

Directions

Journal of the Association of Nature Center Administrators // Fall 2023



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The *Directions* journal contains news and trends in the nature & environmental learning center profession, as well as relevant resources and stories of innovative leadership.

If you are part of the nature center profession and wish to receive more resources like *Directions*, see [ANCA membership levels](#).

Directions offers advertising space for [ANCA Business Partners](#), as well as individual [advertising opportunities](#).

Cover photo: The entrance to The Nature Museum in Grafton, Vt., featured in "Personnel Policy Overhaul."

About ANCA

Founded in 1989, the Association of Nature Center Administrators is a private nonprofit organization dedicated to promoting and supporting best leadership and management practices for nature and environmental learning centers. Serving more than 700 members, ANCA is the leader in the profession.

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Don't want to read on a screen? Print this issue — and then pass it onto other nature center staff!

Director's Notes: The Power of Positive Leadership

Jen Levy, ANCA Executive Director

THE NEWS has been overwhelming. The headlines have been inundated with stories of mass shootings, war, unimaginable human suffering, and political gridlock. It can be hard to remain committed to a better future, but it is critical to recognize stories of unity, progress, and effective leadership.

I am fortunate to have a job that aligns with my personal values and passions. ANCA has provided me with moments of joy and great satisfaction. Please join me in reflecting on the power of positive leadership: what are your professional triumphs, breakthroughs, and tales of inspiration? How often are they celebrated?

I want to celebrate a few moments from the ANCA Annual Summit in August. These moments demonstrate strong and effective leadership, continuous learning, and a desire for a better future.

Both of the 2023 ANCA Leadership Award recipients are exceptional leaders who demonstrate vision, integrity, empathy, resilience, and adaptability. Pete Smerud and Veronica Frehm reflected on the importance of our work and the ability to change lives and communities when they accepted their awards in Maine in August. They conveyed a strong sense of direction and purpose that left me feeling confident in our net-

work. Read about the 2023 recipients on page 4.

I love that we are considering alternative leadership models. Glenna Holstein and Mike Larson are ANCA members who have known each other for 15 years and together they led a session at the Summit on the ideas and practices of shared leadership. One of the session participants sent a note of thanks after the session that said, *"I can tell you that was the most excited group of people in the room and really just desperate for what Mike and Glenna were saying. But an hour was absolutely not enough time to get all the information that they had to share about shared leadership."* Without hesitation, Glenna and Mike agreed to share more — read their article on page 9 and register for the December 13th ANCA CONNECTS, [Cultivating Shared Leadership on Your Team](#).

As an organization we value learning and sharing, and we are a supportive community. That was evident in the Summit session, *Putting Staff First: Personnel Policy Overhaul*. ANCA Members Naomi Heindel and Nick Katrick met at the 2022 ANCA Annual Summit, connecting as first-time attendees and brand-new executive directors from Vermont. They were also leading comprehensive personnel policy reviews to improve benefits, clarify gray areas, and support their employees and organizations. Throughout

the work, they consulted with each other, and after successfully introducing new policies at their centers, decided to bring what they learned to the Summit. I attended their session, and it was excellent. Read more about their process on page 5.

The Maine Coast Summit was my 17th as the executive director of ANCA, and I left the event feeling hopeful for the future. I want to thank and celebrate all of the individuals who contributed to its success. First, our hosts, The Ecology School. They are a joy to work with and embody visionary leadership and extraordinary hospitality. Second, the ANCA Board of Directors. I am incredibly grateful for their support and encouragement and for serving as exceptional leaders and mentors. I am most thankful for the work of Asa Duffee, ANCA's Director of Marketing & Communications and Dan Auer, ANCA's Membership & Programs Coordinator. Asa and Dan took on a bulk of the planning and did an extraordinary job. It was incredibly satisfying to realize a dream of having a full-time staff who not only share the work of ANCA, but who bring energy, talent, new ideas, and effective leadership to our network. 🌱

ADVOCACY & YOUR MISSION

With a membership that includes hundreds of organizations, the ANCA network makes a major difference in communities throughout the U.S. and Canada. As community organizations, our voices can *also* make a difference in public policy.

Not only can advocacy help your community (and possibly your state or region), it can also help your organization achieve its mission. If your mission is to connect people to nature, promote sustainability, or protect natural spaces, there is almost certainly some form of proposed legislation at the local, state, or federal level that would support your mission. This support can be tangible, including new avenues of funding or other resources for your organization or community.

With these potential impacts, we encourage you to be aware of the legislation in your area, and evaluate how your organization might use its voice for policy changes that would benefit your community.

HOW DO I FIND LEGISLATION?

No one source will be able to identify *all* the legislation that is relevant to your community, but many resources exist. For state and federal legislation particular to our profession, we recommend the following two sites:

[National Caucus of Environmental Legislators: Bill Tracking](#)

An extensive collection of environmental legislation across the country, so that you can stay up to date on progress being made in your state.

[Youth Outdoor Policy Playbook: 2023 Policy Trends Report](#)

An annual report that highlights state policies helping youth spend meaningful time outside.

HOW DO I START?

Don't worry, lobbying isn't the only form of advocacy — your organization can still advocate in many other ways. For ideas on how you can effectively advocate, we recommend these resources:

[eeAdvocate: An Advocacy Guide](#)

A guide designed to help you become a better and more confident advocate for environmental education and to bring more support and funding to the field.

[National Council of Nonprofits: Everyday Advocacy](#)

An introduction to advocacy for nonprofits, with additional resources.

For more resources on advocacy within our field, see [ANCA's collection of advocacy and civic engagement resources](#).

Below: 2023 ANCA Annual Summit attendees participate in an "Open Space" process, where anyone may create a session.



Updates to the ANCA Board of Directors

July brought with it a new fiscal year for ANCA, and alongside the new fiscal year came updates to the ANCA Board of Directors. This year we welcomed four new members of the Board, and thanked two departing members for their contributions to our organization. In addition to these updates, the Board underwent changes in Officership, including Board President.

The new ANCA Board members are:

- Allison Mackley, Vice President for Education at Berks Nature in Reading, Penn.
- Andy Williams, Director of Satellite Properties at the Museum of Science and History in Memphis, Tenn.
- Jason Sanders, Executive Director of Dodge Nature Center in West St. Paul, Minn.
- John Harrod, Engagement Director at the Partnership for the Delaware Estuary in Wilmington, Del.

John DeFillipo, Executive Director of the Texas Conservation Alliance in Dallas, Texas, departed the ANCA Board after serving nine years, including two years as President. Brooks Paternotte, Executive Director of Irvine Nature Center in Owings Mills, Md., departed the Board after serving six years, including four years as Vice President (VP) of Development. We are immensely grateful to both John and Brooks for their many contributions to ANCA as an organization.

Kitty Pochman, Executive Director of the Linda Loring Nature Foundation in Nantucket, Mass., completed her two-year term as Board President. Kristin Smith, Recreation Manager for the Tualatin Hills Park & Recreation District in Beaverton, Ore., is

now President. We thank Kitty for her leadership these past two years, and look forward to Kristin's time in this role.

Dennis Pilaske, Executive Director of Chippewa Nature Center in Midland, Mich. was elected the new VP of Strategic Direction and Chad Truxall, Executive Director of Marine Discovery Center in New Smyrna Beach, Fla. was elected the new VP of Development.

The Board supports ANCA's work and provides mission-based leadership and strategic governance. We welcome ANCA members to express interest in joining the Board of Directors and/or a Committee of the Board [using this interest form.](#)

"Being immersed in the work of a nature center, like my own, is rewarding in a variety of ways. At the same time, being an active member of ANCA, and specifically being a member of the board, allows for a global view of nature centers and helps to build a professional community. The ANCA board is the voluntary service that I choose to engage in for the benefit of our field."

— Allison Mackley, ANCA Board Member



The ANCA Board of Directors and staff explore Irvine Nature Center in Owings Mills, Md., during the 2022 ANCA Annual Summit.

2023 ANCA LEADERSHIP AWARDS



ANCA serves to support best leadership practices for our profession, and as part of this work we aim to acknowledge and highlight the exceptional leaders within our unique field. To this end we give two awards annually, the ANCA Nature Center Leadership Award and the ANCA Outstanding New Leader Award.

The ANCA Nature Center Leadership Award recognizes an individual who in their role at the highest administrative level of an organization has made a major contribution to the success of a nature center, as well as important contributions to the profession through professional organizations and the support and mentoring of other nature center leaders.

The ANCA Outstanding New Leader Award recognizes an individual with the potential for future impact within the field of nature center administrators, who has already demonstrated leadership, professionalism, and creativity within their role. Recipients have less than five years of full-time work experience as the director, executive director, or leader at the highest administrative level at a nature or environmental learning center.

Each year we present these awards at the ANCA Annual Summit. This year we recognized Peter Smerud, Executive Director of Wolf Ridge Environmental Learning Center in Finland, Minn. with the ANCA Nature Center Leadership Award and Veronica Frehm, CEO of the Friends of MacArthur Beach in North Palm Beach, Fla. with the ANCA Outstanding New Leader Award.

Upon receiving his award, Smerud acknowledged nature centers and outdoor schools as organizations at the forefront of connecting communities with nature.

"We do the most important work in the world," Smerud said in a speech to over 150 participants at the Summit. "[We] are reconciling the relationship between

human systems and natural systems."

Smerud also spoke to the profession as a catalyst for changing our society's connection to the environment. "We seek paradigm shifts in society," Smerud said, and quoted American inventor Buckminster Fuller, who said, "To change something, build a new model that makes the existing model obsolete."

In her acceptance speech to Summit participants, Frehm reflected on the impact of professionals in our field, even if those impacts aren't always seen. She recounted a time in her own life when she was looking for a professional direction, but didn't have a strong sense of what to do. At that time Frehm took a trip to Yosemite National Park and came across a naturalist leading a youth program outdoors.

"I did not know that was a job," Frehm said, "and I wanted that job immediately."

Frehm indeed went on to work in outdoor programs, eventually leading to her current role at MacArthur Beach.

Whether or not that naturalist in Yosemite had a significant impact on the lives of those children, Frehm said, "he certainly had an impact on mine."

Frehm encouraged her fellow ANCA members that they've undoubtedly had similar "ripple effects" — and that though they might not always know of those effects, their efforts have a major impact.

"I'm so incredibly grateful for this award," Frehm said, "but I'm so much more incredibly grateful for all the work that every single person in this room is doing."

Do you know an outstanding leader in the field of nature and environmental centers? Nominate them for an ANCA Leadership Award! [LEARN MORE >](#)



Peter Smerud (left) and Veronica Frehm (right).





Putting Staff First: Personnel Policy Overhaul

Naomi Heindel, Executive Director of North Branch Nature Center in Montpelier, Vt.
Nikolas Katrick, Executive Director of The Nature Museum in Grafton, Vt.

AT THE 2022 ANCA ANNUAL SUMMIT, we met and discovered that we were both new Executive Directors of small nature centers in Vermont — and that we were both in the midst of personnel policy and benefits overhauls. We decided to stay in touch, shared our revised policies with each other, and then co-presented a facilitated discussion on the topic at the 2023 ANCA Annual Summit. For both of us, this process of overhauling our personnel policies and benefits has been about putting staff first. We’re excited to share our process and guiding principles here and hope that other nature center leaders will undertake this important work to support their staff.

Top: Staff at The Nature Museum.

Naomi: I became Executive Director of North Branch Nature Center (NBNC) in 2022, following in the footsteps of NBNC’s founding director. The organization has grown a lot in its 26 years, and now has a staff of almost 20 and a budget of over \$1 million. I found that our personnel policies and employee benefits, however, hadn’t grown up in parallel. Together with an HR Committee and HR Consultant, I spent a good part of my first year diving in deep to bring NBNC’s policies and benefits up to speed.

Nick: When I was hired as the Executive Director of The Nature Museum (TNM) in 2021, we already had a professionally written and reviewed employee handbook — but the pandemic was a catalyst for many changes at our small organization (annual budget of ~ \$300,000). In 2022, our HR Committee and I looked at PTO policies to make room for Covid-19 related leave, but expanded our work to make several other small, but important changes to our employee handbook.

Personnel Policy Overhaul (cont.)

Five Principles for the Process

When revising personnel policies at our respective organizations, five principles guided our process.

1. PROVIDE STRUCTURE AND CLARITY IN ORDER TO SUPPORT STAFF

When we work at small, community-oriented organizations, it’s easy to think we don’t need structure or policies, that we can keep things unwritten and casual. As the NBNC personnel policy grew longer, Naomi worried that lengthening the policy was unnecessary, overdone, or risked making NBNC feel corporate. Actually, staff need structure and clarity to feel supported. One newer staff member specifically said that having all the policies written down reinforced boundaries, provided safety and security in her job, and meant that

subjective interpretation, usually honed after decades at a job, wasn’t required for understanding basic things like how time off worked.

2. SUPPORT DIVERSITY AMONG STAFF

Nature centers celebrate and teach about the resilience, power, and beauty of diversity in the surrounding world on a daily basis. Modeling those values has to start from within. An employee handbook is among the first documents a new employee receives; making sure those employees are appreciated, acknowledged, and their needs accommodated sends a clear signal about their value in the organization. First and foremost, consider gender-inclusive language in the handbook. “He and/or she” is outdated and doesn’t reflect actual gender diversity in our populations. Using “they/them” is a great first step, though there are other

options as well. Non-discrimination statements indicate that your organization is serious about inclusivity. Look to federal and state regulations for what’s required, but if they are lacking, consider statements from organizations you trust and have a good track record for supporting diversity. Similarly, you may have state regulations around minimum parental and family leave, including accommodations for lactating parents. Also consider your policy around holidays. TNM decided to give staff the choice of when to take their compensated holidays (12 for full-time, 8 for part-time). This does involve an extra step of discussing schedules with supervisors, but it gives flexibility for staff to take holidays that work with their traditions, schedule, and family.

A monarch-tagging program at North Branch Nature Center.



3. BUILD APPRECIATION AND GRATITUDE FOR STAFF INTO LANGUAGE AND PRACTICE

Staff are often the lifeblood of an organization. Their work culture, skills, interests, and countless hours of effort drive forward organizational missions. Recognizing those efforts isn't just nice — it's essential. Too often, nonprofit culture encourages overworking, inappropriate volunteerism, and burnout as a badge of honor. The only way to counter these physically, emotionally, and organizationally destructive behaviors is to steer the other direction with intention and action.

TNM now gives full-time employees 15-20 vacation days, 10 sick days, and 12 flexible holidays per year, in addition to a flexible vacation policy. This is a first step toward a healthier time-off policy, but not an end point. Also, handbook language is only one part of the equation. You can have unlimited vacation days at your organization, but it means nothing if the staff culture discourages use of time off. Employees that have time off for family, creative pursuits, travel, or to simply do nothing at all will be healthier, happier, and bring more back to your organization. In this way, gratitude is a regular combination of listening, recognition, acknowledgement, and action. Say "thank you" over and over again — and mean it.

4. PROVIDE CLARITY ON TYPES OF POSITIONS

At NBNC, part of the policy revamp involved classifying each employee, determining whether they were hourly or salaried, full-time or part-time, school-year,

and exempt or non-exempt. Before doing this, employee classification was murky, leading to equally murky understandings of time off, flex time, accrual, pay, and more. This was the hardest part of the revamp, especially because it meant treating different types of employees differently, which is challenging at an organization that values equality. In the end, especially after new letters of hire and individual conversations to go over the details for everyone, it led to a collective sigh of relief, not to mention practices better in line with labor laws.

5. MATCH POLICIES AND BENEFITS TO POSITIONS

NBNC, like so many nature centers, has staff doing wildly different jobs, ranging from full-time and part-time administrators, to preschool teachers, to summer camp staff. Before this revamp, benefits and policies were applied the same across the board, without regard to position differences. By carefully considering staff rhythms, NBNC crafted policies and benefits that actually varied from job to job, thus better supporting staff schedules and improving sustainability and morale. For example, since the organization's fiscal year starts January 1st, preschool teachers did not accrue enough PTO to take time off during a February break. So, NBNC moved preschool teachers onto a school-year schedule, with their time off matching the school calendar, rather than accruing from the start of the fiscal year. These structural changes made a huge difference in staff feeling understood and valued.

ADDITIONAL PERSONNEL POLICY CHANGES

In addition to other changes mentioned in the article, NBNC and TNM also implemented these updates:

North Branch Nature Center

- started retirement accounts
- added two holidays
- accelerated our leave accrual ladder
- doubled sick leave
- added personal days for school-year employees
- changed the flex time system
- added unpaid leave
- continued health insurance through the summer for school-year employees
- changed the program fee waiver system
- added a merchandise discount
- added 17 other new policies, covering things from work locations to social media to voting

The Nature Museum

- moved from a combined PTO policy to separate sick time, vacation time, and holiday time (as well as made each more generous and flexible)
- made the language more gender inclusive
- updated the healthcare benefit policy
- updated language around drug and alcohol use to reflect Vermont's laws
- considered the impact and practicality of "confidential" salaries
- clarified what roles the Executive Director and the Board of Directors have around the hiring and review of employees

Updating your own personnel policies

We suggest working with an HR professional during the process who can research potential new benefits, compare policies to state statutes, and add HR language. In addition, we found it helpful to start a document of future changes right away, to make the next revamp all the easier.

There are many dimensions to consider when reviewing personnel policies and benefits at your organization, and because every organization will have different needs, there is no "one-size fits all" solution. We feel these five principles are a great way to start your personnel policy overhaul by putting staff first. We encourage you to reach out to colleagues and other nature centers for help and advice. And remember, you're not alone! 🌱

The entrance to The Nature Museum's building in Grafton, Vt.



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Cultivating Shared Leadership

Glenna Holstein, Independent

Mike Larson, Executive Director of the Blue Lotus Center in West Bend, Wisconsin

Glenna Holstein and Mike Larson are both ANCA members based in Milwaukee, Wis. They met 15 years ago working together at the Urban Ecology Center in Milwaukee, where they became fast friends as they connected over shared values and curiosity about how to become the best leaders they could for their respective teams (and arguably over their shared nerdy sense of humor). A decade and a half later they still love geeking out about ideas and practices of shared leadership. Glenna and Mike led a session on shared leadership at the 2023 ANCA Annual Summit; this article summarizes what they discussed in the session.

Below: Glenna Holstein and Mike Larson's session on shared leadership at the 2023 ANCA Annual Summit at The Ecology School in Saco, Maine.



Cultivating Shared Leadership (cont.)

Ask a room of 30 people what makes a good leader, and you might get 30 different answers.

That's one of the things that makes leading a team so tricky: different people value different things. As capable and intentional as you might be, it can feel truly impossible to be the "right" leader for everyone. It's a pretty intimidating prospect, when you think about it! Having to be everything to everyone, see things from all angles, make all the decisions, as just one person?

Here's the good news: we're convinced that you don't have to do it all. In fact, it can be more effective, more fulfilling, and more motivating when you share leadership on your team.

Why shared leadership?

We could literally talk all day about why we love shared leadership, but the basic summary is this — sharing leadership on your team:

- Makes your job easier (you don't have to make all the decisions by yourself!)
- Builds trust and buy-in among your team (if you're making decisions together, everyone has a say and a stake.)
- Makes your decisions better (you get multiple perspectives and often come up with ideas you couldn't come up with on your own.)
- Builds new leaders (everyone on your team will be gaining the skills they need to lead, both on your team and in any future role they may have.)
- Makes everything more fun! (this is subjective, but we definitely think so!)

Types of Team Structures

HIERARCHY & CREWS

Many of us are familiar with the traditional corporate hierarchy prevalent in most organizations. Small-

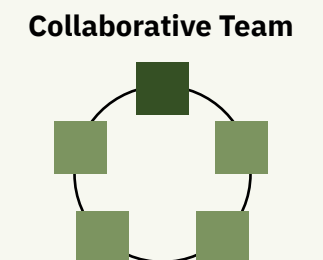
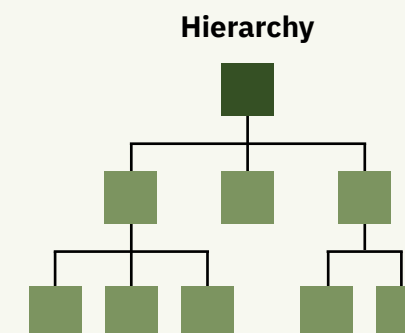
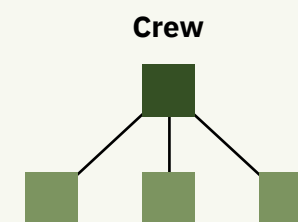
er organizations might get away with more of a "crew" model: a number of employees reporting to one boss or director.

While both of these models can be effective, they also have significant weaknesses. Have you ever been frustrated by a decision made up the corporate ladder that didn't make sense to the front line staff who had to implement it? Or, have you ever had a supervisor who faced problems outside of their depth that they didn't know how to handle? Both of these problems stem from a model of leadership that concentrates decision-making power and authority in one person. As long as that person is competent, benevolent, and well informed, everything seems to go fine and they often get a lot of credit. However, when they make a mistake, they also receive all the blame.

COLLABORATIVE TEAMS

Hierarchies are not the only way to organize. In a collaborative team model, a group of people work together to make decisions, prioritize workstreams, and assign tasks. In this model the leader does not hold the power, they hold the space — acting more as a facilitator of the conversation than the boss.

Mike: This style of leadership was modeled for me by my first real mentor. Whenever I came to her with a question or problem she would always respond by asking: "what do you think you should do?" This simple question shifted the power dynamic in our relationship. I quickly learned to come to her with solutions, not just problems, and she empowered me to have agency and take responsibility for their actions. When I became a manager myself, I was able to apply that same strategy with my team. Whenever a question or problem would arise, we would bring the team and I would ask "what do you think we should do?" It was cool to see many brains coming together to meet the challenge and often the solutions they came up with were way better than I would have come up with on my own.





Cultivating Shared Leadership (cont.)

This type of dynamic just doesn't happen organically. It requires intentionality and a foundation of trust built over time, especially if transitioning from a traditional hierarchy or crew style model. Fortunately, there are a number of tools to help facilitate a highly effective and collaborative team. Two models/resources we have found useful in developing our own sense of organizing teams are Teal Organizations and Sociocracy.

TEAL ORGANIZATIONS

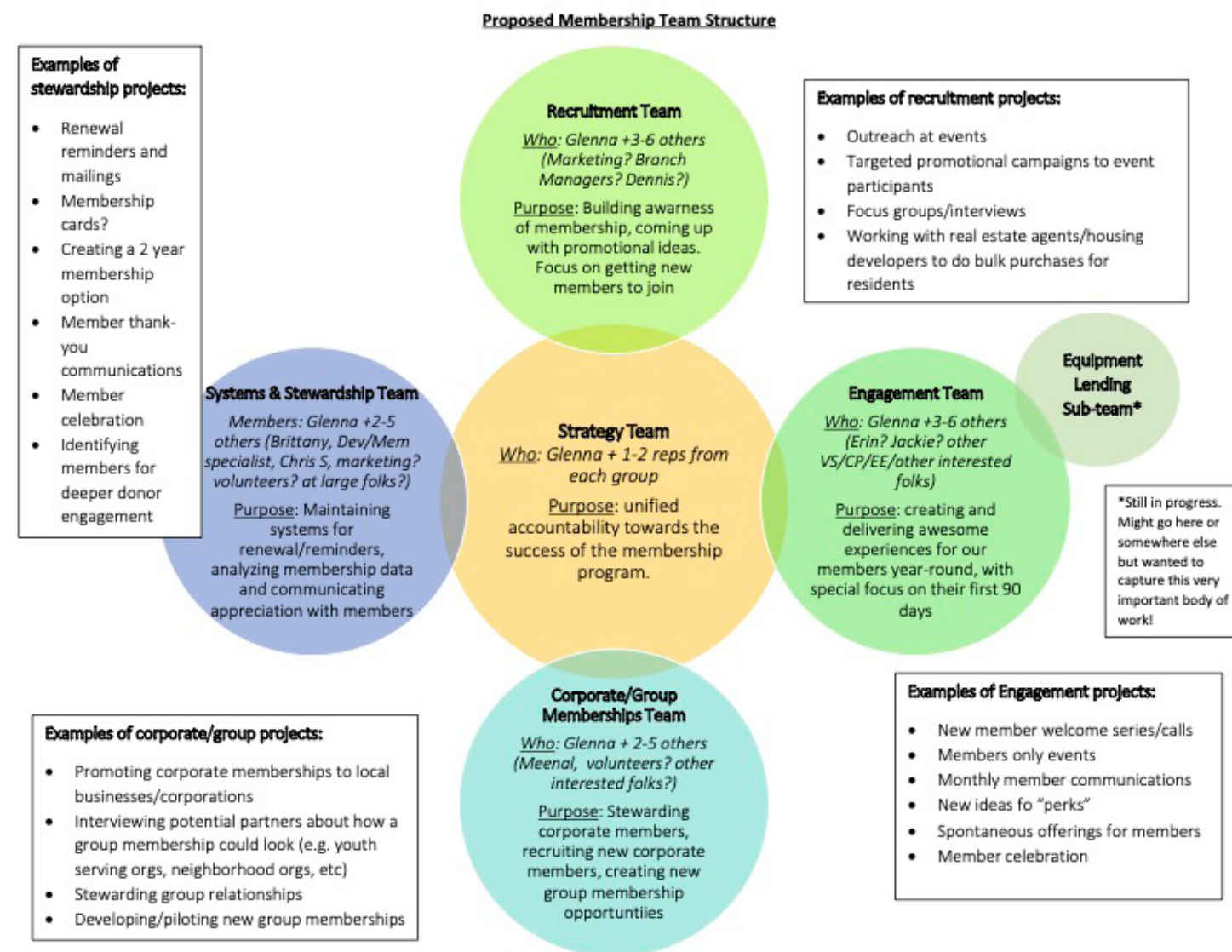
A “Teal” organization is loosely modeled after a living organism, focusing on **self management** (high autonomy, strong peer relationships, power embedded throughout organization), **wholeness** (creating an environment where people can bring their whole selves to work), and **evolutionary purpose** (defining purpose of work is a process of observation, exploration and discovery in which everyone participates). For more on Teal organizations, see the book “Reinventing Organizations” by Frédéric Laloux.

SOCIOCRACY

Sociocracy is a system of dynamic governance that aims toward equitable, efficient, and collaborative decision-making. One of the major principles of sociocracy is organizing work and teams in “circles” –each of which is a group with decision making authority in their own area (for decisions which affect other areas, they must involve other circles in the decision).

Key elements of **the circle structure** are that each circle has a facilitator and that the circles are “double linked” going outward from the center — each link represents two people who are part of both the inner and outer circle, to ensure information flows between

Cultivating Shared Leadership (cont.)



Glenna: In one of my previous roles, I experimented with organizing my team in circles, as seen above. This structure worked well for me because I was doing membership work that needed engagement across the organization but I was technically a department of one. The circles allowed me to involve and empower folks with different areas of expertise in different areas of membership, while promoting a flow of information among areas and ensuring cohesion via the central strategy team.

circles and that decisions are not made without the voice of adjacent circles being present.

How to make decisions as a team

No matter how you decide to organize your team (or whether your team’s structure is predetermined by your organization), you will need to figure out how your team makes decisions together in order to effectively share leadership.

CHOOSE YOUR STYLE

There are many decision making styles, but a good way to get a sense of the range is to think about “directive” decision making (one person makes the deci-

sion and hands it down to the team) on one end of the spectrum and “consensus” decision making (decision made by mutual agreement of all parties) on the other end. Directive decision making has the benefit of being quick and clear, but it can also have the downsides of having lack of team buy-in, and feeling frustrating. Consensus decision making has the benefit of buy-in and engagement, but can sometimes feel cumbersome as a process.

COLLABORATIVE DECISION MAKING

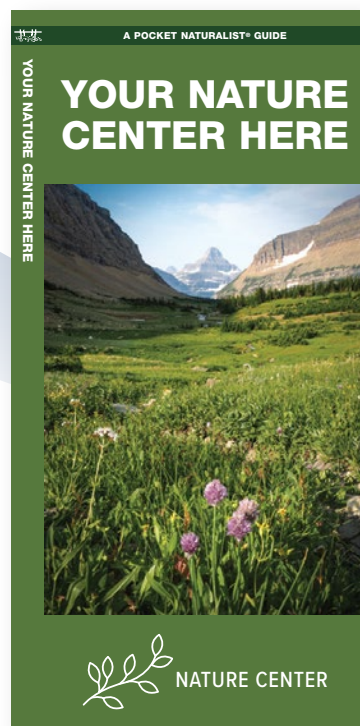
In our experience, a collaborative approach to decision making can help find the sweet spot between the two extremes. Essentially, this means working with



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your team together to “decide how we decide.” Together, your team will come up with clear guidance about what kind of decisions might be directive and who makes them vs. which ones will be made together as a group (and how you will walk through that process together), vs. which one might be made by one person with the input of others.

For example, decisions about safety need to be made quickly and will likely be made directly. Decisions about how to allocate budget among different needs within your team might be made together as a group. And decisions about a specific project someone on your team is working on might be made by one person with input from others.

CONSENT-BASED DECISION MAKING

One tool we have found particularly useful for making decisions as a team also comes from Sociocracy — it’s called **consent-based decision making**. When done well, this process gives everyone a voice without being too cumbersome.

The key to the process is the idea of the “range of tolerance.” Typically when making group decisions we come into the conversation aiming for our own personal preference. But in a consent-based process, we don’t ask “what do you prefer?” we ask “is this in your range of tolerance?” or “do you object?”

The distinction seems slight but to illustrate the difference it makes, take the example of trying to decide what to have for dessert. Imagine someone’s *preference* for dessert is chocolate ice cream, but their *range of tolerance* might be anything with chocolate in it. So by making that slight shift to “range of tolerance,” we give ourselves vastly

more area to work within to make our decision.

A consent-based decision-making process usually looks something like this:

1. Someone presents an idea or proposal to the group (may have been shared with group beforehand, depending on complexity)
2. Group has a chance to ask clarifying question
3. Group does a quick round for reactions. In sociocracy, a “round” is a specific tool: you go around the group in a circle and give each person a chance to speak in order before there is any cross talk. This balances introvert and extrovert communication styles and ensures that you hear from everyone.
4. Consent decision-making round: People can say “I consent” or “That’s within my range of tolerance” to consent to the decision, or “I object” if they have an objection. Note objections if there are any.
5. Integrate objections until the proposal is in everyone’s range of tolerance, or identify steps to get it there by the next meeting.

Your role as a leader in this model is to facilitate these processes, as opposed to being the one making the decision.

Glenna: I helped facilitate consent-based decision making for our organization’s COVID response team. While I initially worried that the “consent, object, range of tolerance” language and the rounds would feel onerous, it actually had the opposite effect. Once we had the shared language and understanding, we could actually make decisions more quickly. We came up with a color-coded shorthand for “preference” (green), “range of tolerance” (yellow), and “objection” (red). We could often do a really quick visual poll on the zoom screen (we each had colored pencils or scraps of paper that we would hold up) to see how close we were to consenting on a decision.

The staff of the Blue Lotus Center in West Bend, Wis.



From decisions to process

Whatever guidelines and processes your team comes up with, the main point to remember is that your decision-making has to be intentional and inclusive. As a leader you are shifting your role from being the one who makes all the decisions to the one who holds a space for the process. Will your team decide to do things you wouldn’t have decided on your own? Absolutely. Will that be uncomfortable sometimes? For sure. Will there also be times where you are amazed and delighted by the things your team comes up with that you never would have thought of by yourself?

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Additional Resources:

[The Future of Management is Teal](#)
An introduction to Teal Organizations.

[Reinventing Organizations Wiki](#)
A site based on the book “Reinventing Organizations” by Frédéric Laloux.

[Sociocracy – Basic Concepts and Principles](#)
An introduction to Sociocracy.

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The First Hour of Team

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Background on Teams

Teams can be effective tools to reach better decisions, encourage inclusiveness, and generate a positive workplace culture (Benishek & Lazzara, 2019). Teams can also be sources of stagnation, frustration, and low productivity (Robbins & Finley, 2000). This article describes a set of focused and structured activities for a healthy and productive team to practice and complete before the team tackles a task or goal.

What is a team?

“We all work as a team around here” is a common phrase heard in many organizations, but what does that mean? Often the phrase is an expression of desired culture rather than

reality. The phrase could represent values of respect, open communication, and collaboration that are necessary components of team, but by themselves, do not guarantee team success. A collection of individuals in an organization can hold to and express values of team-like behavior but not necessarily function as a team.

Team-like is different than *Team*. As an example, a year-long leadership program of selected individuals from across an organization participated in a variety of leadership development activities. The group developed strong core values during the program and a team-like atmosphere, but it was not until a final project was assigned that the collection of individuals became a team. Think of team as a functional and specific structure rather than as an assumed set of positive values and process.

Team Definition: A team includes individuals with a common purpose, process, and an intended outcome resulting from their work together.

Standing or ad-hoc committees, departments, and small groups could meet the definition of team. The leadership program participants became a team when the project was assigned because of two main criteria. One, the project required that all individuals in the program work on a single topic as one unit, and two, a final product was required within a given amount of time. A collection of individuals exercising team-like behavior now have the responsibility to develop into a team.

Why Teams Fail

Harvey Robbins and Michael Finley describe decision-making, empowerment, difficult people, and procedures as key factors that cause teams to fail. (Robbins & Finley, 2000). Patrick Lencioni describes trust, conflict, commitment, accountability, and results as key components of teams in trouble and in success (Lencioni 2005). The First Hour of Team details activities to build a new team or revitalize an existing team focusing on purpose, process, people, and product.

Left: Dr. Corky McReynolds speaks as part of the 2019 ANCA Annual Summit at Cincinnati Nature Center in Cincinnati, Ohio.

The First Hour of Team (cont.)

Purpose

Teams can fail, or at least flounder, when a clear purpose has either not been given, or has not been developed. The purpose cannot just be posted or provided verbally. The purpose needs to be described, discussed, and clarified so that all team members have a clear understanding of their charge.

Process

Groups of people tend to try and solve a problem when they first get together rather than to take time to develop their process on how to proceed. I once participated on a team that had started to brainstorm solutions to a perceived problem and at first it seemed an easy and short task. Hours later we were stuck, and our objective seemed to be out of reach. I suggested we pause and use a specific process to move us forward. The team leader responded, “We don’t have time for process.” Hours later and facing a deadline we finally had to force ourselves to a decision.

People

The same positive and core values held by the organization should serve as a foundation for how the team members are expected to work and relate to one another. Time must be dedicated to developing the team’s core principles as well as its own rules for engagement, interaction, support, and managing conflict.

Product

The outcome, the final deliverable, must be provided to and clarified for the team; it might sometimes be developed by and accepted by the team. All team members must have a clear understanding, defined role, and commitment to the product. For example, when I was asked to serve as a college level team leader, one of the first items of business was to have the person of authority clarify and specify what the outcome and in what form our deliverable was to be. Without this guidance the team most likely would have wandered off its path.

A Useful Tool: The Team Action Commitment

The first hour of any new or existing team should focus on establishing itself as an entity by clarifying its purpose, creating its process, supporting its people, and defining its product. Team charters can be effective tools to increase performance, productivity, and quality (Mathieu & Rapp, 2009). A powerful aid for developing and accomplishing effective team dynamics and higher levels of productivity is the Team Action Commitment (McReynolds, 2015). Completing the Team Action Commitment (TAC) results in deeper understanding, acceptance, and guidance for the team.

This article outlines the TAC as a tool for setting up and organizing new and/or existing teams. Accompanying TAC resources, including a practicable worksheet, are available by contacting the author (see end of article).

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The First Hour of Team (cont.)

Description:

- The TAC becomes the agreement of work among the team members and the sponsor. The *sponsor* is the person with authority who establishes the team.
- The TAC is designed to be internally facilitated by a member of its team, or a designated leader if one has been identified. An outside facilitator may be needed if the team already exists and has been experiencing difficulties.
- The TAC worksheet is used by the team to discuss and record its responses to a sequence of components.

There are three sections to the TAC.

Section 1: Establishing the Team

The first section establishes basic information about the team.

Date Established

Record the date the TAC was developed.

Team Name

Write the team's name. The team's name identifies this group, differentiating it from other groups within the organization. The name could be assigned by the sponsor, shortened from the purpose statement, or a representative creative name relevant to the purpose.

Team Purpose

Write a short statement defining the team purpose. It should establish why the team exists and what is expected of the team. The general purpose may be provided by the sponsor and may be clarified and sharpened by the team. E.g., "Our website task group will evaluate our company's current website and make recommendations for better client interactions."

The First Hour of Team (cont.)

Team Leader

List the team leader. The team leader is the person asked by the sponsor to either chair and/or convene the team. If a sponsor convenes the team without a designated leader, then it is the team's responsibility to select a leader or co-leaders. This role does not require the leader to facilitate all meetings, but it does mean this person or persons are responsible to guide to success the team's purpose and TAC implementation.

Team Members

List the names/contact information of each team member. The team may seek outside expertise for specific information, but this individual does not need to be added to the team.

Section 2: Sponsor Information

The second section of the TAC focuses on the information that the sponsor *must* provide to the team. The team cannot decide these factors. The sponsor may not be aware of these factors when establishing the team, so the first task of a new team is to seek guidance on parameters and level of participation from the sponsor. Not knowing, understanding, or disregarding these two factors can result in team failure.

Parameters

Parameters are absolute boundaries that the team must work within. If a sponsor declares there are no boundaries, then the team must define and perhaps give examples to the sponsor. They may be few, but boundaries must exist. Examples of boundaries might be personnel, fiscal, policy, or mission.

Level of Participation

At what level of work is the committee operating? What becomes of the completed task? The sponsor must be clear for the team to be successful. There are three common levels of team participation:

Recommendations: The team has the responsibility to make recommendations to the sponsor. The team has no direct responsibility once the recommendations have been submitted. The recommendations may or may not be implemented.

Decision: The team has the responsibility to complete the task, make a decision; and is responsible for implementing the results. The team has the authority and access to resources to carry out its decision. This does not mean the team decides in isolation but should be in communication with the sponsor, other staff, and teams.

Recommendations-Implementation: The team has the responsibility to provide recommendations, which after review from the sponsor and perhaps others, may be asked and given authority, to carry out the implementation of the results.

Deliverable

The deliverable is the expected product from completing the purpose. Is it a manual? A report? The sponsor may or may not have a clear vision of what the deliverable should be so the team may need to clarify. Key information includes:

Deliverable To: Identify and write who the team is reporting and submitting the deliverable.

Deliverable Due: Identify and write the date the team is expected to complete its deliverable.

Section 3: Team Responsibilities

The third section focuses on what the team is responsible for deciding about and committing to as part of their working together.

Protocol

Identify and list the team's self-developed rules of working together (also known as norms). These self-identified and accepted rules for expected behavior are used to help the team stay on track and create a positive team dynamic with mutual respect and inclusion. Meeting facilitators use the team norms to protect individuals and the process. Common examples include 1) Start and end the meetings on time, 2) respect all member's opinions, 3) one person talks at a time, etc. The list should be visible during team meetings. New suggestions can be added at any time.

Type of Decision-Making

Brainstorming ideas is easy, but how are decisions made within the team to reach closure with a topic, recommendation, or change in the process? Identifying how the group is going to make decisions is a critical factor to secure support, inclusion, and better results. Choose and write the preferred type or types of process the team will use to reach its decisions. Common types include informed majority, consensus, unanimity, and weight/rank.

Informed majority: Team discussions are open, inclusive, and informative reaching a point whereby a vote on a final decision is determined by a majority vote.

Consensus: Same level of discussion as informed majority but instead of a yes/no vote, consensus means everyone supports the results. Consensus is achieved when a decision is to be made and either

situation occurs. Either all indicate full agreement and full support (thumbs up), or all may not fully agree and will fully support the decision (thumbs sideways). Any member indicating no agreement and no support means the team has not reached consensus (thumbs down). Discussion continues until a “thumb down” becomes at least a “thumb sideways.” Consensus does not take as long as it may appear as long as proposals are not offered until all information and discussion has been shared.

Unanimity: All must agree and support the decision (all thumbs up). Often a team misinterprets the difference between consensus and unanimity thinking it needs unanimity when consensus is really the goal. Reaching unanimity does take longer and is usually not recommended for team decision-making. Unintended peer pressure could result in quick unanimity however one or more team members may not actually have reached that level of agreement.

Weight/rank: A tool that teams can use to identify and prioritize their results is a method that is used to help reach a final decision. A simple and very effective weight/rank tool is 10/4. The team has a list of items. Each team member has 10 votes to distribute to the items on the list but cannot place more than 4 votes on any one item. The result is a rank, and the top ranked item is commonly accepted as the priority. Next, consensus is used to demonstrate agreement and support of the results. See facilitation literature for more information.

Communications and Connections

Determine and list appropriate levels of communication with others that the team should include to complete its purpose. When individuals or teams are identified they should be contacted to ascertain their desired level of communication and connection. This usually refers to other teams or individuals in the organization or contacts outside of the organization.

Inform: The team needs to simply keep others aware and knowledgeable about its progress and activities.

Input: The team seeks information and opinions from others. Those providing input clearly know in advance, from the team leader or delegate, that their input is advisory and may or may not be used.

Involvement: The team seeks information and action where the participant is also a part of the decision-making outcomes.

Roles

Determine and list the various roles of the team members. Common roles include Leader/Chair, Meeting

Facilitator, Record Keeper. It is recommended the roles of meeting facilitator and record keeper should be rotated through all members of the team. Other roles may be needed and identified by the team.

What's Next?

Every meeting needs to end with a clear next set of steps to take. Identify actions individual members are assigned, a probable next team meeting agenda, and any other details that help establish a team memory. Write the next steps the team will take, and by when.

Summary

The TAC is a tool for establishing focus on the people, the process, and the product that teams are designed to achieve. Admittedly, the initial development of the TAC may require more than one hour; however, the time devoted to the task will pay off over the life of the team. Observation of a team that developed and used the TAC indicated that the team was notably more productive with stronger team coherence than a team that developed but then did not follow its TAC. When developing the TAC keep the task of developing the TAC simple so that implementing the TAC receives total buy-in from the team members. Developing the TAC in the first hour of team helps ensure productive results with full team support. 🌱

For the TAC worksheet, example, and section descriptions contact Corky McReynolds: corky@leadteamconsulting.com

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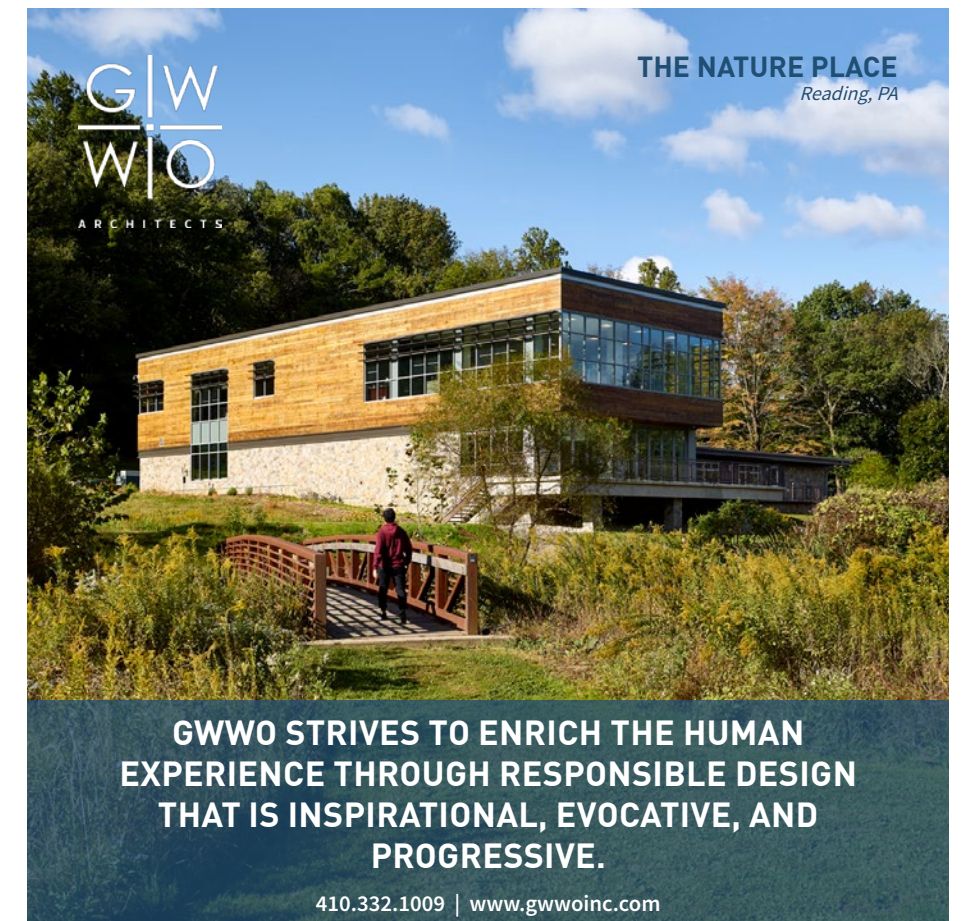


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