EXCOM, 11 new volunteers (double # in database), Beginning planning for new member (6 mos.) event |
| Increase the number of active participants - Each core group member (everyone involved in the LDP process) has three 1:1s, The group will organize a social event, with a goal of 25 people attending, The group will publish an article in the chapter newsletter to attract more participants | Held the salmon event and a picnic, Now have 8 active participants (used to be 1!) |
| Expand the membership of committees: 8 new committee members on each committee by Aug. 27, 2006 - Excom members must recruit committee members (tactics: name & number gathering, phone calls, 1:1s) | Held excom story training, recruited 3 members at each of 2 meetings (6 total) |
| Build/develop Core Group: At the July 11 meeting, the group will present their LDP weekend report-out, and potentially recruit new core leaders to join in the LDP process - The core group will schedule an intermediary meeting after the general group July 11 meeting; 2) Create organizational structure/mission/strategic plan at the intermediary meeting -The group will solicit input from the general group for this at the July 11 meeting before drafting a plan at the smaller intermediary meeting | Accomplishments/Successes since last training weekend: - Presented LDP report at Water & Salmon meeting, Core group kept in touch, The group picked a project to work on as a team (Salmon Planning Act, Salmon viewing/picnic event), Developed a capacity-building vision (build core group), Built relationships and knowledge in the group. |
| To engage 30 members in one-on-one relationship building conversations, leading to 9 new Club activists. | 18 one-on-ones, 2 new people |
| Relationship building ~ 50 1:1's with purpose of collecting stories and soliciting needs, Hosting storytelling dinner - Common Purpose: To develop mechanism to nurture and sustain chapter activists at all levels | Partially met Goals: 25 1:1's. Successful storytelling dinner |
| To recruit 3 teams of 2 college students (6 total) who are committed to the Cool Cities program and to going out to high schools 2 make presentations about efficient energy use in the home and train high school students to go to homes in the community and show families how to use energy efficiently and save money - 13 week outcome: 6 college students recruited and 2 trainings held with them on a) relationship development and b) getting you message across & motivating high school students 2 action | Article in Sierran, 2 people in Los Cruces City that want to work on cool cities |
| Identify a signature task for the Chapter where we can be proactive and be leaders | Created a process for selecting & filling issue chairs & committee with the most qualified individual , delegated task to implement |
| Investigate cleanup of waterfront options | Investigated clean up of waterfront options, |
| Stop the water bottling plant | Brian Paradise petitions may have stopped water bottling plant |
| Solicit input from 18 groups on the draft national energy plan, compile them with the chapter's comments and forward them to national by the deadline. | conference calls - 6-16 on each |

| Group Goals Workshop #2 | Group Goals Achieved Workshop #2 |
|--|--|
| Group Goal Workshop #2: Plan a party and use the planning process to get new members involved | We fulfilled our commitment to put on a party & involve Los Alamos environmentalists and got relatively new and new members engaged. Had a meeting of the core folks (Jody/Ilse/Dave) and made a plan to present to others. Had a potluck with 10-12 people and formed chairs and committees. Had a meeting 2 weeks later and people had kept their commitments! People were committed and communicated by meetings and email. Had great event with food, alcohol, and music. Had between 150 & 200 attendees. Brought environmental groups together to network and citizens to be educated and express ideas. |
| Group Goal Workshop #2: Recruit and Build Leadership in North Florida: 3 New Activists for an Energy Committee, 5 new people from Taylor County, 3 new student activists | 25 people from county, recruited leadership in NW Group; yes recruited 5 new energy comm.. members; yes recruited 3 new students |
| Group Goal Workshop #2A) attract and retain volunteers | New volunteers & Marilyn is helping larger exposure |
| Group Goal Workshop #2: To build a network that includes 35 experts who can give presentations and who can monitor and report on specific issues affecting particular areas | 20 trained advocates, 15 to follow-up with |
| Group Goal Workshop #2: 1. Reinvigorate Political Committee w/ 3 new people on functioning com; 2. Development of new leaders as follows: Hood - 20 new volunteers, 3 new leaders (level 2), King County - 100 new volunteers, 5 new leaders (level 2), Tacoma - 40 new volunteers, 3 new leaders (level 2) | 3 New leaders on Legisl. Com.; Co - 2 new volunteers - revitalizing old group |
| Group Goal Workshop #2: 1) Fundraising Co-Chair (Chapter); 2 members of Fundraising Advisory Board | Developed job descriptions; Made calls and sent emails to recruit; Send out a March Appeal |
| Group Goal Workshop #2: By Dec. - recruit vice chairs/co-chairs for all chapter committees (30-40 committees) | 6 Co-chairs of Flex com committee/officers several new co-chairs of conservation committee |
| General: share the vision, tell the group story, describe successes, provide feedback, task design | Found Candidate: "Branding", Tom has been to 3 - 5 group meetings so far, re-did website (some response), have been telling group story, celebrated freedom commerce center (6 year campaign) told what worked and didn't on FCC, task design for teenager - he left |
| Create pilot task redesign for one Chapter Committee or Chapter office and spread task re-design to other sections/committee chairs via personal coaching. Requires: • Create list of Redesigned Tasks • Create entry-level tasks for new volunteers • Improve Mechanism for new volunteers referral • Create list of existing tasks and evaluate for entry-level; Work with Fundraising Chair to incorporate networking, task design, and storytelling. | Volunteer Advocate, November Event, Sched. w/ conserv. Committee to pass on LDP, Pol has set up training schedule, Mem Com - new volunteer recruited, trainings, Improved the mechanism for volunteer referrals; Created a job/job description: Volunteer Advocate; Twenty-five attendees at November LDP follow-up event (2 new participants); Held Meeting with Conservation Committee; Scheduled mini-trainings on LDP: March '07; Stimulated the Political Committee to set up training schedule |
| Engage volunteers to develop functioning committees: 1) Issue chairs create a task list for new volunteers, 2) Create a task ladder, 3) Identify educational skill requirements, 4) Create selection questions (interests, experience, etc.), 5) sign in sheet at fundraiser with Sierra follow-up 9/9/06 | Membership chair has created a sign in sheet that asks participants what their volunteer interests are. Is also asking chairs to identify tasks they need help with. |
| Redesign tasks associated with Guadalupe ExCom positions. | Phone calls – Chapter Chair called 11 GRG Ex Com members re: group communication; Discussion held at LP Ex Com; Group Communication meeting set March 11 |
| Will turn leaders at level 1 into 2s and 2s into 3s through 2 upcoming events: 1) group leadership changes hands after November, 2) will plan technical training sessions (like winter camping); Orderly change in leadership | 2 new officers, 1 newsletter editor, 1 completed training session (snow camping - 20 people took class), 2 more training classes scheduled, Not much progress on 1 to 2 to 3 leaders, (Kelly Maas chair, Lisa Barboza vice chair) |
| Create a vision (more structure for the group) | Not particularly bounded, mission statement |

| Group Goals Workshop #3 | Group Goals Achieved Workshop #3 |
|--|---|
| Group Goal Workshop #3: Gather their share of hometown democracy signatures | 500+ signatures gathered; have begun coaching our members and receiving coaching from the chapter chair for Florida home town democracy, constructed half of a power point, created display for tabling; |
| Group Goal Workshop #3: To leverage our very successful hiking programs. We are a hiking Group, hiking is our strength, and we want to create a more diverse hiking program. Shorter and theme centered hikes to appeal to a broader group of members, and prospective members. And, to use this as a recruiting source for new leaders. More leaders for both outings and administrative positions. | created an event consisting of two hikes, a short and medium one that concluded at the same time with a conservation talk (wetlands); Four dedicated people created an event and coordinated the pieces to be successful - even if not a part of an established group |
| Group Goal Workshop #3A: Build strong excom & reach out to other 4 counties, other than Clark County - Intergration of all groups in Loo Wit (outings, political, programs) through a strong conservation program (Put together a 18 month conservation plan) | New Chapter Chair Cathy Morton; the Excom's capability to collaborate and coordinate has tangibly improved. the last two Excom meetings, there has definitely been a progression, in the organization, in the topics covered, in the preparation of each person before the meeting, and the quality of interaction. |
| Group Goal Workshop #3: Showings of "An Inconvenient Truth" increase visibility & recruit new members - • schedule 8 screenings between now and May meeting (May 18-20) at movie houses and colleges • recruit 40 new members • recruit 3 new people from each county to work on power plant campaign • ask people to take action at screenings • have prizes/drawings at events | Working on 1 showing of AIT; Some screenings of AIT but not organized by them; some recruitment 1-2 ppl/ county; also getting the city of tallahassee and madison county to shift their positions on the need for an energy center |
| Group Goal Workshop #3: Build the FLEXCOM team - purpose defined (1. Interview Group and issue chairs on ideas of FLEXCOM purpose, 2. FLEXCOM_remaining_9_members: get their ideas. Set up a phone call with them, 3. Write and circulate a draft of FLEXCOM's purpose) | Sent questions about what FI ExCom should be to group chairs and delegates; Received several good answers; We are focusing on the definition of our purpose We have been more of a team |
| :Compelling Direction & Interdependence | Getting more people engaged in the excom and getting a chair engaged - they achieved this by redesigning some of the tasks/roles so that they were more interesting. They have two more energetic people now, and the existing members are more energized |
| Develop a list of norms for the Southern group to operate under | came up with group norms |
| Better Define Leadership Positions and Roles: Build team work by better understanding each others roles, create more opportunities to involve others, more "rungs," spread the work load, rebalance the work. This will promote interdependence. Tactics: "Map" Leadership Roles; Ask (interview) leaders one on one to describe their roles and identify their interests; Use technical skills training to develop climbing leaders. | 1. Had series of meetings to redefine roles; 2. Contacted members and got feedback; 3. Created a list of current responsibilities and restructured them to fit a new set of leadership roles. 4. Put together three trainings |
| Work to have a more highly functioning team – about to go through an election cycle. 1) We are about to go through some change. We want to be more clear about our purpose – are going to work on this as a team. Try to make some decisions in the next two ExCom meetings – who are we serving, etc. And then delegate out responsibilities for talking with others about our purpose. We have some resources – strategic plan, etc. 2) Norms – initiate an e-mail thread about norms – Agendas, scribes, etc. And dedicating 10 minutes of each of the next meetings to working on that. Dave will facilitate this discussion along norms. 3) Knowledge of results – often don't know how well we are doing. | Great new additions to ExCom; Assigned mentors to meet with new ExCom members to orient them; Follow-up on budget and strategic plan.; New member orientation packet created; Participated in Step It Up Event; Worked on getting clarity on roles for Excom; Worked on norms – clarity of direction – strategic plan; Gov Gregoire – worked on Senate Bill 6001, delivered signatures to Governor. |
| To set a clear and consequential direction and establish NORMS - we feel the focus of the group should be local action addressing global warming. There is an opportunity to act immediately. We will call a meeting of the excom 3/27 (after our presentation on the Powwow to the County Council) at 7:00 pm. To get the rest of the excom on board and strategize. We will call the rest of the excom tomorrow 3/26 to get them all there. Ilse will present the report 3/27. Will put on agenda at excom meetings to formulate explicit norms, discuss problems, and set norms so people know what they are and that they are important. Then will take corrective action. At the next excom at which all members are going to attend we will hold a norms meeting and then pattern our behavior on our norms, calling attention to actions outside the norms and encouraging people to acknowledge mistakes. The norms meeting is 5/3/07. | Excom met 3/27 after the presentation on PowWow to co co. Strategized that evening on Trinity Green Dvlp. Are meeting June 20/21. Met to set up list of explicit norms at a meeting |

| Group Goals Workshop #3 | Group Goals Achieved Workshop #3 |
|---|--|
| <p>Showings of "An Inconvenient Truth" increase visibility & recruit new members - • schedule 8 screenings between now and May meeting (May 18-20) at movie houses and colleges</p> <ul style="list-style-type: none"> • recruit 40 new members • recruit 3 new people from each county to work on power plant campaign • ask people to take action at screenings • have prizes/drawings at events | <p>Working on 1 showing of AIT; Some screenings of AIT but not organized by them; some recruitment 1-2 ppl/ county; also getting the city of tallahassee and madison county to shift their positions on the need for an energy center</p> |
| <p>TDS Priorities: 1. Clear Direction; 2. Clear Boundaries; 3. Enabling Structure;</p> | <p>(1st step); Clarifying who was on the Core - Core group had a discussion. They have four clear sub-teams as well as the Core. They recruited Barbara Leonard to head one team; Process for orienting new people - At the last core meeting, only 3 people, all public education folks. Only one team. At general Sierra Club meeting, there was a presentation given by all teams (interdependent). They have a new norm – to orient new people.</p> |
| <p>Highest Priority: Enabling Structure; Priority: Hold Regular Meetings of the Fundraising Committee; Schedule a meeting to clarify the roles, responsibility and goals of the team, and define the team membership.</p> | <p>Did send thank you notes, recruited new members; Did not hold meeting, decided to postpone</p> |
| <p>Norms: 1. At the April 3 excom meeting, set up a norms task force. Invite excom members who weren't here. (Dexter will chair) 2. Task Force will provide a preliminary report at the May meeting. 3. Final report and adoption at June meeting; Clear Direction: 1. 1-on-1 conversations about existing vague goals with various participants (Dexter and John, prior to May 22 conscomm meeting) 2. Group conversation about new priorities at conscomm meeting 3. Finalize new priorities at June excom meeting (John) 4. Devote 1/2 time of all future excom meetings to these priorities; Interdependence: 1. Norma will talk to Greg Casini on April 1 or 2 about effective excoms 2. At the April 3rd excom meeting, set up an ad hoc committee to work on developing a more interdependent excom (3-4 members, 1-2 who weren't here this weekend) 3. Interim report back at May excom meeting 4. Final adoption at July excom meeting</p> | <p>Norms have been written up; haven't been adopted. Group conversation on priorities happened, but wasn't great</p> |
| <p>Develop the Central Florida ExCom group and its committee chairs into an interdependent team</p> | <p>The ExCom discussed working more interdependently; enlisted a volunteer coordinator who set up a good task list (from the contributions of the different committees) and has engaged at least 10 volunteers</p> |
| <p>Priority One: Clear Direction; Priority Two: Interdependence; Priority Three: Norms</p> | <p>Goals Achieved Workshop #3 Two one hour ExCom sessions on Goals and Norms. Draft mission statement. Large Group meeting calendar online. Considering membership meetings for whole Chapter. Hikes with BMG.</p> |
| <p>Group Goal Workshop #3: Get commitments from various policymakers to help put pre-emptive fertilizer legislation in place.</p> | <p>Got enough support to put legislation in place</p> |
| <p>Group Goal Workshop #3: Integrate political & legislative activities in order to be more effective/ better reach our global warming goals</p> | <p>Scott Otterson and Peter Orth did talk to several Excom members, it was supposed to be on the agenda for the next meeting, and it did get on the agenda, but it did not get voted on, so it is in process, and it is almost done - the legislative session started up, but we didn't finished it.</p> |
| <p>Group Goal Workshop #3: Outcome: By Feb. '08 get 600,000 petitions signed for Hometown Democracy. Specify later the # goal for each of these 3 Sierra Group areas; Tactics: Develop a story that will convince and inspire people in your local area to sign petitions. Create a photo documentary showing negative aspects of development, before and after, local places, images overpower words. Use existing local media contacts (radio, newspaper, TV web) to tell story and gain support for petition signing.</p> | <p>Tampa Tribune printed letter to the editor on Hometown Democracy, and the opposition felt threatened enough to respond with their own letter. Excom members are taking ownership of the Hometown Democracy campaign. The group has collected petition signatures at tabling events, and each tabler is telling their own story of why Hometown Democrat matters.</p> |

| Group Goal Workshop #4 |
|---|
| Follow new format for meeting agendas (i.e. the grid) |
| Agenda will be changed to reflect the most important work |
| Have a project for our team to work on - pick one and implement it |
| Adopt new agenda format by next ExCom meeting. |
| 1. Major victory on coal/energy |
| Ratcheting up work in Washington State (Thriving conservation committee – 2 priority campaigns) |
| 2. Global warming → complete Boyer >>Green: Activities - Do a Kids project in the schools "what does the environment look like" |
| Execute the (plans) - Hikes we've got on the drawing board |

| Group Goal Workshop #4 |
|--|
| Structure – >Increase Active Members >>>from 13-20 (+7); Increase outing participation; Increase non political activities: picnics, movies, potlucks; Increase turnout at monthly meetings; Include business info at monthly meetings; Maintain contact/build communication with PowWow attendees |
| Get majority of environmentally strong City Council members on X number of Pinellas County City Councils. Have a total of 25 strong group leaders. Activate X number of community members around environmental issues. |
| Define and design a measurable goal for a cohesive team with benchmarks. |
| Two great organizational or campaign plans with follow-through |
| Determine what this group (formerly Black Mt.) relationship to the chapter will be. |
| To improve interaction and alignment with Cascade Chapter |
| Activate members and add 3 new members, 1 with fundraising experience. |
| Have a social event once a month |
| Enlarge Conservation Committee and empower the chair as more of a manager |
| Bring LDP learning to the rest of FLEXCOM by modeling, explaining and changing and bringing delegates on board. |
| To continue outreach/involve Loo Wit membership; |
| Organize 3 events to increase the number of regular Mt. Baker group participants |
| Core Group: how to consistently engage wider interested community (social activity) |
| Only 2 people capable of presentations to groups. Need someone to do this job and need to invest in equipment for the presentations |
| Complete Web project to facilitate outreach and communication with members and the public |
| Develop better communication with the Chapter |
| 1. Identified team leader for each of 4 sub teams - Teams operate with more independence; 2. Keep working norms for meetings; 3. More specific commitments and accountability – team norms... *Rotate Facilitation / Take Lead at Mtgs* 4. Find Mtg agenda and format – commitments and accountability |
| Use LDP skills to set a strategic planning framework for the remainder of 2007 that includes goals, outcomes, dates and responsibilities. |
| No more LDP-PCS separation by 6 months: Support needed - buy in of pc membership- the individual contributions of these four members will use one on ones' to reach other Peak Climbers; 2. These four will train the peak Climbers steering committee. and the next years steering committee; 3. Expand the active PCS members by 10-20 people. This will require the support of the new offices, Publicity, Socials, Training and Mountaineering Committee - All four of the LDP PCG will help new steering committee expand and take over. Charles, a present member, is the chair of the Mountaineering Group. |
| Excom as a real team - address current stumbling blocks |
| Bring LDP skills and concepts back to the other Central Florida leaders through one-on-one and small group meetings. 3. Adopt new agenda format by next ExCom meeting. |
| Bring leadership development skills to others, Trickle down, Create program for getting info out -- training and mentoring, 4/5 committees and groups... 10/12 using skill coaches, It begins with retreat – face to face to continue learning... |
| Recruit 3 new active ExCom members |
| Refine the proposal we have to restructure the political and legislative committee and get that passed in the Excom shortly for the next political season |
| Flesh out structure and continue on the work that we have done on team and task design so that the team works more effectively |
| Make meetings more effective - By 3rd meeting of Excom >> measure "more effective" by following metrics... start meetings on time, action items reviewed/completed, there is a defined shared purpose, survey/ checklist, plus/delta review - are our meetings more effective? |
| To use LDP coaching skills to build group capacity |
| Finding people to fill 3 key leadership positions: political chair, volunteer coordinator, program chair |
| Define the goals and purposes of each Chair position (i.e. excom, program, conservation ,etc) |
| Reform excom process – taking skills back home |
| 1. Evaluate successful activities for criteria of success; 2. More fun activities using criteria for success; 3. Create our own reality (hype successes) in next newsletter |
| Hold a political training for the new and current members |
| Share LDP practices with group |
| Follow new format for meeting agendas (i.e. the grid) |
| Targeted leadership skills for group leaders |
| ExCom focuses work on shared purpose |
| Contact and energize our committee members who haven't been active in a long time - share our team purpose with them and to create a bounded and effective team |
| Reinforce working as a team - Team design coaches activate |
| 1. Team Leaders become coaches in a skill area; 2. Review materials and have confidence to be a team leader and try it out. |
| Structure – >Increase excom's ability to work as a team... incorporation LDP, Meeting ratings; |
| Develop "our story" for use in all communication. Each excom member and committee chair should develop their story. |
| Institute norms for every meeting |
| Develop and teach Group's Sierra story |
| Continued intentionality on leadership development program |
| Task design for Public Ed. Facilitation Team [Strengthen capacity of team leaders] |
| To have more efficient meetings |
| - More accountability for action items |
| Fund a new FR chair with time to do the work |

Appendix I: Comparison of Quality of Teams for Three Kinds of Work Teams

| | Sierra Club ExComs (n=25) | Public Sector Analytic (n=26) | Senior Management (n=78) |
|------------------------------|---------------------------------|-------------------------------------|--------------------------------|
| Real Team | 3.75 | 4.10 | 4.11* |
| Bounded | 3.91 | 4.50 | 4.51 |
| Interdependent | 3.64 | 4.09 | 4.02 |
| Stable | 3.71 | 3.71 | 3.80 |
| Compelling Direction | 3.48 | 3.84 | 3.99 |
| Clarity | 3.28 | 3.99 | 3.64 |
| Challenge | 3.23 | 3.09 | 3.83 |
| Consequentiality | 3.95 | 4.45 | 4.50 |
| Enabling Structure | 3.63 | 3.78 | 3.67 |
| Team Composition | 3.47 | 3.70 | 3.83 |
| Task Design | 3.89 | 4.00 | 3.82 |
| Group Norms | 3.49 | 3.65 | 3.36 |
| Supportive Context | 3.11 | 3.32 | 3.41 |
| Rewards/Recognition | 3.38 | 3.53 | 3.73 |
| Information | 3.13 | 3.25 | 3.43 |
| Education | 3.03 | 3.43 | 3.48 |
| Resources | 2.88 | 3.08 | 3.02 |
| Coaching availability | 2.98 | 3.08 | 3.06 |
| Process Criteria | 3.65 | 4.03 | 3.58 |
| Effort | 3.67 | 4.05 | 3.87 |
| Strategy | 3.52 | 4.10 | 3.44 |
| Knowledge and Skill | 3.82 | 3.93 | 3.43 |
| Team Social Processes | | | |
| Quality of Interaction | 4.09 | 4.06 | 3.79 |
| Relationship Satisfaction | 4.04 | 4.16 | 3.87 |
| Individual Well-being | | | |
| Internal Work Motivation | 3.97 | 4.14 | 4.23 |
| Growth Satisfaction | 4.10 | 4.14 | 3.84 |
| General Satisfaction | 3.91 | 4.18 | 3.91 |

* With the exception of Stable, Group Norms, Coaching Availability, and Quality of Interaction, these are all statistically significant differences at $p < .01$. In no case were the Sierra Club teams scoring highest of the three types of teams compared here.

Appendix J: Organizational Capacity Created by the LDP - Teaching Materials on CD

Workshop 1:

Trainers Materials

- Trainers Launch Manual
- Power Point Presentation
- Charts Addendum

Participants Materials

- Readings
- Journal Handout

Workshop 2:

Trainers Materials

- Trainers Module Guide
- Facilitators Guide
- Trainers Training Guide
- Power Point Presentation

Participants Materials

- Agenda
- Syllabus
- Charts
- Readings
- Exercises

Workshop 3:

Trainers Materials

- Trainers Module Guide
- Facilitators Guide

Participants Materials

- Participants Guide
- Readings

Workshop 4:

Trainers plus Participants Guide (all)

Trainers Materials

- Trainers Guide All
- Trainers Module Guide
- Facilitators Guide
- Trainers Coaching Sessions Guide

Participant Materials

- Participants Coaching Sessions Guide

Appendix K: Organizational Capacity Created by the LDP – List of Trainers

| | |
|--|---|
| Barrows, Jon Training and Event Coordinator Sierra Student Coalition Washington, DC | Bettinger, Robert L. San Diego, CA |
| Bianchi, Bill Chicago, IL | Casini, Greg Associate Director of Volunteer Development San Francisco, CA |
| Chin, Allison | Evans, Lisa Field Administrative Coordinator Birmingham, AL |
| Hunter, Rod East Bend, NC | Imlay, Laurel Chapter Coordinator, Maryland Chapter College Park, MD |
| Karpf, Dave Sierra Student Coalition | LeFever, Susan* Director, Rocky Mountain Chapter Denver, CO |
| Merrow, Sue | Miller, Jono Sarasota FL |
| Morris, Julie | Muhly, Dave* Regional Manager, Sierra Club Appalachian Region Bland, VA |
| Pallatto, Liz* Training Specialist San Francisco, CA | Price, Bill Sierra Club EJ Resource Coordinator, Central Appalachia Charleston, WV |
| Reitan, Julia Director, Office of Volunteer & Activist Services San Francisco, CA | Shively, Paul Senior Regional Representative Portland, OR |
| Wood, Maura | Wiley, Joan* Training Governance Committee Co-Chair Annapolis, MD |
| Winchester, Joanna | Yarbray, Kim |

*Designates Lead Trainers

Appendix L: Team Coaching Expertise Acquired by Workshop Participants

| Site | One on One | Story | Strategy | Task Design | Team Design |
|-------------|----------------|------------------|-----------------|------------------------------|-------------------|
| Cascade | Becky Stanley | Sara Patton | Dave Porter | Tina Schulstad Margie Van | Mike O'Brien |
| Cascade | Jessica Eagle | Alice Linker | Trevor Kaul | Cleve | Tristan Brown |
| Cascade | Brian Wolfe | | Mike Torres | Linda Wolfe | Cathy Morton |
| Cascade | Brian | | | | |
| Cascade | Grunkemeyer | | Rebecca Phelps | | Brady Montz |
| Cascade | Lynn Doremus | | | | Stan Moffatt |
| Cascade | | | | | |
| Florida | Linda Bremer | Cecilia Height | Susie Caplowe | Ed Gartner | Sue Peters-Ferree |
| Florida | John Koch | Joy Towles-Ezell | Mark Oncavage | Mary-Slater-Linn | Andrea Canelos |
| Florida | | Barbara Curtis | John Glenn | Karen Kempf | Betsy Roberts |
| Florida | | | Marjorie Holt | Ben Fusaro | Karen Kempf |
| Florida | | | | | Bev Griffith |
| Florida | | | | | |
| Loma Prieta | Marj Ottenburg | Kurt Newick | Gary Bailey | Suzanne Lowd | Charles Schafer |
| Loma Prieta | Ginny Laible | | Merrill Bobele | Bruce Rienzo | Shawn Britton |
| Loma Prieta | Bonnie McClure | | Rob Rennie | | |
| Loma Prieta | Joe Schmidt | | | | |
| Loma Prieta | Tom Driscoll | | | | |
| Loma Prieta | Joe Cernac | | | | |
| Rio Grande | Ilse Bleck | Shrayas Jatkar | Dexter Coolidge | Mary Westerlund | Eva Thaddeus |
| Rio Grande | Brian Skeelee | Jody Benson | Robb Thomson | Dave Gemeinhart | Mark Jones |
| Rio Grande | | | | Richard | |
| Rio Grande | Sig Silber | John Buchser | Lawson Legate | Provencio | Norma McCallum |
| Rio Grande | Alice Cox | Ken Hughes | | Susan Martin | Dan Lorimier |
| Rio Grande | | Margot Wilson | | John Waugh | Lou McCall |
| Rio Grande | | Richard Kristen | | | |