

Team Purpose Worksheet

Team members should be able to articulate for others a narrative (think: elevator speech) about the team and its members, the work they do together, and why team members believe they must and can achieve their charge.

INSTRUCTIONS: Come to agreement about a narrative of your team's purpose using the following process. **Record your answers below or on a flip chart.**

1. Take 3-5 minutes of silence for each team member to write down a brief description of the team purpose that includes: who the team is, what you do together, and why the team's work is important.

2. Each team member reads his or her sentence. Those listening write down SPECIFIC WORDS you hear that resonate with you:

Words describing who team members are	Words describing work of team	Words describing why team's work is important

3. Discuss which words resonate with all team members (and/or put them on a flip chart.)

4. Assign one team member to take a few minutes to compile a team purpose narrative that captures the words and ideas the team as a whole liked best.

Establish Team Norms: How You Will Work Together

Teams with explicit operating norms have a much higher likelihood of achieving the results they're aiming for. Team norms are important to discuss and agree to as a team. A norms discussion doesn't have to take a great deal of time, but it should be specifically scheduled. It should include norms for "what we will always do" and "what we will never do" in three areas:

Managing meetings

Discussion and decision-making

Work between meetings: follow-through and accountability

Some team norms are operational, such as how often will we meet? How will we share and store documents? Communicate with others outside the team? Others address expectations for member interaction with each other.

Teams with norms that foster effective teamwork perform much better than those whose norms undermine collaboration or that have no shared expectations at all about how to work together.

Team norms will form whether or not you take steps to put them in place. The norms that arise naturally, however, often are not helpful. In the absence of explicit team agreements, each member assumes his own code of conduct. This implicit process can start a descent into lowest-common denominator behavior, a downward spiral of decreasing effectiveness, and frustration for those whose code of conduct and expectations of a team are much higher. For example, if one member misses a meeting and is not confronted, then the norm becomes, "Missing one meeting is OK." It applies until a member inevitably decides to test those boundaries and misses two meetings – and also is not confronted. Now the norm is, "Attending meetings is optional."

Establishing norms is an iterative process. Initial norms guide your team in its early stages as members learn how to work together as a part of an effective team. Once you've gotten comfortable working together, then you can revisit norms.

Good norms are always the result of careful assessments of what helps the team and what is getting in the way, and are established and refined through regular group review of how well the team is doing.

Norms for Virtual Teams or In Person

Teams that do not meet very often in person, but mainly via email or conference calls, need to establish norms every bit as much as teams that meet in person. The following discussion of norms is especially aimed at teams operating virtually – by phone or email. But they apply equally to all teams.

Meeting Management: Teams work best when members know and care about each other. A norm should be set about making the time to get to know one another in an intentional way and sharing personal stories that build trust.

Teams need to meet regularly to maintain momentum. For Sierra Club teams that are geographically dispersed, this means regular conference calls scheduled 2 or 3 in advance, or on a regular day and time. Call time (all meeting time) should be well spent. A norm that prioritizes agenda setting in advance of every meeting so that members can prepare for the call is important.

Decisions and action items should be captured. You will need to decide if one person will take notes or if team members are expected to share this responsibility on a rotating basis.

People need to know who is speaking. For conference calls, a norm for identifying oneself needs to be established – at least at first, until people are able to recognize each other's voices. Background noise must be kept to a minimum. Establish norms on side conversations and knowing when to mute call lines.

Effective teamwork requires the full attention and participation of all team members. Meeting norms should discourage other work, checking email, etc.

Team members need to be clear on decisions and commitments. Set a norm for closing each call by reviewing decisions made and action items assigned.

Discussion and Decision Making: Effective teams encourage vigorous debate around choices. Norms should acknowledge that conflicting perspectives are normal and promote debate focused on issues – not on personalities.

Effective teams balance inquiry with advocacy in order to find the best answers. Adopt norms that encourage sharing of new perspectives and understanding of other's points of view. Effective teams pay attention to their intentions. This means a norm of keeping the interests and goals of the team in the forefront of all decisions.

Effective teams fully utilize all the talent on their team. This means a norm of monitoring air time and encouraging contributions from all members.

Members of effective teams commit to implement team decisions. This means a norm of acknowledging disagreements, but being committed enough to teamwork to agree to support the team decision when your perspective is not shared.

Team members need to respect confidentiality when there is a need and commitment to confidentiality. Gain agreement in advance for how to handle confidential discussions and how such discussions will (or won't) be reported out to others.

Between Meetings Follow-Through/Accountability: Teams need to get work done between calls (and meetings.) Everyone should know what work is expected of team members between calls, what work they committed to and that the team is counting on them for, and how to communicate with one another to get that work done. Teams need to get work done to reach their goals and meet the charge they've committed to as a team. It's important for teams to set clear norms for check-ins on progress as well as how to alert others or ask for help if a team member cannot fulfill a commitment.

Teams need to communicate effectively. Everyone should know when to respond to emails sent to the entire team, when everyone should be copied on an email, and what key words to use in the subject line to identify who needs to respond to an email and by when. Establish expectations for providing feedback.

Teams need to move documents through the process in a timely manner. Establish norms for how you handle the drafting and reviewing of documents: the review process, recording edits, labeling different versions of documents, storing documents, handling confidential documents, etc.

Team Norms Worksheet

Instructions: Review the sample team norms below. Add, subtract or modify to create norms for your team.

Meeting Management	
<p><u>Always Do</u></p> <p>Start on time; stay on time</p> <p>Be fully present throughout the meeting</p>	<p><u>Never Do</u></p> <p>Come to meetings unprepared</p> <p>Answer cell phones or do email</p>
Discussion and Decision-Making	
<p><u>Always Do</u></p> <p>Engage in open, honest debate</p> <p>Ask great questions</p> <p>Balance advocacy with inquiry</p>	<p><u>Never Do</u></p> <p>Engage in personal attacks</p> <p>Fail to listen to what others say</p> <p>Jump to conclusions</p>
Between Meetings Follow-Through/Accountability	
<p><u>Always Do</u></p> <p>Be very clear about who will communicate with who and when</p> <p>Follow-up on action items</p> <p>Offer support when there is a need</p>	<p><u>Never Do</u></p> <p>Assume tasks are getting done without checking in</p> <p>Commit to a task that you know you won't do</p>
<p>How will you "self correct" if norms are not followed?</p>	

Sample Initial Team Meeting Agenda

Follow the specific instructions for the exercises on the previous pages in this section.

NOTE: You might not need to use all of these exercises for each team you work with, or use them all at the first meeting.

60-120 minute agenda:

1. Begin Building Relationships – learn others' stories

Story Mapping – *only appropriate for in-person meeting*

2. Building Trust among Team Members – sharing something personal

- a. Personal Histories Exercise
- b. Team Member Introductions

3. Team Charge – getting clarity on the team's purpose

Review team charge – *if no existing charge, this will need more time*

4. Team Norms – establishing shared expectations

Review and establish team norms

5. Establishing Team Operating Procedures

- a. Set schedule of calls and in-person meetings
- b. Establish protocols for calls and meetings

Culture of High-Performing Teams

1. Developing Trust

- Members of great teams are open to trusting one another.
- They build relationships with one another, share their stories and take risks.
- They feel free to suggest a new idea, express a controversial opinion, or disagree with others – trusting that their views will be respected and valued by the team.

2. Mastering Discussion

- Great teams welcome different opinions and have open debate around ideas.
- Have every bit of constructive conflict possible, without stepping over the line into destructive behavior.
- Members of a trusting team can engage with each other when they disagree.
- They can listen to others' ideas and reconsider their point of view.
- They do not manipulate conversation to get what they want.

3. Achieving Commitment

- Commitment is a function of: 1) clarity and 2) buy-in.
- Constructive dialogue promotes genuine buy-in around important decisions by ensuring that all ideas and opinions are considered.

4. Embracing Accountability

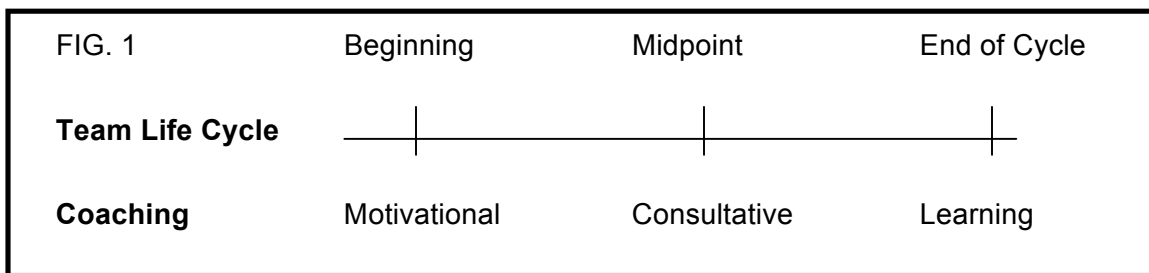
- Accountability means people can count on you and you can count on others.
- Accountability is everyone's responsibility.
- Team members should remind one another when they are not living up to the performance standards of the group.
- The team leader should model holding others accountable.

5. Focus on Results

- Teams must focus on collective objectives and clearly defined outcomes.
- It's important to keep team goals clear and reward behaviors and actions that contribute to collective outcomes.

Tips on Effective Team Coaching

The timing of team coaching is critical. There are times in the life of a team when it is especially open to coaching, and times when any attempt to make major changes in its trajectory are likely to be ignored. Beginnings, calendar midpoints, and the ends of projects or task cycles provide special opportunities for team coaching. Figure 1 shows the times when a team is most open to coaching, along with the kinds of coaching that are most helpful to it at those times.



Beginnings – The early stage in a team’s life is the time to create energy and focus the team on its purpose. This is where **Motivational Coaching** – support and encouragement at the start of a project aimed at enhancing team-level effort – is key.

Teams tend to come together faster and with less effort when there are established processes for launching teams and bringing members on board. Motivational coaching activities include: (1) articulating the team purpose, (2) establishing team boundaries by creating a sense of shared identity, emphasizing “we” and “our accountabilities”, (3) identifying the core capabilities of each member, (4) putting norms and expectations on the table for the group to revise and ratify.

Midpoints – The next major opportunity to make major alterations in the team’s process does not come until members have logged significant experience working together, often midway through a team project. Big changes in how the team works are not likely to happen – or if they are attempted, to take – until there is a natural break in the work. It is at the halfway point through a cycle, a meeting or a project – that teams tend naturally to reorganize themselves and reorient their processes in preparation for the second half. This is where **Consultative Coaching** – guidance and support in evaluating strategy at the midpoint in a team task – makes a difference.

Ask your teams to reflect on which approaches to the work are effective and which are misdirected or unconstructive. Pose questions such as, “What’s working?” “What do we wish we had or hadn’t done?” “What shall we do differently for the next half?” Some of the most effective coaching takes place at this time.

Endgames – You can accelerate the development of your team’s long-term capabilities if you take time at the ends of meetings, team tasks, and major accomplishments (or failures) to gather insights and reflect on lessons learned. Near the end of a task cycle – a project, campaign, a met or unmet deadline – the focus of coaching shifts from consultative to **Learning Coaching** – reflection on team performance aimed at helping the team learn from its work.

As the team matures, coaching increasingly becomes about helping the team learn from its experiences. If you have been consistent in enforcing team norms, members will start to spontaneously provide insights into what the team is learning and increasingly will manage themselves.

Between Times – Coaching during the time between a team’s key transition points – between the beginning and the midpoint, and between the midpoint and the end of a task cycle – should focus on quietly reinforcing good teamwork and, as needed, putting a stop to norm-breaking behaviors.

During these phases of a team’s work, you should attend to team norms: encouraging robust discussions and even disagreements, ensuring that members are listening to the positions of others, keeping the focus of critical comments on the issues and not on other members, and encouraging the team to wrap up its discussion and make a decision when an issue has been fully explored. Such coaching is an integral part of the everyday leadership of the team.

Who should coach the team?

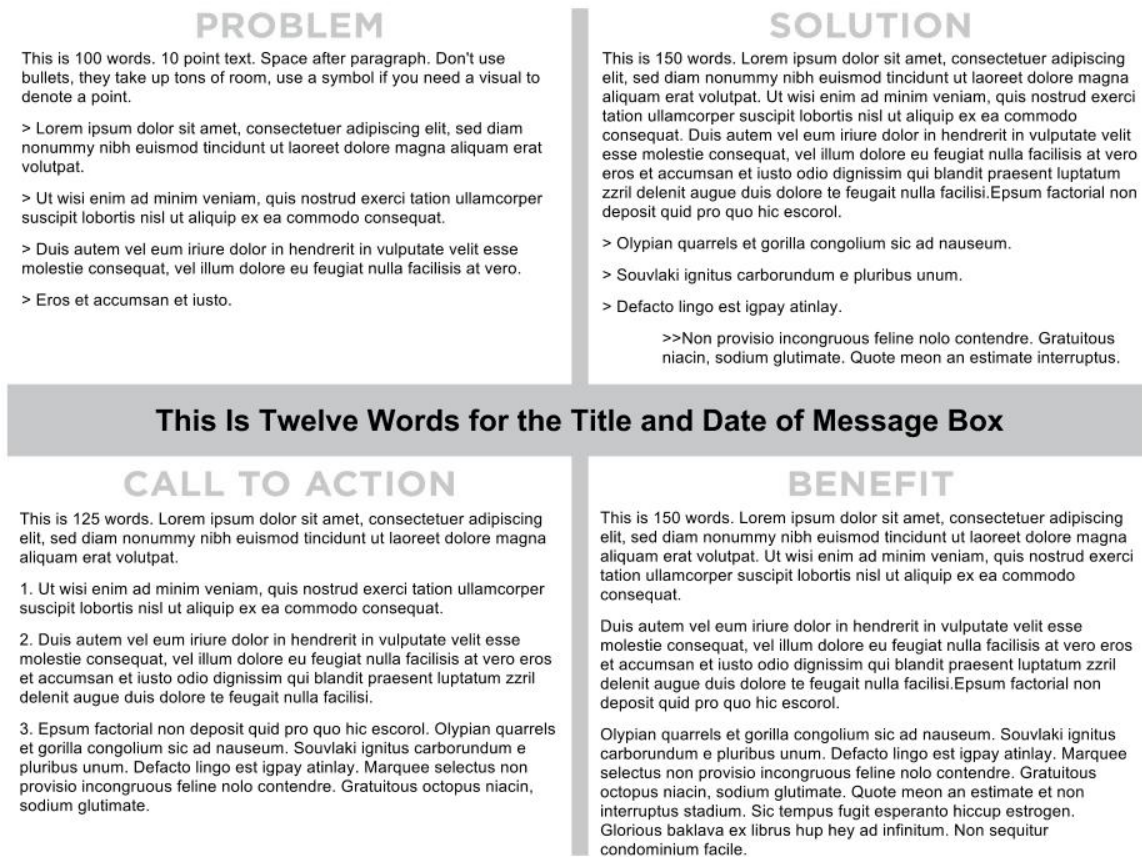
There is no one correct answer to this question. Some team leaders coach their teams. Others rely on particular team members. Still others seek outside help. Certainly it should be someone who has the capability to do so effectively and in a way that builds the team’s self-managing capabilities.

If as a staff or volunteer organizer, you are recruiting the team, you will need to decide whether to act as the team coach, work with the team leader to help them fill that role, or identify a team member who has excellent coaching skills.

In the early phases of a team’s life, the leader must take primary responsibility for enforcing norms. In later stages, the team itself, helped by good coaching from the leader, a team member or from an outsider, can share that responsibility.

Message boxes and message triangles are simple visual tools defining strategic messages that will be presented to public audiences through the media. Message boxes make us more nimble, succinct and able to respond to reporters' questions while staying on-message. They are much easier to use than long lists of talking points!

The Sierra Club has adopted one standard format for message boxes, with 4 sections of the box defining one main message. **Together, the 4 components of the message box tell a persuasive and comprehensive story.**



- Starting at the top of the box is the message related to the “**problem**” – a lot of Sierra Club issues relate to threats to a clean, healthy and protected environment and stable climate. So when we are delivering a strategic message, we have an opportunity to define the problem as we see it -- and set the stage for proposing a solution or change.
- Moving clockwise, the righthand side of the box is the “**solution**” to the problem” we've defined. Communicating compelling solutions is key to political communication – research shows that simply “raising awareness” or get people upset by defining problems does not motivate them to join a cause or see things from a given perspective. We must also present solutions, to show people that they can take action to make a difference!
- The bottom of the box is the “**call to action**” – where we explain how we (our target audiences and targets) can work together to implement the solutions we've defined.
- The lefthand side of the box is the “**benefit**” – how we as a group, a community, and a nation will benefit if we do solve this problem and act together. Clearly communicating the benefits to a given political issue is essential -- remember that most public and media audiences are not as

passionate about environmental issues, as we Sierra Clubbers are! So we must make explicit WHY people should care.

3. STRATEGY

Tie Tactics to Targets to Achieve Goals

The Sierra Club places a premium on grassroots organizing as a means to build power so that we can be successful winning conservation victories. In the fight to protect the environment, there are two sources of power in the political process: people & money. Our opponents will always have more money than we do, so we need to recruit, train, and involve people to build our power. We place an emphasis on building one-on-one repeated contacts and relationships with people we are trying to recruit.

In the context of the Sierra Club's grassroots organizing program, we define grassroots organizing as building a citizens' membership-based organization that works to gain political power to advance the end goal of saving the earth.

Why We Plan

We take campaign planning seriously in the Sierra Club. The reasons we take it seriously include: (1) it is our roadmap to success; (2) it lays out expectations, makes assignments and deadlines; (3) it is a process that involves key "stakeholders" in our effort, ensuring their in-put and buy in; and (4) it gives us a way to define and measure our success so that we can learn from what we do and be more and more successful over time.

The model of grassroots organizing used by the Sierra Club has been inspired by the Midwest Academy's Direct Action Organizing (DAO) organizing model.

Key components of the DAO campaign planning model include:

- 1. Being very clear about campaign goals:** What are your intended external outcomes (i.e. conservation goals) and how are we going to build organizational scale through implementing the campaign?

In defining grassroots organizing, Populist organizer, journalist, and former Texas Agriculture Commissioner, Jim Hightower says, "Environmentalism is not just about protecting our environment, but also about exercising our power."

2. Being very clear about organizing targets: Who is the target of the campaign? Who has the power to grant your goals?

3. Being clear about the campaign message: What message will move the target and the citizens you hope to engage in the campaign?

4. Being very clear about tactics: What tactics will engage large numbers of people in organized ways to put pressure on your target to grant your demands?

In this section, we will provide the Sierra Club's model for a campaign organizing plan, the Campaign Organizing Planning Matrix, and discuss in more detail the key elements of a successful grassroots organizing campaign.

Campaign Goals and Targets

Campaigns are by definition focused on an outcome – on achieving a visionary goal that will be a real, concrete change from the status quo.

Achieving a long-term vision may take decades. Campaigns need to estimate and project how progress will be made step-by-step to reach short- and medium-term milestones.

Choosing what milestone to focus on first, then next, is what strategy is all about. It is the route we plan to take to get to goals we've committed ourselves to reach.

Target Decisions and Decision Makers

Positive outcomes for the environment don't just happen; they result from specific decisions made by specific people. Decisions to deny or approve permits, adopt or reject environmental standards, build or retrofit facilities, pass or defeat legislation, increase or decrease funding, these decisions are made by agency staff, elected officials, resource managers, corporate executives, facilities owners, home owners, and many others. What is important to the

Sierra Club Campaign Organizing Planning Matrix

A. National Campaign/Conservation Goals

1. Goal for Environment
2. Specific Campaign Outcome
3. Interim Milestones

B. Power Building/Organizational Goals

1. Team Leaders
2. Teams
3. Participant Activists
4. Grasstops
5. Activists Recruited On-Line
6. Diversity
7. Coalition Partners

C. Target Selection & Power Mapping

1. Decision to Influence
2. Strategic Rationale
3. Primary Decision-Maker Targets
4. Power Mapping
5. Secondary Targets

D. Messaging

1. Campaign Media Story, Key Talking Points and Slogan
2. Organizing Narrative

E. Identify Tactics to Build Power and Scale

1. Tactics
2. 6-Month Detailed Work Plan
3. Budget

development of campaign organizing strategy is to recognize that these are real people. Strategically targeting a specific campaign outcome means identifying whose decision it is that we must influence.

Many decisions with impact on the environment are made in private settings, by millions of home owners, developers, corporate executives, and others. Some Sierra Club organizing focuses directly on these private decision makers.

Most often the Sierra Club chooses to focus its campaigns on achieving results via public policy decisions because public policy influences the subsequent decisions of many others. Public policy decisions also have processes and deadlines that Sierra Club leaders and activists can engage, and that can involve others in the community as well.

Campaign and Organizing Strategy: Who decides what?

Role of Grassroots Organizers:

Grassroots organizers have key information and perspective that is essential for determining which decisions and decision-makers to target. By “organizers” we mean both paid staff and volunteer leaders whose focus is on engaging others in the community and in their chapter or group toward Club goals. Organizers, and those in the Club and community that they work with closely, have the best perspective locally about the Club’s capacity to mobilize enough people and develop the leadership needed to win. Long-time staff and volunteer organizers often have the best “read” on the politics of a given decision, such as who in the community is likely to follow whose lead.

Role of Media, Lobbying and Legal ‘Capacities’:

The Sierra Club media, lobbying and legal experts also have key perspectives about targeting specific decisions. In the Sierra Club, the individuals who have the strongest skills in these capacities are sometimes volunteers, sometimes staff, or both. Staff and volunteers with lobbying experience, have invaluable knowledge about the track record and political position of various government agencies, legislative bodies and officials that they’ve worked with many times. Media professionals have access to polling and messaging information that help us assess how the Sierra Club can best be a messenger, especially given the messaging tactics of our opponents. Lawyers have the expertise to assess how much leverage could be gained from legal action.

Role of Policy Experts:

Policy experts, again could be volunteers or staff, have a key role in determining which decisions to target because they have the ability to project the result or outcome for the environment of various policy options. How much less carbon will be emitted in to the atmosphere if we could successfully motivate 100,000 households to replace leaky windows versus exchange 100,000 low-mileage cars for

high mileage ones? It's not easy to project or assess the real "outcome" of gaining one policy decision over another, and in the Sierra Club we're always tempted to say, "We have to do it all." But saying we will do everything isn't a campaign. Campaigns are always, always focused on achieving a particular, concrete result. Knowing "what you get" from a given policy decision is key information, though not the only information needed.

WRMIG



NOLS
OUTWARD
BOUND
SCA

WILDERNESS RISK MANAGEMENT CONFERENCE

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Role of Campaign Leadership:

Campaign leadership needs to seek out and weigh these various perspectives. The leadership of the campaign overall is faced with balancing the Club's capacity to leverage some decisions more than others, the strength of potential opposition as well as public "sentiment" for change, along with the analysis of policy experts about the likely outcome for the environment from a given policy decision.

Organizing Tactics Tied to Targets

Who will we organize? Who will most influence our targets?

When our targets are public officials, those who elect or appoint those public officials are in a strong position to influence them. Public officials are also strongly influenced by other public officials; mayors can influence governors; governors can influence senators, and so on. All public officials are also people, with personal friendships, loyalties, interests, and points of view that impact who they pay attention to most. A *Power Map* is the best way to systematically explore and identify who we need to organize to influence our targets.

See "Building Grasstops Networks" for more on Power Mapping and identifying grasstops

What tactics will we use to organize people?

Organizing means creating "organization" that can be sustained for as long as it takes to win the next milestone, and then the next, and the next. How we organize people – what kind of leadership, teams, networks, coalitions, partnerships we put together – are key strategic choices for organizers. Well organized people have the power to attract more people, pass on skills and knowledge, plan and take action together, manage their time and pool their resources in ways that individuals acting on their own cannot.

See the three sections on TEAMS for more on how to organize teams.

What tactics we use to organize people, what training and coaching we provide them, how we support and motivate their work as they are getting started, what we ask them to do online and what we ask them to do together with others are all key challenges for organizers.

Campaign organizing is a part of the Sierra Club's overall organization and organizational structure. One essential aim of all Sierra Club campaign organizing is to build the strength of our organization as a whole, as we work to win our campaign goals.

See "How Sierra Club Works To Win" for more on Sierra Club's organizational strategy.

What tactics will we ask people to engage in to impact our targets?

If you're not sure how a tactic ties to your target, re-think. The result of all organizing should be that there are more people who can influence our target, taking actions that influence our target. Tying tactics to targets requires good planning, continual evaluation of "how it's going," and modifying plans based on what we learn.

How will we assess how well our tactics are working?

The only way to know you're making progress is to establish in your plan what result you expect to achieve, and then assess whether you were able to achieve it. Did the action you asked of people impact your targeted decision maker to take the action you wanted? Were you able to mobilize and organize the number of people you thought would be needed to influence the decision maker?

Planning a grassroots organizing strategy is like a scientist's hypothesis – a campaign organizing plan is your hypothesis about what it will take to achieve the results you need to win. As we actually engage others in action according to our organizing plan, we test our hypothesis. With each action we either gain a key result or learn more about what it will take to do so. As organizers, the only way we actually fail is to win nothing *and learn nothing*. As we know we cannot always win with each effort, we must plan in such a way so that we always learn something.

