LEADERSHIP
DEVELOPMENT
PROJECT

"NPLA in Action"

TRAINERS' MANUAL

Florida Launch
June, 2006

Prepared for Sierra Club Trainers in the
Leadership Development Project

Table of Contents

Section 1: INTRODUCTION TO THE LEADERSHIP DEVELOPMENT PROJECT (LDP)

In this section, you will read about the background of the Leadership Development Project (LDP) and your role as a trainer. You will also find the letter of invitation to Sierra Club participants sent in May 2006.

WHAT IS THE LEADERSHIP DEVELOPMENT PROJECT (LDP)?

Background

The findings of the National Purpose, Local Action (NPLA) research project, which many of you are familiar with, identified key opportunities for enhancing Group and Chapter ExCom effectiveness. These opportunities centered on building greater internal organizational capacity, a key element of which is leadership. We define leadership broadly as enabling others to achieve shared purpose in the face of uncertainty.

Examining leaders' individual skills, motivation, and behavior, NPLA findings identified the key role of values in motivating learning; the need to acquire skills of self-management, task management and managing others; the need to develop leaders able to recruit and retain volunteers and new leaders; and the need to improve deliberative and implementation skills of ExComs as a whole.

The Leadership Development Project grew out of the NPLA study and is a pilot project. Not only will this pilot project serve as a model for developing a leadership program across the entire Sierra Club organization, but it will also create a "laboratory" for learning more about leadership development in general. Put another way, our goal is to work together to learn how to achieve the desired leadership and teamwork outcomes for SC, to create the organizational capacity to diffuse what is learned across the entire organization, and to contribute new knowledge about leadership development to the broader research and academic communities.

Your role as a Trainer

Your responsibility as a trainer is work with your colleagues to make this project successful. This requires participating in a training session for each workshop, facilitating group sessions, coaching, and providing feedback to help develop the most effective program that we can. Investing in the new leadership capacity at the state and local level of the Sierra Club is a major challenge. It will only happen with your continued commitment, energy, and imagination.

The pilot project involves the ExComs of 4 chapters, each with about 5 groups. Chapters were selected based on the number of Groups they could commit to participate, their commitment to the project, and the extent to which they offered a valuable context for learning lessons that could be of use to the entire organization. This pilot project will enable us to learn which pedagogies work, which ones do not, and under what conditions some work better than others.

Our work together begins with "training the trainers." This manual will help you understand the framework of the leadership development program and give you useful, concrete tips on how to train and coach your fellow SC members and facilitate your workshops. As we go along, moving from one workshop to another, we will add more chapters to this manual. Right now, we have information on the Launch workshop for Loma Prieta. This launch workshop will be used at all four chapters. After the launch, we will be sending you relevant training information for each subsequent workshop. Please keep this manual handy, so that you may add to it, and may refer to it as needed over the course of the LDP.

Should you have any questions during the course of this project, feel free to contact the Harvard Research Team, whose information is located at the very end of this manual. We are looking forward to working closely with you in this endeavor and thank you for volunteering your time and energy!

LETTER OF INVITATION TO SIERRA CLUB PARTICIPANTS MAY 2006

Dear Sierra Club Leader,

Thank you for volunteering to participate in the Sierra Club Leadership Development Project (LDP). In this letter we introduce the Research Team responsible for creating the curriculum in collaboration with Sierra Club trainers. We describe what you can expect from the project, what commitment you have been asked to make, and what you can expect of us.

About the Research Team

We are very enthusiastic about the work the Harvard Research Team will be doing with us in this project. They include Marshall Ganz, Hahrie Han, Erin Lehman, Adam Reich, and Ruth Wageman. They share a personal interest in using their experience and skills to build leadership capacity within the Sierra Club. They love teaching, are committed to developing citizen-leadership, and bring a diverse and complementary set of capabilities to this work. You can read more about their backgrounds, interests, and expertise in the short biographies that are attached to this letter.

Here's what your commitments will be as participants in the Project

Workshops. There will be five workshops in the Project. The launch workshop of two and a half days will be followed by four workshops—one every two months. These workshops are organized as follows:

(1) A launch workshop: Introduces the framework for learning leadership based on relationship, motivation, strategy, and action. You will begin to build specific skills in each of these areas. You will also determine how best you can put these new skills to work developing leadership to support the ongoing work of your ExCom. 2.5 days
(2) Relationship and Motivation workshop: Focuses on building and sustaining effective relationships among members, leaders and with other constituencies, and focuses on building skills for creating and sustaining motivation and commitment. 2.5 days
(3) Deliberation workshop: Focuses on the practices of strategizing, identifying priorities, and making excellent individual and collective decisions. 1.5 days
(4) Implementation workshop: Focuses on the skills required for making things happen. 1.5 days
(5) Concluding workshop: Focuses on integrating lessons into an overall framework of leadership and planning for the future. 1.5 days

Teamwork. Because our goal is to develop *team-level* as well as individual leadership capabilities, you will participate in the project with your full team. As such, your attendance at every workshop is essential for your team's learning. As a team you will decide how to conduct leadership development work in support of your ongoing work--something you will work on both during and between the LDP workshops.

Journals. Between LDP workshops, you will keep an electronic daily journal in which you describe how you are putting these new skills to work in your Sierra Club activities. Questions you may choose to reflect on include: What opportunities did you find to practice new relational skills? What were you practicing? What worked for you? What was challenging, puzzling, or frustrating about it?

Questionnaires. Because this is an action-research project focused on continual learning about leadership and teamwork, you are asked to contribute to collecting information throughout the course of the project. We will ask you to complete questionnaires at LDP workshops and/or during the intervals between workshops. We will ask you about your own learning and leadership practices, as well as your observations of what others with whom you work have learned or are doing differently.

What you can expect of us

The workshops will operate in support of your ongoing Sierra Club work, rather than pulling you away from it. Attending workshops, completing questionnaires, and writing in journals are significant time commitments, but each activity is designed to provide usable lessons and opportunities to apply what you learn, enabling you to become more effective Sierra Club leaders.

Workshop content. Each workshop involves practicing skills together with other members of your team. You will leave each workshop better able to execute your responsibilities as a leadership team.

Project design. During the launch workshop we will help you define a leadership development project to address the critical leadership needs of your team.

Coaching support. We will provide to each individual participant a coach who will regularly read and comment on your journal entries, to help you reflect on what you are learning from your experience putting new skills to work.

Continual learning. We expect to learn, refine, adjust and collaborate in the work of teaching and designing ways for Sierra Club members to learn to exercise leadership more effectively. Expect us to bring all our skill, experience, and enthusiasm to bear on this, and that we will also to be open-minded, adaptive, and collaborative.

Next Steps

Expect to hear from us soon about trainers, and about materials and advance readings for the first workshop. Again, we are all very much looking forward to meeting you and to working together on the Leadership Development Project.

The Leadership Development Project Team

Sierra Club

Greg Casini (CO)	Dave Muhly (VA)	Julia Reitan (CA)
Rod Hunter (NC)	Emily McFarland (CA)	Sue Merrow (CT)
Frank Orem (OR)	Don Richardson (TN)	Eric Thompson (SC)
Kimberly Williams (NC)	Joan Willey (MD)	Jill Workman (OR)
Glen Besa (VA)		

Harvard Research Team

Marshall Ganz
Hahrie Hahn
Sarah Staley
Adam Reich
Ruth Wageman

Section 2: THE LAUNCH WORKSHOP

In this section, you will find the Launch Syllabus that has been provided to all participants. You will also find the Trainers' Launch Agenda that will guide our work together this weekend.

LAUNCH SYLLABUS

Florida Launch
June 23-25, 2006

LEADERSHIP
DEVELOPMENT
PROJECT

"NPLA in Action"

"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

INTRODUCTION

Building powerful social movements requires identifying recruiting and developing leadership, building community among these leaders, and building power from that community. Leaders create conditions that enable their constituents to achieve their goals in the face of uncertainty. They do so by mastering arts of collective action: relationships, motivation, strategy and action.

Working in ExCom teams over the course of two and a half days, participants will learn to build relationships to identify shared value and interests, to motivate one another to commit to acting on these interests, to devise strategy to turn their resources into the power to act effectively, and to take action. Using tools of reflective practice, they will "learn how to learn" from their own experience. We draw on social science, historical, and practical texts as well as the lived experience of participants.

We learn the practice of leadership development – like any practice – by doing it. We learn ride a bike only by risking falling, falling, and 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. Learning to lead – and to develop leaders - requires risking failure. Reflective practice creates the opportunity to turn failure into opportunities for learning.

Our work together this weekend will help you harvest your own lessons about leadership, allow you to learn from each other' experience and enhance your ability to lead. Please come with an exploratory frame of mind.

Training Session Objectives
1. Introduce Leadership Development Project. 2. Introduce framework for learning leadership. 3. Develop relational leadership skills. 4. Develop motivational leadership skills. 5. Develop skills of strategic deliberation. 6. Develop implementation skills. 7. Prepare for coaching in local leadership development project.

DAY 1: FRIDAY, 4:30 PM – 9:30 PM

SESSION #1: INTRODUCTION: Welcome
Friday, 4:30 PM – 6:30 PM

We get acquainted, learn why the Sierra Club is launching LDP, and how we will work together. "What is Organizing?" describes our learning framework. Thich Nhat Hahn counsels us on how to use frameworks wisely. And "Learning Practice" offers a brief overview of our pedagogy.

Session #1 Objectives
1. Introduce training session in the context of the overall project. 2. Introduce leadership learning framework. 3. Introduce participants. 4. Establish goals and norms.

1. Marshall Ganz, "What is Organizing?", 2006.

2. Thich Nhat Hanh, "The Raft is Not the Shore" *Thundering Silence: Sutra on Knowing the Better Way to Catch a Snake*, Berkeley, CA: Parallax Press, 1994, pp. 30-33.

3. Marshall Ganz, "Learning Practice", 2006.

4. Marshall Ganz, "Leadership", 2006.

4. Mike Gecan, *Going Public*, "Chapter 10, Three Public Cultures", pp.151-166.

Launch Workshop Questionnaires

Each participant in the launch workshop will complete two questionnaires. The "Participant: Individual Survey" asks for information about the individual participant and the other members of their ExCom who are participating in the LDP. The "Participant: ExCom Survey" asks for information about the ExCom as a whole. Please complete one by this Sunday and the other by a week from Sunday.

WELCOME DINNER, 6:30 PM – 7:30 PM

SESSION #2: BUILDING COMMUNITY: Relationships
Friday, 7:30 PM – 9:30 PM
We focus on weaving the threads together that constitute a movement, the relationships: how they work, why they matter, and how we create them. Gladwell shows how they become the social networks, also know as "social capital." Simmons shares one approach. **You will have the opportunity to form new relationships, discern common interests, recognize values on which they are based, and identify resources that can be mobilized on their behalf.**

Session #2 Objectives

1. Introduce framework for learning relationship building.
2. Learn to conduct a one on one meeting: initiate relationships, elicit shared values, discern interests, exchange resources, and obtain commitments.
3. Learn to move from individual "interests" and "resources" to team "interests" and "resources".
4. Learn peer evaluation and feedback.
5. Learn reflective debriefing of practice.

1. Malcolm Gladwell, "Six Degrees of Lois Weisberg," in *The New Yorker*, January 11, 1999, pp. 52-63. [10 pages]

2. Ian Simmons, "On One-to-Ones," in *The Next Steps of Organizing: Putting Theory into Action*, Sociology 91r Seminar, (pp. 12-15) 1998. (P)

3. Marshall Ganz, "Organizing Notes on Relationships", 2006.

DAY 2: SATURDAY, 9:00 AM – 8:30 PM

SESSION #3: WHAT'S AT STAKE: Values, Motivation, Narrative

Saturday, 9:00 AM to 12:15 PM

Motivating oneself and others to act demands confidence, commitment, courage, and hope – all of which, matters of the heart, are rooted in our values. We can motivate through the stories we tell, the ways we organize our work, and ways we interact with each other. Bruner explains the role of story and Shakespeare shows how Henry V transformed a familiar story of despair into one of hope, turning certain defeat into possible victory. **You will have the opportunity to tell your own public story and weave together a shared story of your ExCom, and its goals.**

Session #3 Objectives
1. Introduce framework for learning motivational narrative.
2. Learn to tell your own motivational public story.
3. Learn to tell a team story of hope.
4. Learn peer evaluation and feedback.
5. Learn reflective debriefing of practice

1. Jerome Bruner, Chapter 2: "Two Modes of Thought," *Actual Minds, Possible Worlds*, Cambridge: Harvard University Press, 1986, pp. 11-14. [4 pages]

2. William Shakespeare, *Henry V*, Act IV, Scene 3, “We Happy Few,” pp. 140 –149.

3. Marshall Ganz, Organizing Notes on Motivation, 2006.

LUNCH, 12:15 PM – 1:30 PM

SESSION #4: MOBILIZING POWER: Resource, Deliberation, Strategy
Saturday, 1:30 PM – 4:45 PM

We strategize to turn what we have (resources) into what we need (power) to get what we want (outcomes). In organizations we often devise strategy using deliberative process. Who strategizes, how they do it, and how committed they are key to devising good strategy The Book of Samuel shows how David’s resourcefulness overcame Goliath's resources. **You will have the opportunity to strategize how to turn your resources into power you need to achieve the outcome you want**.

Session #4 Objectives
1. Introduce framework for learning strategic deliberation.
2. Learn to use deliberative process to devise strategy.
3. Learn peer evaluation and feedback.
4. Learn reflective debriefing of practice.

1. Book of Samuel, Chapter 17, Verses 4-49. [3 pages]

2. Marshall Ganz, Organizing Notes on Strategy.

BREAK: 4:45 – 5:00 PM

SESSION #5: MAKING IT HAPPEN: Action
Saturday, 5:00 PM – 6:15 PM; Sunday, 8:30 AM – 1:30 PM

The best strategy in the world is useless unless it's effectively acted upon - mobilizing and deploying resources by securing commitments, delegating responsibility, establishing time lines, managing contingency, providing recognition, support, and accountability and getting outcomes. Acting takes courage. Kierkegaard tells us why. **You will have the opportunity to enact your strategy by asking others to commit their resources to your action plan.**

Session #5 Objectives
1. Introduce framework for organizing action. 2. Learn action skills: commitment, delegation, accountability, recognition, contingency, and outcomes. 3. Learn peer evaluation and feedback. 4. Learn debriefing practice.

1. M.S. Kierkegaard, "When the Knower Has to Apply Knowledge" from "Thoughts on Crucial Situations in Human Life", in *Parables of Kierkegaard*, T.C. Oden, Editor. New Jersey: Princeton University Press, 1989, pg. 38. [1 page]

2. Marshall Ganz, Organizing Notes on Action, 2006.

CELEBRATORY DINNER: 6:30 PM – 8:30 PM

DAY 3: SUNDAY, 8:30 AM – 4:00 PM

SESSION #5 (Continued): 8:30 AM – 12:00 PM

Taking Action: 8:30 AM – 11:00 AM

Action Debriefing: 11:00 AM – 11:30 AM

Overall Debriefing: 11:30 AM – 12:00 PM

LUNCH: 12:00 PM – 1:00 PM

SESSION #6: LEADERSHIP DEVELOPMENT PROJECT
Sunday, 1:00 PM – 3:30 PM

Now we reflect on what it takes to identify, recruit and develop more leadership competent in the practices with which you have just become acquainted. We focus first on the challenge of "letting others lead", the question Jethro addresses in the passage from Exodus. We then turn to how to determine your leadership needs, and finally how to begin developing a program to identify, recruit, and develop the people needed to fulfill those needs. We conclude with out next steps. Dr. King offers some reflections of leadership as service.

Session #6 Objectives

1. Learn how to assess Chapter and Group leadership needs.
2. Decide upon Chapter and Group leadership development activity.
3. Learn how journaling will work and coaching feedback provided.

1. The Bible, Exodus, Chapter 18.

2. Dr. M.L. King, "The Drum Major Instinct," *A Testament of Hope*, San Francisco: Harper Row, 1986, pp.259-67.

3. Marshall Ganz, "Leadership Development", 2006.

SESSION #7: CLOSING SESION
Sunday, 3:30 PM – 4:00 PM

We go over plans for the next workshop, conduct a final evaluation, and go on our way.

CLOSE OF LAUNCH WORKSHOP

TRAINERS' LAUNCH AGENDA
Sierra Club Leadership Development Project

Florida Launch
June 23-25, 2006

SESSION#1 (Friday, 4:30 PM – 6:30 PM): Welcome
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Session #1 Objectives

1. Introduce training session in the context of the overall project.
2. Introduce leadership learning framework.
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Session #1 Readings

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I. **WELCOME (15 min.) (4:30 – 4:45) (SC)**

   A. **Welcome (Local SC)**

   B. **Story of Project (Nat'l SC)**

   C. **Goals of Project (Nat'l SC)**

II. INTRODUCING THE WORKSHOP (25 min.) (4:45 – 5:50)

Thanks for the opportunity: revitalize leadership of sierra club, revitalize environmental movement, and revitalize people politics in America.

Inspiration in de Tocqueville, knowledge of how to combine: not customer, not client, but citizen; not product, not service, but voice.

A. Introducing the Participants: Goals (20 min.) (4:45 – 5:05)

Each person tells us who they are, where they are from, what position they hold, and a goal they hope the workshop can help them achieve. We post goals, synthesize, and refer back to them at the end of the workshop to see how we did.

B. Introducing the Trainers (10 min.) (5:05 – 5:15)

The trainers play a critical role in this project. Over the course of the next two days they will facilitate your teamwork. In this role, they will work with you to manage time, focus on the work, and complete assignments. You will find them to be sources both of support and of challenge. Over the course of the year, they will also serve as your "coaches", reading you journal entries, commenting, and offering feedback. Each trainer introduces him/herself with a brief story of why they decided to serve as a trainer.

C. Introducing the Research Team (35 min.) (5:15 – 5:50)

1. Researching Leadership (RW) (15 min.) (5:15 – 5:30)

Ruth tells her story about why she appreciates teaching and learning and how that led her to the LDP project. She will introduce the program, not only as a pilot project to serve as a model for developing a leadership program across the entire Sierra Club organization, but also as a "laboratory" for learning more about leadership development in general and a model that could serve as the benchmark for teaching leadership to other membership associations. Our goal is to work together to learn how to achieve the desired leadership and teamwork outcomes for SC, to create the organizational capacity to diffuse what is learned across the entire organization, and to contribute new knowledge about leadership development to the broader research and academic communities.

The pilot project involves the ExComs of 4 chapters (Loma Prieta, Rio Grande, Cascade, and Florida), each with about 5 groups. Chapters were selected based on the number of Groups they could commit to participate, their commitment to the project, and the extent to which they offered a valuable context for learning lessons that could be of use to the entire organization. This pilot project will enable us to learn which pedagogies work, which ones do not, and under what conditions some work better than others.

Workshops. There will be five workshops in the Project. The launch workshop of two and a half days will be followed by four workshops—one every two months. These workshops are organized as follows:

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b. Relationship and Motivation workshop: Focuses on building and sustaining effective relationships among members, leaders and with other constituencies, and focuses on building skills for creating and sustaining motivation and commitment. (2 days)
c. Deliberation workshop: Focuses on the practices of strategizing, identifying priorities, and making excellent individual and collective decisions. (2 days)
d. Implementation workshop: Focuses on the skills required for making things happen. (2 days)
e. Concluding workshop: Focuses on integrating lessons into an overall framework of leadership and planning for the future. (2 days)

Teamwork. Because our goal is to develop *team-level* as well as individual leadership capabilities, you will participate in the project with your full team. As such, your attendance at every workshop is essential for your team's learning. As a team you will decide how to conduct leadership development work in support of your ongoing work-- something you will work on both during and between the LDP workshops.

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Continual learning. We expect to learn, refine, adjust and collaborate in the work of teaching and designing ways for Sierra Club members to learn to exercise leadership more effectively. Expect us to bring all our skill, experience, and enthusiasm to bear on this, and that we will also to be open-minded, adaptive, and collaborative.

2. **Leadership as Organizing (MG) (15 min.) (5:30 – 5:45)**

   As Marshall tells his story, he uses examples drawn from the civil rights and farm workers movements to explain *the organizing framework*: identifying, recruiting, and developing leadership, building community around that leadership, and building power from the resources of that community.

To show the importance of "looking for the power", he argues that dealing with inequalities in housing, education, criminal justice, etc. as isolated problems would have solved little because they are only symptoms of a deeper power inequality: political (no right to vote), economic (dependent on low wage work, no capital access), and cultural (example of day to day oppression at work, e.g., black man who offers his seat).

To show where to "find" the power, in resources of a community with an interest in change, he uses the Montgomery bus boycott, and the way the individual resource of "bus fare", what had been empowering the bus company, became, when used collectively, a source of power, empowering the community.

To show the role of leadership – in particular leadership development – he explains the role of the Black Church as a "leadership school" training pastors who had to organize their own congregations, missionary societies, boards of deacons, etc. Role of leaders enabling others to achieve purpose in the face of uncertainty.

He then recounts how the farm workers experience, including Mississippi eyes, teaches the same points about leadership, community, and power.

The framework was developed in classes taught at Harvard after he returned there, along with the understanding of the role of social movement organizations in making social change in America.

The Framework:

a. Leadership: enabling others to achieve purpose in the face of uncertainty.
b. Organization Building: leadership, community, and power.
c. Civic association engages others as "citizens", seeking "voice"; not "clients" receiving services of a bureaucracy; nor "customers" marketed to by a firm (Gecan reading).

3. **Learning to Lead (5 min.) (5:45 – 5:50)**

We explain the pedagogy of reflective practice: like learning to ride a bike, get into action, find the courage to risk failing because it's the only way to learn. The head, hands, and heart all learn. The Thich Naht Hanh reading shows what a "learning framework" is, how to use it, and how to let go of it when it inhibits learning.

III. WORKSHOP PROGRAM (35 min.) (5:50 – 6:25)

A. What Leaders Do (20 min.) (5:50 – 6:15)

People are asked how many have ever belonged to a disorganization. Most raise their hands. Tell story of asking people to think of their worst organizational experiences and coming up with this list. Go through all the features of a disorganization, giving some examples. Then contrast with people's memories of their best organizational experience. Go through the contrasting organizational features.

1. **Disorganization/Organization**

   a) Division/Community
   b) Passive/Participation
   c) Reactive/Initiative
   d) Inactive/Mobilized
   e) Drift/Purpose

   We then ask what makes the difference? MG tells a story about comparing boycott cities and finding that differences in the environment failed to explain why some were better than others. Finally figured out it was about leadership, specifically the pieces of work or kinds of functions leaders perform to enable the group to do its work.

2. **Leadership**

   a) Division to Community through *Relationship Building*.
   b) Passivity to Participation through *Motivation.*
   c) Reaction to Initiative through *Strategy.*
   d) Inactive to Mobilized through *Action.*
   e) Drift to Purpose through *Responsibility.*

3. **Leadership Development:**

   It's not enough for one person to learn these skills, however. The real key is in learning how to develop these skills in others.

   a) Leadership Poor organization: all the arrows point to the dot in the middle. It is an illusion of control, but one can never catch up.
   b) Leadership Rich organization: more like a snowflake, a leadership team with multiple dots sharing responsibility; less control, but more power.
   c) Letting others lead: have to be willing to create the opportunity for others to develop, as well as the support and the challenge. But takes courage,

letting go of control, trusting one can handle the mistakes of others as well as one's own. The Leadership Development Model.

B. **Workshop Agenda: what we will do (5 min.) (6:15 – 6:20)**

This sets the agenda for what we will do together over the next two days a kind of mini-campaign. The campaign chart grows out of Stephen Jay Gould's account of two different ways of looking at time: as a cycle and as an arrow. The cycle is the rhythm of continuity, the arrow, the rhythm of change. Change demands focused energy, just as will be the case in the next two days.

The members of each ExCom will begin by having relational meetings to discern an interest in leadership development that their ExCom shares. They will be asked to tell personal stories about why they are motivated to act on this interest and to strategize turning their resources into an outcome by reaching out to others. On Sunday morning they will be expected to conduct the outreach – the action – that they decided upon. People often feel quite anxious about this because it is new, may involve taking some risks, and may require going outside one's comfort zone. This is natural and the best way we can get through it is to acknowledge it, support one another, and come up with strategies to manage it. They will then evaluate their effort, reflecting on what they learned from the entire experience.

C. **Workshop Norms: how we will do it (10 min.) (6:20 – 6:30)**

We propose norms including the courage to speak up, support for those speaking up, starting and ending on time, etc.

Welcome Dinner: **6:30 PM – 7:30 PM**

SESSION #2: Building Community: Relationships (7:30 PM – 9:30 PM)

We focus on weaving the threads together that constitute a movement, the relationships: how they work, why they matter, and how we create them. Gladwell shows how they become the social networks, also know as "social capital." Simmons shares one approach. **You will have the opportunity to form new relationships, discern common interests, recognize values on which they are based, and identify resources that can be mobilized on their behalf.**

Session #2 Objectives
1. Introduce framework for learning relationship building.

2. Learn to conduct a one on one meeting: initiate relationships, elicit shared values, discern interests, exchange resources, and obtain commitments.
3. Learn to move from individual “interests” and “resources” to team “interests” and “resources”.
4. Learn peer evaluation and feedback.
5. Learn reflective debriefing of practice.

Readings Session #2

1. Malcolm Gladwell, "Six Degrees of Lois Weisberg," in *The New Yorker*, January 11, 1999, pp. 52-63. [10 pages]
2. Ian Simmons, “On One-to-Ones,” in *The Next Steps of Organizing: Putting Theory into Action*, Sociology 91r Seminar, (pp. 12-15) 1998. (P)
3. Marshall Ganz, “Organizing Notes on Relationships”, 2006.

I. RELATIONSHIPS (30 min.) (7:30 – 8:00) (MG)

How many people have ever had a relationship? What makes a relationship: commonality or difference? We’re going to look at how relationships work from three different perspectives.

A. WHAT ARE RELATIONSHIPS: Exchange, Commitment, Stories.

1. Relationships as Exchange

Exchange: We can think of relationships as exchanges of interests and resources. We all have interests, purposes we pursue, and resources, the means we use to pursue them. We enter into relationships with others if their resources can enable us pursue our own purposes and if our resources can enable them to pursue theirs. For example, what is your interest in attending this session? What resource do you expect to get from me? What is my interest in being here? What resources do you have that can serve my interests?

2. Relationships as Commitment

Commitment: But exchange doesn’t make a relationship. What else does it take? When you have coffee with someone, you have a nice exchange, and then you ask, “shall we get together again next week?” And the other person says no, then what do you have? What would it take to begin a relationship? The other person would have to pull out their calendar, along with you, and each of you commits another hour of your “precious time” to developing your relationship. It’s commitment, the choice to allocate your own resources, which gives a relationship life – a past and a future.

3. Relationship as Story

Story: What if you want to learn about a persons interests and resources and their values as well. How can you do that? Turn to the class and pick a student and ask, “Who are you?” The response is usually categorical: I’m a student, I’m a parent, I’m a woman, etc. That tells us something about what categories you’re part of, but “who are you?” More categories don’t help. What is it that makes each of us uniquely “us”? Our life journey, experiences, crises, and learning – in a word, our “story”. And, if you want to learn about a person’s values, ask about their choice points. Choice points reveal the values that guide our choices. Link own story with common interest in leadership development. A third way to see a relationship, then, is as the emergence of a new - shared - story.

B. **HOW RELATIONSHIPS WORK:**

1. **Relationships can redefine interests**

   a) Relationships facilitate development of new individual interests
   b) Relationships facilitate discovery/construction of common interests
   c) Relationships lead to an interest in the relationship itself! (social capital)

2. **Relationships can redefine resources**

   a) Individuals may gain access to each other’s resources
   b) Relationships facilitate the development of common resources
   c) Relationships create resources in the relationship itself! (social capital)

3. **Relationships can redefine identities (roles) - as people join new communities of identity and interest.**

C. **FORMING RELATIONSHIPS**

The following is one way to think about how we initiate relationships.

1. **Attention - how get attention: speak, eye contact, reference, etc.**

2. **Interest - think will be in other person’s interest: ask advice, valuable relationship**

3. **Exploration - (asking/answering) (story)**

4. **Exchange - (insight/support/recognition/action)**

5. **Commitment - what’s next. Pull out calendar and commit certain time in the future to the relationship.**

II. **MEETING ONE ON ONE (30 min.)**

A. **Preparation: the one on one meeting**

1. A one on one is: public, probing, purposeful, scheduled, commitment**.**

2. A one on one is not: private, prying, chit-chat, accident

B. **Practice (15 min.) (8:00 – 8:15)**

People pair off with the ExCom member they know least well to learn enough about each other's backgrounds that they ***can introduce them to their team and identity an interest they share in developing leadership within their local chapter or group*** on which they'd like to work over the next two days, and the resources that each could contribute.

Take 10 minutes to learn each other's stories. Use last 5 minutes to focus on finding a shared interest in leadership development.

C**.** **Debriefing (15 min.) (8:15-8:30)**

How did people do? How many found interests they could address with
Each other's resources? What are some examples?

How did it feel, what was stilted, what about authenticity (intentionality, transparency 2X2)

Did they come up with a shared interest in leadership development?

What did they learn about what worked, what didn't, and what could have?

What lessons do they draw from this about leadership and organizing in general?

III**. RELATIONSHIPS TO SHARED INTERESTS (60 min.) (8:30 – 9:30)**

A. **Instructions (5 min.) (8:30 –8:35)**

Meet in their teams for facilitated discussion. Each person will introduce their partner, indicate their resources, and report on their common interest in leadership development, The team will then decide on the common interest it will focus its work on over the next two days. They will then evaluate how they did.

B. **Team Work (40 min.) (8:35 – 9:15)**

Participants break into their ExCom teams for a facilitated session of 45 minutes.

The facilitator leads a review of the goals, agenda, selection of a note taker, a timekeeper, and establishment of norms. (5 min.) Pairs introduce each other to the group; reporting out interests and resources (skills, relationships, etc.) (10 min.) These are posted on butcher paper. The facilitator reviews the list, identifying pattern so as to sort out choices the group must make (15 min.) The facilitator leads the group in making a decision as to their focus interest. They must decide how to decide (consensus vs. voting), specifying criteria of a good choice, and making the choice (10 min.). They then evaluate how they did: they identify their key learning points, followed by pluses and deltas on their process (5 min.)

C. **Debriefing (15 min.) (9:15 – 9:30) (RW)**

Each ExCom reports out on the shared interest in leadership development on which it has decided to focus for the rest of the session, the resources they can devote to it.

What did they learn about the role of relationships in leadership and how to form them?

What did they learn about what worked well and what could have worked better?

(Trainer Check-in) (9:30 PM – 10:00 PM)

SESSION #3: WHAT'S AT STAKE: Values, Motivation, Narrative.
(Saturday, 9:00 AM – 12:15 PM)

Motivating oneself and others to act demands confidence, commitment, courage, and hope – all of which, matters of the heart, are rooted in our values. We can motivate through the stories we tell, the ways we organize our work, and ways we interact with each other. Bruner explains the role of story and Shakespeare shows how Henry V transformed a familiar story of despair into one of hope, turning certain defeat into possible victory. **You will have the opportunity to tell your own public story and weave together a shared story of your ExCom, and its goals.**

Session #3 Objectives

1. Introduce framework for learning motivational narrative.
2. Learn to tell your own motivational public story.
3. Learn to tell a team story of hope.
4. Learn peer evaluation and feedback.
5. Learn reflective debriefing of practice

Session #3 Readings

1. Jerome Bruner, Chapter 2: "Two Modes of Thought," *Actual Minds, Possible Worlds*, Cambridge: Harvard University Press, 1986, pp. 11-14. [4 pages
2. William Shakespeare, *Henry V*, Act IV, Scene 3, "We Happy Few," (pp. 140 –149)
3. Marshall Ganz, Organizing Notes on Motivation.

I. **Emotions, Motivation, and Story Telling (9:00 – 10:15) (MG)**

A. **Interpretation: Two Ways of Knowing (5 min.) (9:00 – 9:05)**

1. **Analytic, Logos, Predictability, Argument: How**

2. **Narrative, Pathos, Effect, Story: Why**

B. **From Despair to Hope: "We Happy Few", Henry V (10 min.) (9:05-9:15)**

1. **Set context:** 1415 battle of Agincourt, English outnumbered, Henry going from camp to camp all night, listening.

2. **Shakespeare,** not history; military metaphor, but situation of people in despair, will surely lose, if no hope**.**

C. **Motivation, Emotion, and Action: What can we learn from Henry V about motivation? (20 min.) (9:14-9:35)**

1. **How does Henry try to persuade his men**?

   An appeal to logic or an appeal to emotion? To which emotions does he appeal? Which emotions must he overcome? Where find courage? A dialogue of the heart. What does Henry NOT do - demonize the French.

2. **What is emotion?**

   a) Word source: emotion, motivation, motor – that which moves us.
   b) Affective information about the world: physiological, cognitive, action oriented; mapping of what's good, bad, neutral.
   c) How we experience "values": the value we place on things, behaviors, experienced emotionally – Nussbaum: values information (emotion) crucial for choice making; e.g., research on amygilla = not choice at all.

d) Emotions and reasoning: Marcus "sentimental citizen":
   (i) Surveillance System: anomaly = anxiety that focuses attention, become mindful, but can go to fear or to curiosity.
   (ii) Dispositional System: enthusiasm (hope) to depression (despair)
   (iii) Problem solving results very different.

3. **Challenging the "Belief Barriers":**

a) Inhibit Action: Fear, Apathy, Inertia, Self-Doubt, Isolation.
   (i) Fear: not only fear of harm; fear of failure, fear of standing out, etc.
   (ii) Apathy: having cared, been disappointed too much.
   (iii) Inertia: habit, mindlessness
   (iv) Self-Doubt: I'm not qualified, people of my class, race, gender, education not qualified, etc.
   (v) Isolation: standing out, not one to back you up.

b) Encourage Action: Hope, Anger, Urgency, YCMAD, Solidarity (love)
   (i) Hope: where do you get your hope? Other people? "Testimony", Small successes, faith tradition, history?
   (ii) Anger: not rage, but outrage; contradiction between world as it is and as it ought to be.
   (iii) Urgency: priority, deadlines, campaign rhythm.
   (iv) YCMAD: you can make a difference; training, accountability, recognition; story about canvassing for an election, but no one wanted to know the results.
   (v) Solidarity: community, love, support, in it together.

4. **Emotional "reframing":**

a) Transformed certain defeat into possible victory – but still took "longbows".
b) Didn't alter the "facts", but altered the meaning of the "facts", the values associated with them.
c) Never demonized the French, enhanced own men's worth.

D. **Story: What can we learn from Henry V about motivating? He is telling a story – about the future (20 min.) (9:35- 9:55)**

1. What a story is:

a) What a story isn't:

A "mission statement": the English army is an organization established to fight the French, preserve the honor of England, and uphold the values of manliness, godliness, and country.

A "credo": we believe that it is the duty of Englishmen to defend their country, bring honor to their families, and fight for their king – we're all in it together.

b) What a story is:

A story is not **something you tell**: stories communicate values by drawing us into the emotional experience of them.

In particular, stories communicate values critical to dealing with the unexpected, **values of agency.**

2. **How stories work: Plot, Character, Moral, Setting**

   a) Plot: unexpected, agency
      (i) Start out with goal, face crisis, learn to deal with crisis. Give an example of a sequence of events which is not a "plot".
      (ii) Agency – dealing with the unpredicted is how we learn to exercise agency, choice.
   b) Character: identification, empathy
      The mechanism through which stories move us is our empathetic identification with the character. Why you need to be in your story.
   c) Moral: lesson re action, action
      Lessons in action (how to act) (story with no point) (what we do reveals who we are) Values - these become values we live by, foundation of our moral understanding (how to act), of our IDENTITY
   d) Setting: teller, audience, etc.

3. **Story of Hope: Challenge, Why Us, Hope**

   a) Challenge: urgency, unexpected
   b) Why We Care: individual stories, community stories, cultural stories (values); anger, ycmad, solidarity
   c) Where's the Hope (hope, YCMAD)

E. **Telling Your Public Story (20 min) (9:55-10:15)**

Ask people to tell short personal stories about why they care about the common leadership development interest of their group. Group feedback on the extent to which it "worked", what could have made it work better, etc?

What's the challenge? Where's the hope? Be sure to make the connection.

BREAK (15 min.) (10:15 – 10:30)

II. **Telling a Shared Public Story (100 min.) (10:30 – 12:10)**

A. **Preparation (5 min.) (10:30 – 10:35) (MG)**

Review instruction, hand out assignment, and write on wall.

B. **Team Work (50 min.) (10:35 – 11:25)**

Facilitator leads ExCom members in round of story telling. Each person tells a personal story of no more than 2-3 minutes about why they care enough about the leadership development challenge their group faces to do something about it and why they hope they can succeed. To prepare for the work of identifying themes, the facilitator can make a chart with one column headed "challenge" and another headed "hope". Right after the story s/he can note the element of "challenge" and the element of "hope" in the story just heard. Then the group can evaluate how well it worked. (30 min.)

To arrive at common story, the facilitator can go back to the challenge/hope chart to enlist the group in identifying themes. As the themes are agreed on, the group can choose their "story teller" who will tell their "group story" to the large group. The group story may be a version of his or her own story, a composite, or another way of conveying the motivation of the whole group without losing the power of a first person account. They can start with their own story, turning it into a group story by identifying the theme, referencing other stories, for example. They must tell a story, not tell "about" the story. (15 min.)

They then evaluate how they did: they identify their key learning points, followed by pluses and deltas on their process (5 min.)

C. **Debriefing (45 min.) (11:25 – 12:15) (MG)**

Each story teller, tell their 2 minute story, followed by group evaluation.

What did we learn about motivation, about story telling?

What did we learn about the role of celebration? Example of the farm worker applause.

What did we learn about what worked and what needs to be improved?

(Trainer Check-in) (1:00 PM – 1:30 PM)

LUNCH
(12:15 – 1:30 PM)

SESSION #4: MOBILIZING POWER: Resources, Deliberation, Strategy (Saturday, 1:30 PM - 4:45 PM)

We strategize to turn what we have (resources) into what we need (power) to get what we want (outcomes). In organizations we often devise strategy using deliberative process. Who strategizes, how they do it, and their degree of commitment are key to devising good strategy The Book of Samuel shows how David's resourcefulness overcame Goliath's resources. **You will have the opportunity to strategize how to turn your resources into power you need to achieve the outcome you want**.

Session #4 Objectives

1. Introduce framework for learning strategic deliberation
2. Learn to use deliberative process to devise strategy.
3. Learn peer evaluation and feedback.
4. Learn reflective debriefing of practice.

Session #4 Readings

1. Book of Samuel, Chapter 17, Verses 4-49. [3 pages]
2. Marshall Ganz, Organizing Notes on Strategy.

I. **STRATEGY, RESOURCES, AND POWER (75 min.) (1:30 – 2:45) (MG)**

A. **What can we learn from David and Goliath about strategy? (15 min.) (1:30 – 1:45)**

1. **Role of commitment:** David responds to injustice, no "feasibility study" before committing**.**

2. **Using your own resources:** David's stones, not Goliath's sword. Golaith's arrogance, inability to think beyond the conventional, makes him vulnerable.

3. **Role of imagination, improvisation, adaptation**: David sees thru shepherd's eyes, outsider, makes imaginative leap**.**

B. **What is Strategy:** turning what you have into what you need to get what you want, turning resources into the power to achieve outcomes**. (5 min.)(1:45 – 1:50)**

1. **Strategos on the hill, taktikas on the plane:** overview of the context, mastery of the specifics.

2. **Strategy is something you "do", not something you "have":** it is a verb, not a noun. It is a way of imagining, choosing actions (tactics) that link resources to outcomes, like a chain links beads on a necklace, not a bigger bead. Strategic action: mindful, clear goals, flexible means.

2. **Strategic elements:** resources, outcomes, opportunities, constraints – outcomes = how the world will be different as a result of your effort: specific, clear, "milk and honey".

C. **How Strategy can turn Resources into Power (15 min.) (1:50 -2:05)**

1. **Power is a relationship, not a thing:** it is the capacity to influence others created by the interplay of resources and interests. If my interest in your resources exceeds your interest in mine (dependency), this can give you "power over" me. If our interest in each other's resources is roughly equivalent, we may be able to create more "power with" (capacity) each other, than alone.

2. **Two kinds of power: power <u>with</u> (collaborative) and power <u>over</u> (claims making).** Car pool during bus boycott example of using "power with" to challenge, "power over" (boycott itself).

3. **Four Questions To Track down the Power:**

   a) What are my constituency's interests?
   b) Who holds the resources to address those interests?
   c) What are their interests?

d) What resources does my constituency have that can influence those interests?

4. **Strategy**: using resources to "move the fulcrum", to get more leverage out of resource that we have, rather than adding to the resources. Street smarts are a form of strategy**.**

D. **Elements of Strategy/Modeling: (10 min.) (2:05 – 2:30)**

Introduce brainstorming as way of generating fresh ideas, avoid self-censorship, and avoid evaluation. Crazy ideas chart can be helpful (bunny story)

1. **Resources (people vs. money, reason for "outreach", what is a "resource"?**

2. **Outcomes (how the world will look different): significant and the achievable.** Start with ldp outcomes for the next year, move to outcomes for the next day.

3. **Targeting (choice, focus, commitment, risk**): strategic engagement in organization's purposes vs. reacting to "what people want to **do".**

4. **Timing (opportunity):** al nopal no se viene a ver, solo cuando tiene tuna.

5. **Tactics (activities):** bunny story

E. **How We Strategize (15 min.) (2:30-2:45)**

1. **Deliberative Process:** generating ideas, synthesizing ideas, evaluating ideas, making decisions, goal setting, etc.

2. **Tension between the practical and the significant!** Don't start with the practical, encourage crazy ideas.

3. **Encouraging participation:** avoid self-censorship, making a safe-space, etc.

4. **Building strategic capacity:** motivation, resources, creativity (UFW reading on march to Sacramento)

BREAK **(2:45 – 3:00)**

II. **DEVISING STRATEGY (75 min.) (3:00 – 4:45) (MG)**

A. **Preparation (10 min.) (3:00 – 3:10)**

The goal of the session is to devise strategy that can move them toward their long-term goal, but taking action reaching out to others in the next two days. The outcomes are "short-term", but, hopefully, will contribute to "longer term" outcomes. Discuss how to manage anxiety that goes with issues of novelty and risk. The peak mountain group: clear purpose, strong relationships, and strategy to deal with fear. Managing the balance between the significant and the practical; start by uncensored brainstorming, including crazy ideas.

B. **Team Work (60 min.) (3:10 – 4:10)**

The facilitator leads the group in devising strategy to act on their shared leadership development interest by using their resources to reach out to others to produce a short-term outcome. Create the space for brainstorming before narrowing, identifying the tension between significance and practicality. (5)

Brainstorming begins by asking the question, given their shared interest, what are their resources? What kind of outcome might they achieve by reaching out to others by the next day that can get them on their way? Whom can they target? Are there timing considerations? And what tactics should they use and why? (15 min.)

Once the range of questions has been brainstormed, the facilitator leads the group through a process of synthesizing, looking for common threads, etc. (20 min.)

The facilitator then leads the group through a decision making process, based on criteria that they believe could guide their choice, deciding on a Plan A and Plan B. (15 min.)

They then evaluate how they did: they identify their key learning points, followed by pluses and deltas on their process (5 min.)

C. **Debriefing (35 min.) (4:10 – 4:45) (RW)**

Each ExComs "strategist" reports out on the Plan A and Plan B that they devised to act on their shared interest; why they made the choice they did.

What did they learn about strategy?

What worked well? What could be improved?

BREAK **(4:45 – 5:00 PM)**

SESSION #5: ACTION: MAKING IT HAPPEN: (Saturday, 5:00 PM – 6:15 PM) (Sunday, 9:00 AM – 1:30 PM)

The best strategy in the world is useless unless it's effectively acted upon by securing the commitments that enable the mobilization and deployment of resources, delegating responsibility, establishing time lines, managing contingency, providing recognition, support, and accountability and getting outcomes. Almost any action requires courage. Kierkegaard tells us why. **You will have the opportunity to enact your strategy by asking others to commit their resources to your action plan.**

Session #5 Objectives

1. Introduce framework for organizing action.
2. Learn action skills: commitment, delegation, accountability, recognition, contingency, and outcomes.
3. Learn peer evaluation and feedback.
4. Learn debriefing practice.

Session #5 Readings

1. M.S. Kierkegaard, "When the Knower Has to Apply Knowledge" from "Thoughts on Crucial Situations in Human Life", in *Parables of Kierkegaard*, T.C. Odem, Editor. New Jersey: Princeton University Press, 1989, pg. 38. [1 page]
2. Marshall Ganz, Organizing Notes on Action, 2006.

I. **DESIGNING ACTION (30 min.) (5:00 – 5:30)**

A. **Where's the Action? (15 min.) (5:00 – 5:15) (MG)**

1. **Mobilizing Resources, Deploying Resources, or Both?** Organizing logic vs. business logic: more people better (asset) not fewer (cost**).**

2. **Collaboration, Claims Making or Both?**

B. **Crafting Action (5 Questions) (15 min.) (5:15-5:30) (MG)**

Ask for a volunteer to read the Kierkegaard quotation about action.

Contrast "we've done that" about house meeting with story of the **Dean house meeting campaig**n, illustrating each of the below points.

1. **Outcomes:** what are your specific measurable outcomes?

2. **Commitments:** how you will get commitments? The difference between "I'll try" and "I will". Consistency theory.

The difference between a relational phone call and amobilizing phone call: call in two masters of the trade, whow how they are4 diferent, what we're missing is us.

Do a broken vase simulation to show that the problem is not me, but somethone else.

3. **Time:** what's the schedule, the deadlines?

4. **Contingency:** how can you reduce it to a minimum, but detect it, and adapt to it?

   5. **Coordination**: how will you handle coaching, accountability, and recognition. Accountability from volunteers**?**

II. **GETTING ORGANIZED (50 min.) (5:30 – 6:20)**

A. **Preparation (5 min.) (5:30-5:35)**

B. **Action Planning (30 min.) (5:35-6:05)**

Each ExCom is to turn its strategy into action. Facilitators will lead them in crafting an action plan based on the above "check-list": whom will they ask for commitments, how will they get them, who is responsible for what, what's their accountability mechanism, how will they measure success, how will they minimize contingency, how will they adapt to it? Each team will select on of its members to role play the "ask' for commitment that they will be making as part of their action. Encourage connecting back to the story.

C. **Report Out (15 min) (6:05 – 6:20) (MG)**

Each action coordinator will role-play asking for commitments followed by group evaluation and feedback.

CELEBRATORY DINNER (6:20 PM – 8:30 PM)

(Trainer Check-in) (8:30 PM – 9:00 PM)

TAKING ACTION (SUNDAY, 8:30 AM – 12:00 PM)

Your first survey is due at Breakfast

(Trainer Check-in) (8:00 AM – 8:30 AM)

SESSION #5 (Continued): (Sunday, (8:30 AM – 12:00 PM)

I. **TAKING ACTION (2.5 hours) (8:30 – 11:00)**

All participants check-in at 8:30 AM, briefly describe their action plan. They have until 11:00 AM to carry it out.

II. **ACTION DEBRIEFING (30 min.) (11:00 – 11:30)**

Each ExCom reports on the results of their "action", including numbers and their best story.

We then go back through and debrief what was learned about action

What worked well, what would you change?

III. **OVERALL DEBRIEFING (30 min.) (11:30 – 12:00) (RW, MG)**

Reflecting back on the entire workshop so far, beginning with the introduction on Friday night, the work on relationships, the work on motivation, strategy, and action on Saturday, and the action component today, what connections do you make across all four sessions? How does each element interact with each other element? What are some examples? What surprised you? What did you struggle with? Where do you think the most work remains to be done?

LUNCH **(12:00 PM – 1:00 PM)**

SESSION #6: LEADERSHIP DEVELOPMENT PROJECT
(Sunday, 1:00 PM – 2:30 PM)

Now we reflect on what it takes to identify, recruit and develop more leadership competent in the practices with which you have just become acquainted. We focus first on the challenge of "letting others lead", the question Jethro addresses in the passage from Exodus. We discuss a "developmental approach" to meeting your own leadership need and designing work so it can develop the capacity to meet those needs. We look at the links among identifying, recruiting, and developing leaders, including the relationship of recognition to accountability, a topic Dr. King addresses as well. We conclude with out next steps – setting group and individual goals.

Session #6 Objectives

1. Assess Chapter and Group leadership needs.
2. Determine group and individual leadership development objectives.
3. Learn how journaling will work and coaching feedback provided.

Session #6 Readings

1. The Bible, Exodus, Chapter 18. [2 pages]
2. Dr. M.L. King, "The Drum Major Instinct," *A Testament of Hope*, San Francisco: Harper Row, 1986, pp.259-67. [5 pages]
3. Marshall Ganz, "Leadership Development", 2006.

I. **LETTING OTHERS LEAD: Leadership Rich/Leadership Poor (20 min.) (1:00 – 1:20)**

A focused discussion of why we resist delegating, the distinction between control and power, and the challenge of letting others lead. This is the place to discuss the difference between "responsibility" and "task"; between "activists" and "leaders": the relationship of volunteer recognition to volunteer accountability; taking a developmental approach to works design, volunteer recruitment, training, etc.

II. **A LEADERSHIP DEVELOPMENT CYCLE (30 min.) (1:20 – 1:50)**

A. **Creating opportunities to identify leaders and potential leaders to meet Group and Chapter needs.**

B. **Creating opportunities for individuals to earn leadership.**

C. **Creating opportunities for leadership development (skills and capacity)**

III. **GETTING STARTED (60 min.) (1:50 – 2:50)**

A. **Preparation (5 min.) (1:50 – 1:55)**

Goal of the breakout is to come up with a "group goal" for leadership development by the next session and "individual goals" for leadership skill development. Pass out the “action plan” as an assist.

B. **Team Work (40 min.) (1:55 – 2:55)**

Based on the common focus identified by the ExCom over the course of the work shop, the strategic work already begun, and action steps taken, facilitators work with ExComs to determine outcomes to which the ExCom commits to achieve by the next workshop. Individuals set goals for their own skill development, especially with respect to relationships and motivation. The group uses strategic deliberation to achieve this outcome.

C. **Debriefing (15 min.) (2:55 – 3:10)**

The LD coordinator for each ExCom reports out their plan for doing LD when they get back. Group feedback and evaluation**.**

SESSION #6: Closing Session (50 min.) (3:10 – 3:40)

I. **WHAT’S NEXT (15 min.) (3:10 – 3:30) (MG)**

A. **Coaching Follow-up / Demonstration (AR)**

B. **Reporting/Measures Follow-up (RW)**

C. **Next Leadership Workshop**

II. **FINAL EVALUATION (15 min.) (3:30 – 3:45) (MG/RW)**

III. **BENEDICTION (5 min.) (3:45-4:00) (SC)**

(Trainer Check-in) (4:15 PM – 4:45 PM)

Section 3: TRAINING THE TRAINER: FACILITATING

This section includes the trainer training schedule for Thursday and Friday, May 18-19. It also includes the facilitator's guide to the five team work sessions that you will be responsible for leading: common interest, shared story, strategy, action, and local leadership development. Feel free to make notes in the margins as we go along and ask whatever questions occur to you.

TRAINER TRAINING AGENDA: FACILITATION
(THURSDAY – FRIDAY)

Objectives

A. **Provide trainers with an understanding of their role in the LDP Project**

1. **To provide leadership to their assigned ExComs in successfully completing their work, by (a) facilitating workshop sessions, (b) coaching at the workshops.**
2. **To provide the research team with clear and timely feedback on their experience from facilitating and coaching, and to identify and strategize to solve problems and share insights.**
3. **To take leadership in developing the capacity to diffuse the practices learned throughout the Sierra Club at the conclusion of the pilot project.**
4. **To spark formation of a national "training community" within the Sierra Club.**

B. **Provide training in the skills they need to fulfill responsibilities in the launch workshop.**

C. **Provide training in the skills they will need to fulfill field coaching responsibilities following the workshop.**

THURSDAY

II. **Welcome (15 min.) (9:00-9:15)**

A. **Introduction**

B. **Objectives of Training**

C. **Review Agenda**

D. **Introductions (and norms for the day)**

II. **How Facilitation Works: Conceptual Framework, Modeling, and General Practice (120 min.) (9:15-11:15)**

A. **Understanding Facilitation I (Lecture/Discussion) (15 min.) (9:15-9:30)**

1. **Relational**
   Focus on the people: learn who the participants are, who can be helpful, who requires special attention, who can contribute but isn't speaking up.

2. **Motivational**

   Attend to the energy of the group by both encouragement and boundary maintenance. : affirm people for their contributions, encourage those who are reticent, make space for all by managing those who want to speak all the time, establish respect for norms.

3. **Conceptual**

   Do the idea work: probe for deeper understanding, question assumptions, ask about things that puzzle you, learn to recognize puzzlement in the faces of others so you can call on them or ask questions they may be reluctant to ask.

B. **Practicing Facilitation (Exercise I)**

All three skills—relational, motivational, conceptual—are engaged at the same time in the act of facilitating a group. We will break these skills down in our debrief of the group exercise, but the actual exercise will require practicing multiple skills simultaneously.

Fishbowl (45 min.) (9:30- 10:15)

Ruth calls together a group consisting of Adam, Marshall, Erin, Sarah. Their purpose will be to generate a shared goal for what they want to accomplish by the end of the weekend.

Debrief (30 min.) (10:15-10:45)

We review what happened in the fishbowl, organized around **relational**, **motivational**, and **conceptual** facilitation work. We pay careful attention to specific behaviors that facilitators can engage in to manage each effectively.

Notes Page:

Relational	**Motivational**	**Conceptual**

BREAK
10:45-11:00

Group practice (45 min.) (11:00-11:45)

Facilitators are formed into teams of five, each team member acts as facilitator in rotation, and takes the team through the exercise Ruth just modeled.

Each group of five will go through precisely the same exercise.

1. The first facilitator will establish the norms and frame the exercise.
2. The second will handle introductions and personal goals.
3. The third will invite additional brainstorming and draw connections among the items.
4. The fourth will help the group reach a choice among the options.
5. The fifth will conduct the group debrief.

The groups report back from their debriefs, and Ruth helps the whole group discuss the general issues that arise from those debriefs. **(11:45 - 12:00)**

C. **Practicing Facilitation (Exercise II): Focused Work on Finding Themes (12:00-12:45)**

This segment of practice is aimed at helping facilitators develop their ability to identify themes and connections among items generated in a team. This is a difficult skill to develop, and requires a little focused attention.

Process:

1. Marshall facilitates a group of six. This team will generate ideas in response to questions posed by Marshall (see attached list of questions). They spend 5-10 minutes brainstorming, with Marshall capturing their idea. Ruth stops the action periodically, and calls on one of the observing trainers to describe the themes s/he sees thus far. Process continues, with Marshall posing new questions to the team for a new idea generation session, until all trainees have had the chance to practice identifying themes. We periodically rotate membership of the brainstorming team as the exercise unfolds, to create new variance in ideas and to give all members practice opportunities.

2. Short lecture based on what came out of the exercise, focused on *how* items can be connected and how to help a group by showing them the connections among individual ideas.

a) Parts of a greater whole
b) Single examples of a larger theme
c) Temporal sequencing of events

D. **Understanding Facilitation: Wrap-up and summary (15 min.) (12:45-1:00)**

1. **Relational**

2. **Motivational**

3. **Conceptual**

LUNCH **1:00-2:00**

IV. **Facilitating Workshop Sessions: Practicing for the Launch Workshop (2:00-6:30)**

A. **Introduction and Agenda for the Afternoon (15 min.) (2:00-2:15)**

The purpose of Thursday afternoon's practice is to prepare the facilitators specifically for their role in each of the team exercises during the launch. For all four, the facilitators will learn:

1. **How to frame the session (purpose)**

2. **What visuals to use**

   a) written instructions
   b) previously generated materials (where relevant)
   c) Structure for capturing newly generated material (e.g., "resources," "outcomes...")

3. **Timing overall and timing cues to provide the group**

4. **Special challenges in the group conversation for this particular exercise**

5. **What should be captured by the end of the session?**

6. **Evaluating (and some especially useful debrief questions specific to that session)**

Participants will be placed into groups of four. Each individual will get practice facilitating the team through at least one exercise.

Each session begins with 10 minutes on the setup and challenges for the session.

B. **Facilitating Session #1: Team finding common interests (45 min.) (2:15-3:00)**

1. **First facilitator: Framing the session and setting norms.**

   Introducing the people (Create 2 lists)

   a) *Identifying* interests

   b) *Identifying* resources

2. **Second facilitator: Discerning the threads of a common interest (brainstorming and synthesizing)**

3. **Third Facilitator: Helping the group decide its common interest for the project**

4. **Fourth facilitator: Leading the group through an evaluation of the exercise**

C. **Facilitating Session #2: Telling a shared story (60 min.) (3:00-4:00)**

1. **Modeling a story (Marshall with a selected trainer) (15 min.) (3:00-3:15)**

2. **Group practice (20 min.) (3:15-3:35)**

3. **Discuss strategies of a group story (25 min.) (3:35-4:00)**

BREAK **4:00-4:15**

C. **Facilitating Session #3: Building power (60 min.) (4:15-5:15)**

1. **Modeling. Ruth leads research team through the brainstorming of resources, outcomes, and tactics (20 min.) (4:15-4:35)**

2. **Group practice with one facilitator (20 min.) (4:35-4:55)**

3. **Whole-group debrief: Challenges of the Building Power session (20 min.) (4:55-5:15)**

D. **Facilitating Session #4: Taking action (45 min.) (5:15-6:00)**

1. **Ruth frames and explains the five checklist items for the action exercise (10 min.) (5:15-5:25)**

2. **Group Practice (15 min.) (5:25 – 5:40)**

3. **Whole-group debrief (20 min.) (5:40-6:00)**

G**eneral Debrief of Facilitating the Four Exercises: Group report backs and discussion (30 min.) (6:00 – 6:30)**

FRIDAY

E. **Facilitating the "Getting Started" Project session (60 min.) (9:00-10:00)**

The "Getting Started" session asks you to work with the ExComs to help them identify the outcomes they will accomplish on their project by the next leadership workshop (in about 2 months' time) and develop an action plan to get there.

1. **Framing the final session (15 min.) (9:00-9:15)**

2. **Group practice facilitating the session (25 min.) (9:15-9:40)**

3. **Debrief (20 min.) (9:40-10:00)**

FACILITATOR'S GUIDE TO TEAM WORK SESSIONS

Facilitating Session #1: Team finding common interests (40 minutes)

The Agenda

I. **Framing the Session (5 minutes):**

"The purpose of this session is to build on your relationships to identify a common interest in leadership development that you will work on together this weekend."

A. **Reviews Goals, Agenda**

B. **Selection of note taker, timekeeper**

C. **Establishment of norms**

II. **Introducing the people (10 minutes):**

Facilitator asks pairs to introduce each other to the group, reporting out interests and resources of the other. The facilitator asks each pair first for their common interest and posts it. Participants then introduce each other while the facilitator notes the resources that have come to light.

III. **Synthesizing (10 minutes):**

The facilitator reviews the list, identifying patterns so as to sort out choices the group must make.

IV. **Deciding (10 minutes):**

Facilitator leads the group in making a decision as to the interest that will be the focus of their work. They must decide how to decide (consensus v. voting), specify criteria of a good choice, and make the choice.

V. **Evaluation (5 minutes):**

What were the key learning points? Pluses and deltas?

Challenges/Strategies for This Session

- When you begin introductions, pick someone to start who you think will set a good precedent, who will share something (but not too much) of the other person's story, before describing interests/resources. Encourage the introducer to talk about what the person brings to the party, and write these up as "resources." This list will help get conversation going in the "devising strategy" breakout session.

- Keep the emphasis on *interests* here as opposed to *resources*. While the facilitator should be writing down resources in order to use in a subsequent exercise, the common interest on which people decide should not be based on resources available.

- Make sure participants are telling one another's stories, that they are explaining interests based on their values. To probe for someone's values, ask about choice points in that person's life. Whenever someone talks about a choice they made, remember that it could have been otherwise (they could have moved somewhere else, could have accepted a different job, etc).

- It is important that participants spend time sharing values and brainstorming interests before working to synthesize these interests. There is a temptation to jump straight to synthesis/deciding. An intervention may be necessary to prevent this!

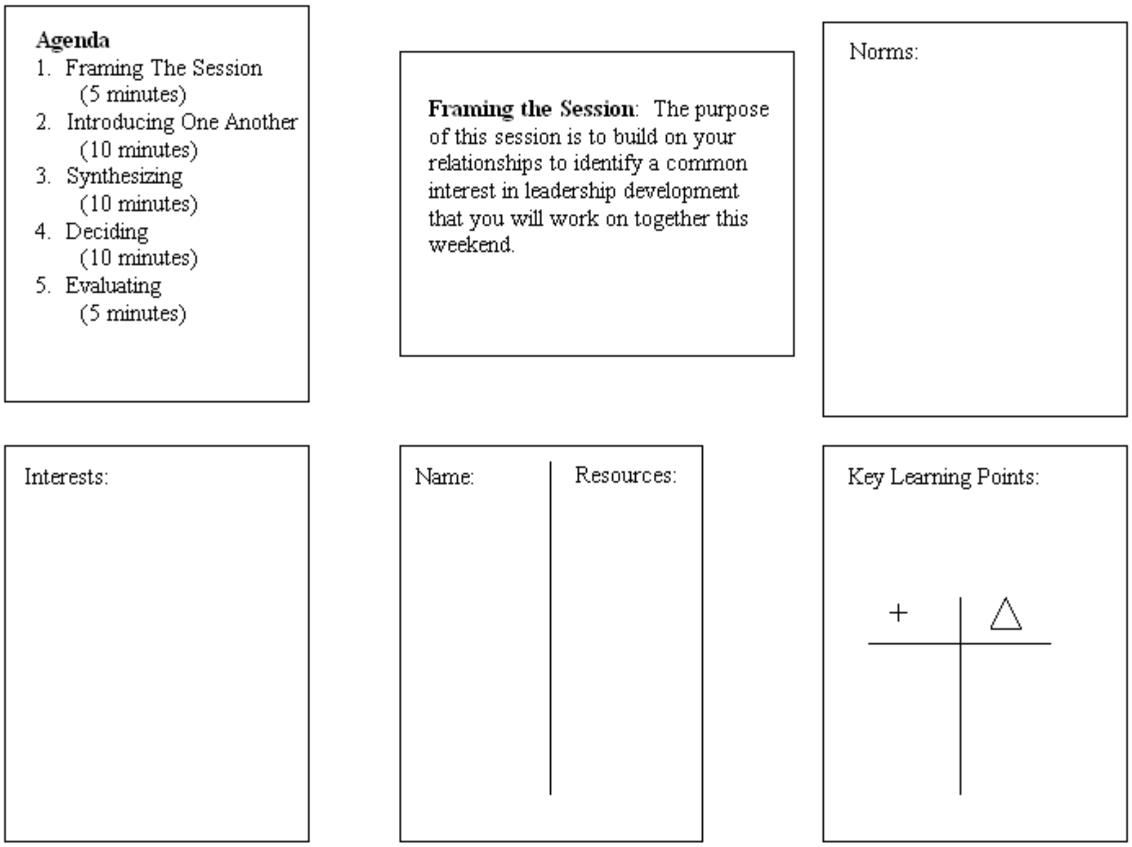
- Help participants find patterns among the interests they have. Look to see if these interests are part of a greater whole. Look for temporal sequences among interests (what could happen first, second, third, if all these interests were to be addressed things). Look for larger themes among individual items, and share these with the group.

- Set a precedent in this evaluation: Make sure that participants begin with the pluses, and then move to the deltas. Many times participants have a tendency to jump to what could have worked better.

Debriefing Questions:

- Are you feeling energized / passionate?
- Was it forced? Was there dissent?

Charts Up at the Beginning of This Session



Facilitating Session #2: Telling a shared story (50 minutes)

The Agenda

I. **Frame the Session, Review Agenda, Appoint Timekeeper (1 minute):**

"The purpose of this session is to ask each person to tell a personal story about why they care about the interest their group shares, why it's challenging, and why there's hope. Based on these stories, the team will learn to tell a group story of hope."

II. **Facilitator leads ExCom members in round of storytelling (30 minutes):**

Facilitator leads ExCom members in round of story telling. Each person tells a personal story of no more than 2-3 minutes about why they care enough about the leadership development challenge their group faces to do something about it and why they hope they can succeed. To prepare for the work of identifying themes, the facilitator can make a chart with one column headed "challenge" and another headed "hope". Right after the story s/he can note the element of "challenge" and the element of "hope" in the story just heard. Then the group can evaluate how well it worked.

III. **Telling a Common Story (15 minutes):**

To arrive at common story, the facilitator can go back to the challenge/hope chart to enlist the group in identifying themes. As the themes are agreed on, the group can choose their "story teller" who will tell their "group story" to the large group. The group story may be a version of their own story, a composite, or another way of conveying the motivation of the whole group without losing the power of a first person account. They can start with their own story, turning it into a group story by identifying the theme, referencing other stories, for example. They must tell a story, not tell "about" the story.

.

IV. **Evaluation (5 minutes)**

What were the key learning points? What were the plusses and deltas?

Challenges/Strategies for This Session

- When a person tells a story and invites feedback, make sure you can identify both the challenge and the hope in the story. For example, if someone tells a story of an issue that distresses them, make sure you ask about how they handled it.

- Make sure that the storyteller tells the story in the first person, instead of telling *about* someone else's story (e.g. "I'm going to tell a story about Pat, who….")

- The more specifics in the story, the better. When people are telling their stories, ask them for specific details, including images, setting, reactions, etc. to make it more captivating.

- Facilitators should have on their "looking for themes" hat: if there's something that jumps out at you, tell the participants. If there is a common theme, the storyteller might start the story by saying: "We believe in X theme—Let us tell you why…"

- If your group is large, you may not have time to coach all the stories thoroughly. Pick a few people to use as examples.

Debriefing Questions:

Probing questions to ask in the small group debrief on someone's story:

- What were moments when you connected with the story?
- What engaged you?
- How did it make you feel?
- Was there hope, where was it?
- Where did the story get most effective? What was it that brought the story alive?
- How could the story be strengthened?
- How could the story be shortened?
- What was the moral he/she was trying to teach?
- Were the stories specific?
- Where was the challenge?
- How well did we provide productive feedback?

Charts Up at the Beginning of This Session

Agenda
1. Framing The Session (1 minute)
2. Telling Personal Stories (30 minutes)
3. Articulating a Common Story (15 minutes)
4. Evaluating (4 minutes)

Framing the Session: The purpose of this session is to ask each person to tell a personal story about why they care about the interest their group shares, why it's challenging, and why there's hope. Based on these stories, the team will learn to tell a group story of hope.

Key Learning Points:

+	△

Facilitating Session #3: Mobilizing Power (60 minutes)

The Agenda

I. **Frame the Session, Review Agenda, Appoint Timekeeper (5 minutes):**

“The purpose of this session is to devise strategy to act on our shared interest in leadership development, using our resources to get commitments from others to a short term outcome that may help us achieve our long term goal..”

II. **Brainstorming (15 minutes):**

Brainstorming begins with the facilitator pointing to the chart of ExCom members and their resources derived in the first session: “Look at what resources you have! What would you like to add to this list?…” After brainstorming resources, ExCom members brainstorm outcomes they might achieve by reaching out to others by the next day. Again, it may be helpful to focus on a short term outcome that can help move a long term goal. What tactics can they use to achieve those outcomes? Whom can they target? Are there timing considerations?

III. **Synthesizing (20 minutes):**

Facilitator leads the group through a process of discerning possible pathways, looking for common threads. If one doesn't work, what might be another?

IV. **Deciding (15 minutes):**

The Facilitator leads the group through a decision making process, based on criteria that they believe should guide their choice, deciding on *both* a Plan A and a Plan B.

V. **Evaluating (5 minutes)**

What were the key learning points? What were the plusses and deltas?

Challenges/Strategies for This Session

- Make sure that the "interests" and "resources" charts from the first session are on the wall during this session. The resources chart lets you hit the ground running brainstorming resources.

- Participants will be tempted to jump to outcomes. Make explicit the counterintuitive nature of beginning with resources. The purpose of beginning with resources is to be unusually creative about what we have to bring to our work together.

- It might be useful to think of the common interest as a point of convergence, whereas the strategy is a pathway on which to proceed towards the group's goal.

- Make sure to engage ExCom members in a conversation about what criteria should serve as the basis for deciding what a good strategy is. Is it fun? Is it feasible? Is it high impact? Does it build capacity as oppose to drain it? How is your group going to evaluate the quality of a strategic choice?

- There is a tension, which becomes apparent in this session, between the significant and the feasible. That is, there are limits on the amount that a group can accomplish within the weekend, but this does not mean that real things can't get done within the weekend. We can't *resolve* this tension, but we can manage it.

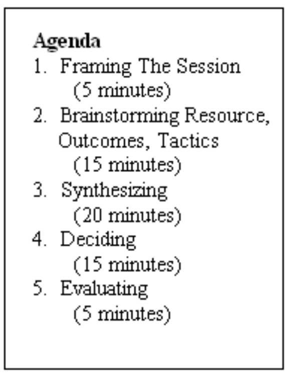
- The strategies in which Ex-Coms engage must involve *reaching out to and securing commitments from others*.

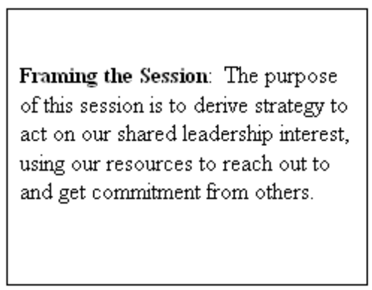
- Explain the importance of a Plan B. With many project groups, generating a shared interest is the primary group motivation. If the group discovers it can't go with Plan A, then the momentum gets killed. So it's essential to have a Plan B.

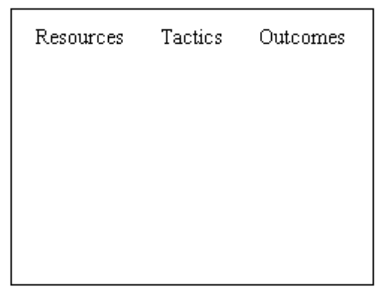
- Teach the language. Make sure that everyone is clear about the definitions of resources, tactics, and outcomes. Make certain that people refrain from critiquing ideas during the brainstorming period.

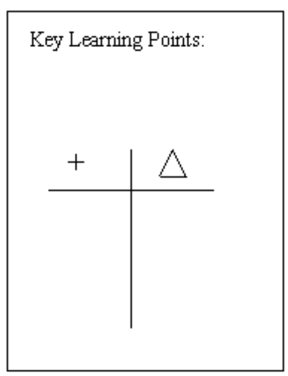
- You may want to test your outcome against a scale of 1 to 5 on two counts: insignificant to significant, and feasible to impossible. The outcome should be about a 3 or 4 in both categories.

Charts Up at the Beginning of This Session









Facilitating Session #4: Action Planning (30 minutes)

The Agenda

I. Frame the Session, Appoint Timekeeper (1 minute):

"The purpose of this session is to get organized to turn our strategy into action."

II. Crafting the Plan (25 minutes)

Facilitators will lead ExCom in crafting an action plan based on whom the ExCom will ask for commitments, how they will get them, who is responsible for what, what's their accountability mechanism, how they will measure success, how they will minimize/adapt to contingency. Each team will select an "action coordinator" who will role-play the "ask" for commitment that they will be making as part of their action.

III. Evaluating (5 minutes)

What were the key learning points? What were the plusses and deltas.

Challenges/Strategies for This Session

- Keep the flipcharts from the last session up on the wall for this session.

- In this session, the biggest challenge is people's performance anxiety. The facilitator has to be a mother bird kicking its babies out of the nest. This is where people's tendency to over-prepare ("the snare of preparation") is clearest.

- Make sure one person from your group is ready to role-play asking for commitments.

Charts Up at the Beginning of This Session

Agenda

1. Framing The Session
   (1 minute)
2. Action Planning
   (25 minutes)
5. Evaluating
   (4 minutes)

Framing the Session: The purpose of this session is to get organized to turn our strategy into action.

Outcomes

Commitments

Time

Contingency

Coordination
(coaching
accountability
recognition)

Key Learning Points:

+	△

Facilitating Session #5: Getting Started (40 minutes)

The Agenda

I. **Frame the Session, Appoint Timekeeper (1 minute):**

"The purpose of this session is for the team to devise strategy to act on its group interest in leadership development between now and the next workshop (group project outcomes) and to identify personal skill development goals."

II. **Crafting the Plan (35 minutes):**

Based on the common interest identified by the ExCom over the course of the workshop, the strategic work already begun, and action step taken, facilitators work with ExComs to determine outcomes to which the ExCom commits to achieve by the next workshop. The group comes up with an action plan to achieve this outcome. Secondly, each individual will be asked to identify personal goals for developing specific leadership skills.

III. **Evaluating (4 minutes)**

Challenges/Strategies for This Session

- Once the ExCom has identified a group outcome, it will want to divide that into individual tasks. The facilitator should emphasize that this is *group* work, and should question whether dividing it up into individual tasks makes sense.

- When discussing individual commitments, these are what individuals are committed to in terms of their personal leadership development, and may be unrelated to the group project.

- The facilitator should encourage participants to focus on outcomes related to relationship building and motivation, as these will be the focus of the next workshop.

- Make sure to write down each individual goal and the group goal at the end of the session. Keep a copy for yourself and turn a copy into the research team.

Charts Up at the Beginning of This Session

Agenda
1. Framing The Session
   (1 minute)
2. Strategizing Group Outcomes
   (25 minutes)
3. Individual Skill Development Goals
   (15 minutes)
4. Evaluating (4 minutes)

Framing the Session: The purpose of this session is for the team to devise strategy to act on its group interest in leadership development between now and the next workshop (group project outcomes) and to identify personal skill development goals.

Resources	Tactics	Outcomes

Individual Skill Development Goals

Key Learning Points:

+	△

Section 4: TRAINING THE TRAINER: COACHING

This section includes the agenda for the trainers' coaching session, the journaling and coaching plan, practice scenarios, and notes on online journaling.

TRAINER TRAINING AGENDA: COACHING (FRIDAY)

I. **Coaching Preparation (Friday 10:00-1:00)**

A. **Understanding Coaching (Lecture/discussion, 10:00-10:30)**

1. **Process Focus vs. Getting Caught up in Content**

2. **Kinds of coaching that can help the acquisitions of skilled behavior:**

   Motivational (effort)

   Strategic (performance strategy)

   Educational (knowledge and skills)

3. **Corrective vs. developmental coaching of these three types**

BREAK **10:30-10:45**

B. **Coaching in the Field: Discussion of Sample Journal Entries (10:45-12:00)**

1. **Identifying Coaching Opportunities in Sample Journal Entries**

2. **Providing Feedback on Journals (including staying agnostic on *content* and keeping one's eye on *process*). Facilitated discussion of how to provide good coaching.**

C. **Online Coaching (12:00-12:30)**

D. **Open Forum Discussion of Questions and Concerns (12:30-1:00): Trainees generate list of questions for discussion.**

E. **Wrap-up**

Notes Page:

Motivational	**Strategic**	**Educational**

JOURNALING AND COACHING PLAN

The Purposes of Journaling and Coaching

Journaling and coaching provide the scaffolding to support participants putting new skills to work over the course of the Leadership Development Project.

Between workshops, participants (members of group and chapter Ex-Coms) will journal daily about what skills they are putting to work, what they think worked well and what did not, and any questions, frustrations, or challenges they are facing. Journaling is an exercise in reflective practice—our core pedagogy for helping participants integrate their training with their ongoing work on behalf of their chapters or groups. It is an essential component in the transfer of training from a classroom setting to real-life leadership.

At our training for trainers, we outlined three ways of understanding: conceptual, affective, and behavioral. We will encourage participants to reflect in their journals using all three types of understanding: conceptual, in that participants will reflect on their work in relationship to specific frameworks addressed at the training; affective, in that participants will reflect on the emotional work in which they are engaged; and behavioral, in that participants will record specific steps they have taken toward the fulfillment of their LDP plans.

Because feedback in real time facilitates learning, every other week a coach will read each participant's journal and comment on participants' work. To do so, they need to be knowledgeable about the conceptual, behavioral, and affective challenges of learning leadership—but they also need some objectivity and perspective to help a participant persist and practice difficult lessons.

COACHING SCENARIOS

Here are some examples of sample journal entries you might encounter while coaching others. Think about these as we discuss how you should manage your coachees. Please feel free to take notes as we go along.

A. I definitely connect with the "leadership poor" diagram. In group work, for example, I tend to take the lead and do massive amounts of work up front, and then become very invested in the success of the project and feel as though "I'm really the only one who knew what I meant" when I laid down the project's structure, so I better either do the work or dictate what work should be done. So now I'm struggling with the difference between "delegating" and "engaging a leadership team in responsibilities. It's pretty clear to me that I've been doing a pretty sh*tty job fostering a "leadership rich" environment. Where do I go from here, then? How can I transition into creating the conditions and structures for other leaders to take responsibilities?

The truth is that it really *does* feel like I should just do these things myself because I have so much experience with the program, and so it would take less time for me to do it myself than to explain it to others. However I am reminded that part of what I am trying to do is foster leadership in others…but then I get confused again…foster leadership in others for what purpose?

B. 1:1's are counter cultural and so it takes ego to get them done. Just yesterday, I had a relational meeting with another leader whom I had never met before in person. We've talked on the phone and her organization had collected several hundred signatures in support of our anti-pollution ordinance. On Monday, I called her up to say that I would be driving through town, I knew we had talked on the phone a lot, and I wanted to see if she had some time to meet with me 1:1 so we could get to know each other better. When I got to the meeting, it turned out she only had 10 minutes to talk because she had to pick up her child at daycare. I was surprised. I explained that I was there so we could take some time to get better acquainted. Mostly what this made me realize is that I should do my best to be clear before a situation, and that I can navigate and judge a situation while it is happening to figure out what best to do – especially when the other person has no idea what a 1:1 is and why 10 minutes might not be enough time.

C. One obvious action I can take is to have one-on-ones with Alice and Lydia, the key leaders. In order to work together, we must be able to first build our relationship together. I realized that while I had met with some of the committee members, I have not yet met with Alice and/or Lydia. Meeting with them might allow for exploration of our interests, an exchange, and a renewed commitment to our roles as leaders. A real constraint is time. Because I work full time, it has been very difficult for me to make time to meet them for planning sessions on top of taking time off work for committee meetings and a family. I don't know how to get around that.

D. I haven't had much time this week to focus on the project, so there's not a lot I can say. I did try a one on one with a person I met casually at a family thing when he asked me what I do with the Sierra Club. But it turned out that he was just being polite, not really interested, so I let it go. Besides, people just aren't interested in talking for half an hour with someone they don't know.

E. When I start telling my story, about how I've been a hiker for years, but never saw any reason to join an organization like the Sierra Club, people seem to want me to just "cut to the chase". I mean, what I'm trying to say is that ever since my father took me on hikes – away from the mill town we lived it – I just loved being "out there", like it was a "special space", like I felt more alive. But they don't seem to want to hear about this – or what happened when they began developing one of my favorite trails. They just want me to tell them what I want them to do.

NOTES FOR ONLINE JOURNALING

Journaling and coaching will take place online. The web address for the coaching facility is:

https://research.wjh.harvard.edu/SCOJ

Two things to notice about the web address:

1. As a secure website, the address begins "https" as opposed to the standard "http."
2. Web addresses are case sensitive. Make sure the "SCOJ" is in caps.

Each participant has a password-protected space in which to submit daily journal entries and read coach feedback. Each coach has a similar space through which to read participants' journals, provide feedback to participants, and receive feedback on their coaching from the research team. Each participant and coach in the LDP has an account corresponding to their role:

Log-In Name: LastName_FirstInitial
Initial Password: LastName

Each trainer will be responsible for coaching eight to ten participants in a particular chapter bi-weekly, coaching three to five each week. The facility will double as a database for the research team, helping us more fully understand how people learn leadership skills and what sort of coaching is most useful in this process.

We have tried to make the facility as easy as possible to use. A guide to the coaching facility is attached below. This guide is also available online using the "help" button in one's account. If you have any problems using the facility, please contact Adam Reich at adamreich@gmail.com.

NOTES ON USING THE ONLINE JOURNALING FACILITY (FOR COACHES)

This facility uses a browser feature called "frames." You will always have access to two panels when you are working with the online journal.

I. **Selecting Material to View**

The top panel of your screen gives a summary of information about the Leaders you will be coaching and links for looking at materials in detail. Each time you click on a link in the top panel you will be selecting material and a style of viewing for the bottom panel. Here is a little more detail on your viewing options:

A. **Recent Entries:**

The most recent ten entries in reverse chronological order. Each of these entries will have a "comment" link at the far left. When you click on that link, you have a new screen with just that journal entry and with text boxes for you to add comments.

B. **Chronological Listing:**

Tagged by the word "Month" followed by the months for which a particular leader has journal entries. Click on the numerical "month", e.g. "05" for "May" to view all entries for May in chronological order. Viewing entries this way does not offer you an option to comment. In essence, commenting is available only for the most recent ten journal entries; after that, the entries and your comments are "history."

C. **General:**

Click here to make comments about a particular leader you are coaching when the comments do not fit with any daily entry but are rather observations about that leader of a more general nature.

II. Reviewing Leader Journal Entries and Related Coaching Comments

A. **When you are working with materials in the bottom panel you may want to expand the panel to fill more of your screen:**

1. **Move your cursor over the dividing line between panels until you see a double-headed arrow.**

2. **Left click and drag the divider to change the division of space between the two panels.**

B. **For the most part, except for this introduction, you'll be reading through your assigned leaders' journal entries in the lower panel, along with your own coaching comments, and comments made by the research team.**

C. **Keep in mind that the text size is not controlled by the application -- use the "View/Text Size" menu of your browser to adjust the size to what is comfortable for you. (The only size not affected by your adjustment is the size of text in the comment entry boxes.)**

D. **Entries will be dated and labeled by contributor. Also, to help you distinguish various contributors, there will be some color coding.**

1. **Your own original entry and any appended material or responses you make will be in black.**

2. **Your coach's comments will appear in maroon.**

3. **At times the person coaching your coach may make comments directly to you. These comments will appear in blue.**

E. **To enter a comment for a particular daily journal, click the "Comment" link at the left of that entry.**

F. **You may want to refer to a subsection of an entry in your comment. All materials on the journal screen are accessible for "cut and paste" operations. Highlight what you'd like included in your own entry for reference and "copy" it; then place your cursor in the comment entry box and "paste."**

G. **Your quotations will be more readable in the journal playback, both by the person you are coaching, and by the research team, if you take time to follow a small convention for marking materials you are quoting. Here is the system:**

1. **On a line by itself, just before the material you are pasting in, type a code for beginning the quote and for whose material you are quoting (NB the trailing colon is part of the code, e.g. "BL:"):**

Code	**Meaning**
BL:	**B**egin a quote from this leader's journal entry (**L** for leader)
BC:	**B**egin a quote from a coaching entry, i.e. your own earlier note (**C** for coach)
BH:	**B**egin a quote from your coach (**H** for head coach) to the leader or to yourself (only you will see these comments)

2. **Paste the quoted materials into the comment entry box.**

3. **Following the quoted materials, again, on a line by itself, place a code to indicate the quote is finished.**

Code	**Meaning**
EL:	**E**nd a quote from leader's journal entry (**L** for leader)
EC:	**E**nd a quote from a coaching entry, i.e. your own earlier note (**C** for coach)
EH:	**E**nd a quote from your coach (**H** for head coach)

III. So what's the pay off for bothering? Your quoted materials will be color coded in the same way as other materials from that contributor, and they will be indented and set off slightly from your own writing.

A. Alternate to using the text entry boxes for your comments. The entry boxes are provided for your convenience and they are the only avenue to storing your comments with the daily entries for the leaders you are coaching. However, if you find working with the small entry boxes difficult, try preparing your comments on a word processing screen and when you are ready, then copy and paste your entry into the text box.

B. Regardless of the method of entering comments, keep in mind that it's the words that count. No special highlighting, like bold or italics, will survive storage in the text files, so don't bother. Concentrate on words and punctuation to carry your message.

C. Note that while you do not need to hit "enter" to make new lines that fit the box -- text wraps nicely as you type -- you may do so any time you want to set off sections of text from each other, as in new paragraphs, and in the quote markup system noted above.

IV. **A Note on Data Security**

Data Security is at two levels -- transport across the network and storage of files on the server.

A. **Network transfer is using an SSL protocol (the https in your url) -- this means that information you send via your various "submit" buttons and the information used to comprise the web pages (journal entries) that you see are transmitted in an encrypted format.**

B. **Journal entry files are stored on a Unix server maintained at Harvard University, where some members of the research team involved with this project are based. Methods of storing the journals have been carefully worked through so that they are secured from unintended access, either from the web or through Unix logon sessions. Only you, the leaders you are coaching, your coach and members of the research team see the journal entries. Leaders only see their own entries and they do not see the comments your coach makes to you, only those she may make directly to the leader.**

NOTES ON USING THE ONLINE JOURNALING FACILITY (FOR LEADERS)

This facility uses a browser feature called "frames." You will always have access to two panels when you are working with the online journal.

I. **Navigation Aids**

The links at the very top of your screen control the content in the lower panel. They allow you to review your earlier journal entries. Here's a little detail on your options:

A. **Recent Entries -- this brings your most recent ten entries in reverse chronological order. You may click the "Comment" link at the left of your screen and enter a response to the notes you are reading from coaches.**

B. **Chronological Entries -- these are grouped by month and don't have a commenting facility. You may find them interesting to review occasionally.**

C. **General Entries -- use this link when you want to make a comment that doesn't relate at all to a particular journal entry and is more general.**

You'll find your own general comments, along with those of your coaches, stored in chronological order.

D. **Help -- this file is a work in progress -- let us know how we can strengthen the information provided here.**

II. **Creating Your Daily Journal Entries**

A. **Simply type in the box**

The large text box in your top panel is provided for you to enter your daily journal. Just type the entry -- you need not hit returns at the ends of lines, your lines will "wrap around." However if you do hit a return to indicate a new section, this will be preserved in your journal. Hitting the "tab" key will not enter spacing in your journal but rather will take you outside the text box -- no problem, just click back in.

B. **Alternate Compose Possibility**

If you find writing in the online box difficult, consider using a word processor to actually compose your entry. When you have your entry ready, highlight the text and copy it (usually ctl-c) and then click in the journal entry box in your browser and paste your entry (usually ctl-v). The storage system deals with plain text files, so even though you are using your word processor, concentrate on the words and don't take time with special effects, like bold or italics. Only your words and punctuation will be saved in the journal.

C. **Storing Your Entries**

Your daily entry will be stored once you hit "Store Entry" to the left of your entry window. Once stored, your entry cannot be changed. However, you will be able to add to your entry any time during that same day by placing additional text in the entry box. These additions will be labeled "Appended" in your journal.

D. **Saving a Temporary Draft**

If you have not finished an entry and need to stop working on it for a while before submitting it, click the "Save Draft" button. Your entry will be stored for you and placed back on your entry form the next time you log in. If you don't come back until a different day, your entry will be dated for the day you actually submit it, and not for the date you began it, so do try to return to complete a saved draft on the same day you begin it.

III. **Reviewing Your Journal Entries and Coaching Comments**

A. **You have a variety of options for the contents of your bottom panel -- activate them by clicking links in the navigation bar at the top of your screen.**

B. **When you are working with materials in the bottom panel you may want to expand it to fill more of your screen:**

1. **Move your cursor over the dividing line between panels until you see a double-headed arrow.**

2. **Left click and drag the divider to change the division of space between the two panels.**

C. **For the most part, except for this introduction, you'll be reading through your journal entries in the lower panel, along with coaching comments. Entries will be dated and labeled by contributor. Also, to help you distinguish various contributors, there will be some color coding.**

1. **Your own original entry and any appended material or responses you make will be in black.**

2. **Your coach's comments will appear in maroon.**

3. **At times the person coaching your coach may make comments directly to you. These comments will appear in blue.**

D. **If you want to respond to your coach's comments, or in general to add material relating to a particular day's entry at a later date, click the "Comment" link at the left of each entry.**

E. **You are likely to be doing a lot of reading of entries and comments. The text size is not controlled by the application -- use the "View/Text Size" menu of your browser to adjust the size to what is comfortable for you. (The only size not affected by your adjustment is the size of text in the entry boxes.)**

IV. **A Note on Data Security**

Data Security is at two levels -- transport across the network and storage of files on the server.

A. **Network transfer is using an SSL protocol (the https in your url) -- this means that information you send via your various "submit" buttons and the information used to comprise the web pages (journal entries) that you see are transmitted in an encrypted format.**

B. **Your files are stored on a Unix server maintained at Harvard University, where some members of the research team involved with this project is based. Methods of storing the journals have been carefully worked through so that they are secured both from unintended web or Unix access. Only you, your coaches and members of the research team see your journal entries. Other participants in the project do not.**

Section 5: GETTING STARTED

TRAINER CHECKLIST

You're now ready to begin your most important role as a trainer, coaching participants to success in using new skills to move their agenda forward. These are some suggestions about how to get started.

1. **Be clear about the goals – group and individual.**

Each ExCom has decided on a leadership development outcome to which they have committed, as has each individual ExCom member. Enter these goals on your coaching worksheet so you can keep them before you as you set to work helping them to achieve them.

2. **Know your people.**

If you have not already had a one on one with each of the people whom you will be responsible for coaching do this as quickly as you can. Knowing the people with whom you are working will make your work far more fruitful. Make sure you have their complete contact information.

3. **Set your schedule.**

Use a calendar to schedule the time you will commit to reviewing the journal entries of your "coachees", when you will write your comments, when you may want to check in with them and when you will consult with your lead trainer.

4. **Learn the technology**

Familiarize yourself with the journaling system, play around with it, try different things, so you can use it easily and serve as a resource for your "coaches".

5. **Develop a coaching strategy.**

As you get to know your people, develop a strategy for working with each of them. What do you see as their challenges, their strengths, to what point they are likely to get, and how you can help them get there.

6. **Plan a midpoint assessment.**

Schedule the time about midway between now and the time of the next workshop to do an overview of where you are, see what patterns you can see, and think about your strategy for the second half of the time period.

Section 6: CONTACT INFORMATION

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