

# DRAFT

*Comments welcome*

## **Sierra Club**

### **Chapter Conservation Program Governance**

#### ***Options for the Maryland Chapter***

#### **Conservation Governance Task Force**

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***Under Review - Not for Citation***

The findings, interpretations, and conclusions expressed in this paper are those of the Task Force members and should not be attributed to the Sierra Club organization, including the Maryland Chapter of the Sierra Club. The Team would like to extend its deep appreciation to the dedicated volunteers and staff in the Maryland Chapter and the fifteen other Chapters across the country who took the time to answer our questions and meet with us in an effort to better inform decisions on the governance of the conservation program in Maryland and bring more evidence to bear on the Sierra Club's Chapter conservation programs more generally.

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# I. Introduction

This report presents the findings and recommendations of a Task Force charged with conducting an evidence-based review of the governance of the Maryland Sierra Club Chapter's Conservation Program. The report draws on data collected from leaders and activists in the Maryland Chapter and an analysis of Conservation Program governance of 15 Sierra Club Chapters, to distill lessons from their experience to help improve the accountability, transparency, and effectiveness of its Conservation Program.

## Sierra Club Chapter Conservation Programs

According to its articles of incorporation, the Sierra Club's purpose is "to explore, enjoy, and protect the wild places of the earth; to practice and promote the responsible use of the earth's ecosystems and resources; to educate and enlist humanity to protect and restore the quality of the natural and human environment; and to use all lawful means to carry out these objectives."<sup>1</sup>

There are 64 Sierra Club Chapters nationwide that pursue this purpose through their grassroots, democratic, member-led governing framework set forth in Chapter bylaws and associated standing rules. Each Chapter's elected Executive Committee (ExCom) is required to adopt a Conservation Program in order to "further the conservation objectives and priorities of the Club within Chapter boundaries, assist in international, national, and regional Club actions, and provide for the development and execution of specific conservation strategies and action programs authorized by the ExCom."<sup>2</sup> The ExCom is also required to appoint a Conservation Chair to "provide a point of contact for the public and other Club leaders, and assist the ExCom in conservation planning, budget decisions, resolving conflicts, training, and implementation of the Conservation Program."

Chapter bylaws highlight the minimum required elements of a Conservation Program, but are silent on the structures and processes necessary to achieve them. The required elements are:

- "an opportunity for groups, sections, other chapter entities, and individual members to become involved in conservation activities"
- recruitment and training of activists "to develop the necessary skills and judgment, for publication and discussion of conservation issues, and for networking and alert systems"

Beyond this, the Conservation Program must be coordinated with other Club entities and conservation actions may not include civil disobedience.

Although Chapter bylaws do not prescribe any particular structure for organizing or implementing the Conservation Program, they do authorize the ExCom to make rules and regulations for carrying out the provisions of the bylaws (bylaw 3.2), and to establish and dissolve Chapter standing and special committees whose members are Chapter members appointed by the Chapter Chair, subject to ExCom approval (bylaw 3.7). The Chapter bylaws template does not explicitly require or propose a Conservation Committee, but the ExCom has the authority to create one.<sup>3</sup>

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<sup>1</sup> <https://www.sierraclub.org/policy>

<sup>2</sup> The requirements for the Conservation Program, including the appointment of a Conservation Chair, are contained in bylaw 5.3 of the Chapter bylaw template, applicable to all Sierra Club Chapters, including Maryland..

<sup>3</sup> In a departure from the template, the Michigan Chapter incorporated into their bylaws that "The Conservation Chair will head a Conservation Committee."

## Maryland Sierra Club’s Conservation Program

The impetus for this study was a request from Club leaders at the December 2019 Chapter Conservation Committee meeting for greater guidance on the structure and operation of Issue Committees. The departure of the Chapter’s Conservation Co-Chairs in May 2020, after the early conclusion of Maryland’s General Assembly and during the lull in activity due to the covid-19 pandemic, provided a window of opportunity to pause and consider evidence from the experience of other chapters with their models of Conservation Program governance.

As of November 2020, the Maryland Sierra Club had 17,737 members and ten local Groups. Over the past five years, two Conservation Chairs and two Conservation Co-Chairs have led its Conservation Program.

- The Chapter’s Conservation Program has been operating under a standing rule approved by the Chapter ExCom in December 2014.<sup>4</sup> Key components of the program included a Chapter Conservation Committee with 3-7 members appointed by the ExCom, and Issue Committees, Campaigns, and Issue Contacts appointed by the Conservation Committee.
- From April 2017 to March 2019, the Conservation Chair position was vacant and the Conservation Committee did not meet.<sup>5</sup> However, Issue Committees and Campaigns continued to meet, promote their objectives, implement their plans, and successfully lobby for legislation.<sup>6</sup>
- During 2017-18, a team of volunteers and staff met to “resurrect” the Conservation Committee, producing a 2-page document of Conservation Committee Governing Principles in December 2018.<sup>7</sup> These principles expanded the voting membership of the Conservation Committee and reduced the scope of its activities relative to the 2014 standing rule. They required that Issue Committees develop annual goals and work plans and that each Committee designate a member to welcome new activists. However, they offered no new guidance on governance or structure of the Issue Committees.
- In March 2019, the Chapter ExCom appointed a new Conservation Chair and Vice-Chair. ConsCom meetings were held quarterly, beginning March 2019. The updated ConsCom had a much larger voting membership – Issue and Campaign Chairs, representatives from nine Groups, and the Legislative Chair – all appointed as ConsCom members by the Chapter ExCom. It also had a much narrower remit – mainly to exchange information and to coordinate goal setting and planning. The ConsCom successfully produced conservation plans for 2020 in the fall of 2019. However, the lack of governance structure and support needs for the Issue Committees had still not been addressed and the Conservation Co-Chairs stepped down in May 2020.

This rest of this report is organized as follows. After a brief review of the study’s methodology in the next chapter, it provides an overview of the elements of Conservation Program structures found in the 15 Sierra Club Chapters studied, followed by an analysis of each component

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<sup>4</sup> “Conservation Committee Guidelines for the Maryland Sierra Club – December, 2014: Structure, Organization, Operating Processes & Coordination (v3.4)”. See Appendix B.

<sup>5</sup> The Conservation Chair officially stepped down at the end of February, but because this was in the middle of the legislative session and there was no immediate successor, she continued the functions until early April.

<sup>6</sup> Significantly, in Spring 2019 two Sierra Club priority bills passed - the statewide expanded polystyrene food container ban and the Clean Energy Jobs Act - based on major efforts by the Energy and Zero Waste issue teams, despite the absence of a Conservation Chair and Conservation Committee.

<sup>7</sup> “SC MD Conservation Committee Governing Principles – FINAL,” December 5, 2018. See Appendix B.

of the main structures – the Conservation Chair, Conservation Committee, and Issue Entities. For each of these entities, we review Sierra Club’s guidance (formal and informal), the governance structure and evidence for the Maryland Chapter, and the experience of other Chapters. The final chapter points to the main conclusions and specific recommendations to improve the governance and effectiveness of the Maryland Chapter’s Conservation Program.

There are three Appendixes that are useful references, as some of the tables were too large to put in the main report. Appendix A contains the list of people consulted. The Maryland Chapter’s two most recent governance documents are in Appendix B, along with side-by-side presentations that allow easier comparison. Appendix C contains tables comparing the features of Issue Teams and Subject Matter Experts across the 15 Chapters.

## II. Methodology

In May 2020, the Maryland Chapter Executive Committee approved unanimously a 3-person Task Force, supported by the Deputy Director, to review the governance of the Maryland Conservation Program and learn from the experience of Conservation Program governance in other Sierra Club Chapters.

This review draws from evidence on the functioning of the Maryland Chapter’s Conservation Program and from Conservation Programs in 15 Sierra Club Chapters of similar size (Table 1), roughly a quarter of all Sierra Club Chapters nationwide.

**Table 1. Participating Chapters**

Chapter	Members	Chapter	Members
Colorado	24,477	North Star (MN)	20,679
Grand Canyon (AZ)	17,566	Ohio	24,375
Loma Prieta (CA)	17,151	Oregon	22,891
Massachusetts	25,407	Redwood (CA)	11,672
Michigan	24,286	San Diego (CA)	15,183
Mother Lode (CA)	19,940	Virginia	20,643
New Jersey	22,183	Wisconsin	20,296
North Carolina	22,095	<b>Maryland</b>	<b>17,737</b>

*Note: Members as of November 2020.*

Information from the 15 Chapters was collected in two Rounds. In Round I, each Chapter completed a questionnaire that documented the current governance structure. The respondent was from one or more of the following categories – the Chapter Director (staff), the Chapter Chair, or the Conservation Chair (or Co-Chairs). In addition to completing the questionnaire, the respondent was asked to provide any standing rules pertaining to the governance of the Conservation Program.

During Round II, the Task Force conducted follow-up interviews via Zoom to discuss with the Conservation Chair, Chapter Chair, and/or the Director of 12 of the 15 Chapters the strengths and

weaknesses of each Chapter’s structure and the lessons learned about each of the elements.<sup>8</sup> Altogether, the Task Force interviewed 26 volunteer leaders or staff in the 15 Chapters – eleven Conservation Chairs, eight Directors, six Chapter Chairs, and one ExCom member. A list of those consulted is in Appendix A.

A list of the evidentiary “building blocks” collected by the Task Force for the review is provided in Box 1. Several of the intermediate outputs from the Maryland Chapter have been written up separately and are available for review.<sup>9</sup> The tabulations of results from the 15 Chapters are presented in the body and annexes of this report.

<b>Box 1. Building blocks for the Conservation Governance Review</b>	
<b><u>Maryland Chapter</u></b>	<b><u>Other Chapters</u></b>
<ul style="list-style-type: none"> <li>• Survey of Conservation Committee members</li> <li>• Survey of Group Reps to the ConsCom</li> <li>• Survey of the Health of Issue Teams</li> <li>• Content Analysis of ConsCom minutes (2019-2020)</li> <li>• Analysis of ExCom minutes (2014-2020)</li> <li>• Analysis of 2014 and 2018 MD Chapter Governance documents</li> <li>• Interviews with past Conservation Chairs</li> </ul>	<ul style="list-style-type: none"> <li>• Survey of the Structure of the Conservation Program (Chair, Committee, Issue Subcommittees, Issue Experts, Conservation Staff)</li> <li>• Collection and review of standing rules and other Governance Documents</li> <li>• Interviews via Zoom of Chapter Leadership on the Effectiveness and Lessons from the Conservation Program Structure</li> </ul>

### **III. The Structural Components of Conservation Programs**

The Conservation Programs of the 15 Chapters featured some or all of four main components:

- A Conservation Chair, appointed by the Chapter ExCom but not necessarily an ExCom member
- A Conservation Committee, either a Chapter standing committee for which members are appointed by the ExCom annually, or a less formal arrangement
- Issue Teams, Committees, Sub-Committees, and Campaigns with different levels of formality, mainly with the task of identifying, analyzing, and proposing a response on a particular issue
- Issue experts, advisors, or coordinators who operate individually as “go-to” experts on specific issues, monitoring developments on their issue when there’s no committee or campaign.

<sup>8</sup> The North Star, Ohio, and San Diego chapters could not be reached for the follow-up interviews.

<sup>9</sup> The following analyses of survey results in the Maryland Chapter are available for review: “ConsCom Performance” (Results of the ConsCom Survey); “The Perspective of Group Representatives to the ConsCom” (Results of the survey of Group Representatives to the ConsCom); and “Survey of Maryland Sierra Club Issue Team and Campaign Chairs, October 2020.”

All of the 15 Chapters but one (Oregon) have issue-level entities, either Issue Committees, Issue Experts/Advisors, or both (Table 2). This shouldn't be too surprising because it's at that level that much of the strategizing and action on the ground takes place on conservation issues of interest to the Club.

Two-thirds of the chapters had Conservation Committees that operated as standing committees of the ExCom. The other third had informal Conservation Committees (Grand Canyon, Virginia), no Committee (Massachusetts, Wisconsin) or an alternative structure (North Star). Not captured by the table is the fourth component of conservation programs – the Conservation Chair. Two chapters were operating without a Conservation Chair (one due to a vacancy and one due to extended absence). As of the time of this report, the Maryland Chapter had both a formal Conservation Committee and Issue Teams/Campaigns, but the Conservation Chair role was vacant.

**Table 2. Structural Components of Chapter Conservation Programs**

Chapters	ConsCom	Issue Teams/ Committees	Subject matter experts
Mother Lode	√	√	√
Ohio, Redwood	√	√	informal
Colorado, N. Carolina, San Diego, Loma Prieta	√	√	
Michigan <sup>a</sup> New Jersey <sup>b</sup>	√		√
Grand Canyon	Informal	√	√
Virginia	Informal		√
Massachusetts		√ <sup>d</sup>	√
Wisconsin		√	
Oregon	√ <sup>c</sup>		
North Star	Coordinating Committee	√	Analysts/ Researchers

a. The ConsCom standing rule recognizes issue subcommittees, but there's no structure mentioned. Most issues are run by staff; informal groups of a handful of volunteers study issues for which there are no staff assigned, but not as a subcommittee, though there have been subcommittees in the past. b. The ConsCom is a standing committee with no issue committees. there are two other standing committees, on Transportation and Environmental Justice, that report directly to the ExCom, in parallel to the ConsCom. c. The ConsCom is led by a staff Conservation Director. d. There are also standing committees on Energy and Transportation that report directly to the ExCom.

The main structures of Conservation Programs are run by the volunteer leadership (Conservation Chair, Conservation Committees, Issue Teams), but many chapters also have staff whose jobs are to organize, coordinate, or advise parts of the conservation program.<sup>10</sup> The number of staff already working on an issue, either as an expert or as an organizer, can affect the scope and opportunities for volunteer leadership and structures that support it.

The number of staff dedicated to the conservation program among the 15 chapters varies, from none in four chapters to seven in two of them (Table 3). Staff positions fell into three

<sup>10</sup> Respondents were asked whether the Chapter has dedicated staff for specific conservation issues or to manage the conservation program. If so, they were asked to list these conservation staff by job title. For most of the responses, we were not able to distinguish Chapter staff from National staff, so have included all of the staff positions provided by the respondent.

categories: job titles with specific conservation issues (9 chapters);<sup>11</sup> those indicating broader involvement in the conservation program (10 chapters);<sup>12</sup> and those that were more generic but who the respondent indicated were working on conservation issues (4 chapters).<sup>13</sup>

**Table 3. Distribution of Chapters by the Number of Conservation Staff**

Conservation Staff (#)	Chapter
None	Colorado, Mother Lode, New Jersey, Redwood
1-3	Loma Prieta, Massachusetts, North Carolina, Oregon, San Diego
4-6	Grand Canyon, North Star, Ohio, Wisconsin
7	Michigan, Virginia

The number of conservation staff may influence the degree of structure in the part of the conservation program that is mainly led by volunteers. Note, for example, that all four chapters with no conservation staff have a standing Conservation Committee, while Virginia, Grand Canyon, and Wisconsin, with more staff, either have no Conservation Committee or an informal one. To place the Maryland Chapter in the context of these other Chapters, it has one staff member with a specific conservation issue in her job title (transportation).

## IV. Findings

### The Conservation Chair

*“I look at my job as Conservation Chair, not as a doer, but as a facilitator and coordinator”<sup>14</sup>*

Among the six “Functions and Services” specified in Sierra Club Chapter bylaws that the Chapter must provide, the conservation service is the only one for which the Executive Committee is directed to appoint a member to be tasked. Chapter Bylaw 5.3 requires that the Chapter ExCom appoint a Conservation Chair with two responsibilities (Box 2).

**Box 2: Responsibilities of the Chapter Conservation Chair in Chapter Bylaw 5.3**

- “provide a point of contact for the public and other Club leaders;” and
- “assist the ExCom in conservation planning, budget decisions, resolving conflicts, training, and implementation of the Conservation Program.”

<sup>11</sup> For example, Forestry Policy Specialist, Energy Program Coordinator, Coastal Conservation Program Coordinator, Beyond Coal Campaign, Stop the Pipeline Outreach Coordinator.

<sup>12</sup> For example, Conservation Assistant, Conservation Director, Conservation Organizer, Campaign Director.

<sup>13</sup> For example, Organizer, Engagement Manager, Volunteer Coordinator.

<sup>14</sup> Conservation Chair, North Carolina Chapter.



The responsibility to serve as a “point of contact” may not seem as too demanding, and “assisting” the ExCom may suggest a relatively limited role. But each of the elements – conservation planning, budget decisions, resolving conflicts, training, and implementation – is a potentially large topic. In practice, the interpretation of this bylaw has been far more expansive. Sierra Club’s job description for the Conservation Chair in *Campfire* (Box3) includes “to motivate and direct” a Conservation Committee, although Chapter bylaws do not mandate such a committee, nor do they require or recommend any particular structure for achieving the Conservation Program. Conservation Committees can involve coordinating a large number of members and issue entities. Taken to the limit, a volunteer for Conservation Chair could be taking on a full-time job (and then some).

### Box 3: Purpose and Responsibilities of the Conservation Chair (Campfire)

#### Purpose of Position

- To provide leadership, direction, and guidance on conservation issues for the chapter;
- To motivate and direct the Conservation Committee; and
- To appropriately delegate activities related to conservation to committee and other chapter members.

#### Responsibilities

##### **Leadership, Direction, and Guidance on Conservation Issues**

- Provide chapter leaders with a long-range vision of what the Club's conservation strategy and priorities should be over the next two to five years.
- Identify conservation issues needing attention and worthy of chapter consideration.
- Assist chapter leaders to develop conservation priorities.
- Design plans and strategies for current conservation campaigns.
- Report regularly on conservation committee activities to the chapter chair, executive committee, and other committees.

##### **Motivation, Direction, and Coordination of the Chapter/Group Conservation Committee**

- Oversee conservation committee activities to ensure that all needed tasks are accomplished.
- Direct and assist the committee to set goals and carry out objectives. - Coordinate main functions and campaigns of the committee.

##### **Delegation of Conservation-related Activities**

- Identify, recruit and challenge volunteer leaders.
- Identify individual members' abilities and interests and assign tasks appropriately.
- Train and assign volunteers to carry out conservation activities.
- Follow up assignments to be sure they are carried out.
- Thank volunteers and provide other rewards (social activities, public recognition) to ensure repeat performances.
- Prevent duplication of work by linking key individuals with one another.
- Challenge and encourage members to use their talents and skills to the maximum.

Source: <https://community.sierraclub.org/section/chapters/chapter-support-network/office-chapter-support/chapter-leader-resources/volunteer-job-descriptions#ConservationChair>

The Sierra Club’s guidance does suggest that the extent of involvement and responsibilities of the Conservation Chair will depend on the local context – the availability of volunteers and staff and the number and scope of conservation issues. It cautions that “A ‘one size fits all’ job description for a Conservation Chair is simply not realistic.”

## The Maryland Chapter’s Experience

The Maryland Chapter has had two Conservation Chairs and two Conservation Co-Chairs over the past six years, during which time the position was vacant for nearly two years (April 2017 – March 2019) and has been vacant since mid-May 2020.

It has not adopted any explicit job description for the Conservation Chair, beyond what is in bylaw 5.3 and the more detailed job description in Campfire. The 2014 Maryland Chapter Conservation Committee standing rule and the subsequent 2018 Governing Principles for the Conservation Committee focus mainly on the Conservation Committee and do not shed much light on the role of the Conservation Chair (Table 4). The lack of overlap in these two documents on the role Conservation Chair – except for their membership in a Conservation Committee – is noteworthy.

**Table 4. Tasks of the Conservation Chair in Maryland Conservation Standing Rules & Governing Principles**

2014 Standing Rule <sup>a</sup>	2018 Governing Principles <sup>b</sup>
<ul style="list-style-type: none"> <li>• “Questions about interpretation of policy [by the issue teams or campaigns] will be referred to the Chapter Conservation Chair.”</li> <li>• “...the Conservation Chair will incorporate conservation campaign budget requests [from each campaign] into the annual chapter budget process.”</li> <li>• “...applications for [Grassroots Network Team Grants] must be coordinated and vetted through the Chapter Conservation Chair so our collective experience with applications can be incorporated and multiple applications from the Chapter can be coordinated.”</li> <li>• Requests for conservation staff support should be communicated through Issue Committee chairs and the Conservation Chair.”</li> <li>• “One member of the [Conservation] committee is the Chapter Conservation Chair.”</li> </ul>	<ul style="list-style-type: none"> <li>• “The Chair’s tasks will be to coordinate, advise, and monitor the issue steering committees and campaign teams to ensure each one:               <ul style="list-style-type: none"> <li>○ functions effectively,</li> <li>○ works collaboratively with other steering committees, campaign teams, and Groups,</li> <li>○ develops annual goals and work plans, and adheres to national Club policies.”</li> </ul> </li> <li>• “The Conservation Chair ... shall participate in Chapter legislative activities as specified in the Chapter’s standing rules on state legislative activities.” (para 9)</li> <li>• “The Conservation Chair shall be an at-large member of the Conservation Committee.”</li> </ul>

a. “Sierra Club, Maryland Chapter Conservation Committee – December 2014: Proposed Structure, Organization, Operating Processes & Coordination”, approved by the Chapter ExCom December 19, 2014. See Appendix B.

b. “SC MD Conservation Committee Governing Principles – FINAL, December 5, 2018” See Appendix B.

In interviews, the most recent Conservation Co-Chairs identified their primary role to be the planning and convening of quarterly Conservation Committee meetings. The penultimate Conservation Chair prioritized support for issue teams and regular briefings to the ExCom on developments in the Conservation Program. All of the Conservation Chairs/Co-Chairs engaged in coordinating the annual discussion of goals and work programs.

The lack of clearly articulated responsibilities of the Conservation Chair can lead to confusion among volunteers and staff about whom to approach on a conservation issue and what kind of support they can expect.

## The Experience of Other Chapters

The expectations of Conservation Chairs are equally unclear in most of the other Chapters the Task Force interviewed.

**Responsibilities of the Conservation Chair.** Only two of the fifteen Chapters (Colorado and Virginia) had an explicit job description or list of responsibilities expected of the Conservation Chair. Twelve of the 15 Chapters did not have a specific job description and cited the boilerplate language of the bylaws. This included all five Chapters that have Conservation Committee standing rules.<sup>15</sup> As in Maryland, the standing rules tend to focus on the role of the Conservation Committee, not the expectations for the Conservation Chair. One Chapter cited the extensive job description from *Campfire* presented in Box 3.

The overall message from the survey is that there are very few Chapters with well-defined statements of the responsibilities of the Conservation Chair. Appendix Table C-1 tabulates what could be gleaned from survey questionnaires, Chapter documents, and interviews about the responsibilities of the Conservation Chair. Except for the responsibilities that are derived from the bylaws, the table is pretty thin. Five of the Conservation Chairs noted that they are not involved in the Chapter's conservation budget issues and two that they aren't involved in training. The responsibility for convening and chairing meetings, flagged by five chapters, is surely an undercount: In all of the Chapters with a Conservation Committee, the Conservation Chair is the one who convenes the meetings.

Despite the scarcity of information, there are some important delegations of responsibility to the Conservation Chair mentioned in at least a few Chapters:

- speaking for the Club on a conservation issue;
- recommending conservation priorities and flagging new issues needing an attention;
- monitoring, reporting, and coordinating implementation of the conservation program;
- coordinating the chapter position on new issues;
- assuring that public statements and initiatives are consistent with national conservation policies; and
- coordinating, advising, and monitoring issue committee and campaign teams.

**Feedback from Conservation Chairs.** The Conservation Chairs we interviewed came to the job, on the whole, with a long association with the Sierra Club and familiarity with the Club's policies and the Chapter's institutional history. Many of them had been in the job for a long time. Of nine Conservation Chairs interviewed who provided information, four had been in their position less than 5 years, four had been in the position 5-10 years, and one had been Conservation Chair for 20 years. Even the two Conservation Chairs that had been in their positions for less than two years mentioned decades of activism in the Sierra Club in different leadership positions before they became Conservation Chair.

Most respondents acknowledged the high expectations for the Conservation Chair and the problem of burnout. They shared the following perspectives and lessons on the role:

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<sup>15</sup> Michigan, New Jersey, North Carolina, Ohio, San Diego.

Dealing with all of the demands

- “Having a Co-Chair lessens the load and cushions the transition when there’s a change. You have to have some continuity.”
- “You just do what you’ve got time for...”

Why they stay in this position for so long:

- “...the burnout is spectacular, but I don’t really have anyone to replace me and if I don’t do it, my concern is that a lot of these things won’t be handled.”
- “I’ve been trying to get out of it for several years, but you need to know so much about the Sierra Club and about our policies, just to even qualify, and then to have enough time to do it. I have been trying to split the work with other people, which has worked successfully sometimes, but not always.”

Approach toward the role:

- “I see myself as just the coordinator.”
- “I look at my job as conservation chair, not as a doer, but as a facilitator or coordinator.” “I just want to see good things happen. And I don’t care about getting any credit whatsoever.”

Importance of recruiting the right person:

- “Our Chapter is careful about who is in what role... you don’t put someone in the role that’s going to cause contention or doesn’t do a pretty good job of understanding the issues.”

Finally, the respondents stressed the importance of recruiting someone with strong organizational and interpersonal skills, given that they are the point of first contact with the public and are involved in coordinating a lot of the teams. It can be helpful for the Conservation Chair to be familiar with conservation issues, but it is not a role for someone whose main objective is to promote their issue. One respondent offered that it’s important that the candidate understand that Issue Teams and other conservation volunteers do not “work” for the Conservation Chair or the ExCom. The role of the Conservation Chair is to support them to achieve their objectives and have an impact.

Two takeaways from this discussion are that: (a) Chapters have considerable flexibility in deciding which conservation responsibilities they want to delegate to a Conservation Chair and other entities in the conservation program; and (b) if a lot is expected from the volunteer Conservation Chair or Co-Chairs, it is incumbent to authorize structures that can share the burden and not pile it on one person.

## Conservation Committee

*“Organizers must be thoughtful and strategic about creating new teams. Teams are powerful when they are formed for a clear purpose. Teams can easily flounder if their purpose isn’t clear”<sup>16</sup>*

A Conservation Committee is one of the four common components found in Chapter conservation programs. While Sierra Club Chapter bylaws require a Conservation Chair, there is no requirement to establish a Conservation Committee. Nevertheless, the Maryland Chapter as well as five of the other Chapters in our sample have a standing rule explaining the purpose and operating rules for a Conservation Committee, which is a standing committee of the ExCom.

**Standing committees act in an advisory capacity to a governing body (the ExCom) and are appointed with specific objectives on designated subjects. Standing rules are adopted for the orderly and transparent administration of a standing committee or organization (Box 4).** However, a Conservation Committee does not need to be a standing committee; Chapter bylaws do not disallow formation of informal committees or teams by members with mutual interests to share information or engage in activities.

### Box 4: Sierra Club Bylaws, Standing Committees, and Standing Rules

**Bylaws on Chapter Committees.** According to Maryland Chapter bylaw 3.7, “The ExCom may establish and dissolve standing and special committees for such objectives as it may set. Subject to ExCom approval, the Chapter Chair shall appoint committee members from among Chapter members. The Chapter Chair, or another ExCom member designated by the Chair, may be designated as a voting member of each committee... Standing committees shall be appointed annually. ... the ExCom may add, remove, or replace members of any committee at any time.”

**Standing committees.** The Sierra Club doesn’t define the term “standing committee,” but numerous sources on the internet define them more generally as a permanent committee of a legislature or society that meets regularly to consider and recommend actions and propose policies in the functional areas under their jurisdiction, subject to the final approval of the governing body.<sup>17</sup> The standing committees in the Maryland General Assembly and in the US Congress are examples, but standing committees also apply to other types of organizations.

**Standing rules.** Robert’s Rules of Order explain standing rules as rules for the administration of an organization that are created by a majority vote and remain in force until repealed or annulled by a majority vote. The Sierra Club guidelines on Campfire explain them as rules below the level of the bylaws that can be approved by a majority vote of the ExCom; amended by a majority vote of the ExCom if prior notice is given or by a 2/3 majority without notice; and suspended for a particular purpose within a meeting by a majority vote.<sup>18</sup> With respect to committees, standing rules may include “definitions of committee structure, including the charges of the committees.” This is “where you can put the definition of the Conservation and Membership Committees.” Written standing policies can also be adopted and administered by a committee.

<sup>16</sup> Sierra Club, “Structuring Teams for a Purpose.” <https://community.sierraclub.org/section/chapters/office-chapter-support/chapter-leader-resources/conservation-chair-resources>

<sup>17</sup> See online definitions and examples by Oxford, Merriam-Webster, and others.

<sup>18</sup> <https://community.sierraclub.org/section/chapters/office-chapter-support/chapter-leader-resources/policies/chapter-and-group-bylaws/bylaws-standing-rule-elections-committee>

## Maryland's Conservation Committee over the past six years

To evaluate the functioning of the current Conservation Committee, it is important to understand where we've been before, especially in the recent past.

As of late 2014, the Chapter Conservation Committee was informal, not a standing committee of the Maryland Chapter. It met at least once per month. Meetings convened by the Conservation Chair were held at the College Park office in the morning on the same Saturday that the Chapter ExCom was meeting in the afternoon, convenient for those who wanted to attend both meetings, and allowing action on issues coming out of that morning meeting to be taken by the ExCom at the afternoon. The Conservation Chair invited anyone who wanted to get involved, have a discussion of an issue, or exchange ideas.

**2014 Conservation Committee Standing Rule.** During 2014, a consensus was reached among the Chapter volunteer leadership that it was time to clarify the purpose and organization of the ConsCom for greater transparency and effectiveness. One of the action items coming out of the Chapter's November 2014 Leadership Retreat was for the Chapter to adopt a standing rule on the mandate, composition, and procedures of the Conservation Committee.<sup>19</sup> Conservation Chair David O'Leary shared a draft based on consultations with others before and after the retreat, and was approved by the Executive Committee at its December 2014 meeting.<sup>20</sup>

The standing rule described four different entities within the structure: Conservation Chair; Conservation Committee; Issue and Campaign Teams; and Issue Contacts. The ConsCom was a Chapter standing committee for which the Chair and members were appointed by the ExCom. Other features included the following:

- A detailed statement on the purpose of the ConsCom: evaluating SC positions and priorities, coordinating Issue Teams, Groups, and allies; vetting emerging conservation issues; recommending funding and fundraising priorities to the ExCom; reviewing official comments sent to government agencies; participating in and joining coalitions; generating conservation program communications for members, decision-makers and the public; and recruiting, training, and mentoring Issue Chairs, Issue Contacts, campaign leaders, and activists.
- The ConsCom membership consisted of 3-7 voting members, including the Conservation Chair, with the option of the Chapter Chair joining as well. The Committee members were expected to represent the interests of Group conservation campaigns, Chapter issue committees, and national campaigns.
- ConsCom meetings were to take place at least nine times annually, open to all Sierra Club members. Two of the meetings were dedicated to in-depth planning and review,

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<sup>19</sup>Sierra Club Maryland Chapter Retreat, November 14-16, 2014: Action Items. As a result of this retreat, which had a focus on Chapter and Group governance, standing rules on both the Conservation and Legislative Committees were drafted and approved by the ExCom.

<sup>20</sup> "Sierra Club Maryland Chapter Conservation Committee – December 2014: Proposed Structure, Organization, Operating Processes, and Coordination (v3.4)." See Appendix B.

conducted jointly with the Chapter Legislative Committee, with representatives of Issue Teams and local Groups.

- The standing rule clarified the separate roles and interactions between Group and Chapter conservation programs and what types of support the Group programs could request from the Chapter.

The new Conservation Committee structure was launched in January 2015, under the continued leadership of Dave O’Leary and, in April 2016, by then-Legislative Chair Dori Paster, who served until April 2017.<sup>21</sup> The ConsCom consisted of about 5 voting members<sup>22</sup> and met every month or every two months, depending on the need. The ConsCom was a decision-making entity but also had a mission to help the Teams/Campaigns be as effective as possible.

- Each Committee member was assigned to be a liaison to one or two Issue teams/campaigns. The key feature was regular communication with each of those entities, support for addressing problems, and building leadership capacity.
- The ConsCom took responsibility for reviewing sign-on letters and letters offering comments on behalf of the Chapter to state agencies, and for coordinating the conservation program’s goals and work program across all of the teams/campaigns. The ConsCom was a decision-making body, with most decisions made on a consensus basis.<sup>23</sup>

There were two in-person meetings during the year to which all Issue Teams and Group representatives were invited: (1) a meeting in June after the legislative session for a debrief and discussion of the path forward; and (2) a December meeting at which all teams/campaigns finalized their annual plans.<sup>24</sup>

The 2014 standing rule – which also covered issues having to do with the purpose and creation of issue teams and campaigns (discussed later in this report) -- has never been repealed or annulled by an action of the Executive Committee.<sup>25</sup>

**The 2018 Conservation Committee Governing Principles.** From May 2017 – January 2019, the Chapter had no Conservation chair, and various members of the Steering Committee had moved out of state or had taken on other commitments without being replaced. However, the Issue Teams and Campaigns continued their work, including during the 2018 and 2019

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<sup>21</sup> The Conservation Chair officially stepped down at the end of February, but because there was no replacement and it was in the middle of the legislative session, she continued support until April, when the session was over.

<sup>22</sup> Source: Doreen Paster. In addition to Dori as the Conservation Chair, the ConsCom included Veronica Poklemba, Dave O’Leary, Chris Yoder, and Robin Lewis.

<sup>23</sup> We have not had the benefit of reviewing minutes from the ConsCom during this period. There were no “officers” to the ConsCom and no Secretary, but there were monthly reports to the ExCom on developments that are part of the ExCom minutes.

<sup>24</sup> Dori does not recall the role of Issue Advisors from the Standing Rule; they may have existed during her predecessor’s tenure (Dave O’Leary).

<sup>25</sup> Based on a review of ExCom meeting minutes, 2014-2019.

legislative sessions, in collaboration with the Legislative Committee. In 2018, there was renewed interest by some members in resurrecting a Conservation Committee with larger membership. They drafted a set of “Conservation Committee Governing Principles” for consideration by the Executive Committee.<sup>26</sup>

The Governing Principles document narrows the purpose of the Conservation Committee and greatly expands its membership, abandoning the “steering committee” model.<sup>27</sup>

- The specific responsibilities of the ConsCom are to:
  - “provide the structure for supporting and coordinating the issue and campaign teams, and help ensure those teams share information and work in synergy with each other;”
  - “consolidate the issue steering committees’ and campaign teams’ goals” to “develop long-term goals and staff allocation recommendations” and
  - be consulted on the Chapter’s priority bills before the General Assembly.
- The membership includes “a representative from each issue steering committee, campaign team, and Group, the Chapter Legislative Chair, and one or more at-large members (including the Conservation Chair) who do not represent a particular issue steering committee campaign team or Group.” It also includes a non-voting staff member, in an “advisory and coordinating role” with the ConsCom and its Team/Campaign entities.
- It does not specify the frequency of ConsCom meetings.
- It leaves the governance structure of the Issue Teams/Campaigns to those who are members, and imposes only three requirements: to develop a set of annual goals; develop a work program to achieve them; and identify a person in each Team/Campaign to “welcome new activists in a timely manner.” The expectation was that the ConsCom and each Issue/Campaign Team would play a key role in recruiting new activists and leaders.<sup>28</sup>

Thus, under the Governing Principles, the reconstituted Conservation Committee is primarily a body for coordination and information-sharing, not for decisions or vetting new policies and issues to be recommended to the ExCom. The only decision explicitly mentioned is to develop a consensus recommendation on the Chapter’s priority bills in the General Assembly.

At the December 2018 ExCom meeting, a motion was made to allow nominees for the reconstituted Conservation Committee to be considered for appointment at the January 2019 ExCom meeting. The motion passed. However, there is no record in the minutes of this ExCom meeting of a discussion or adoption of the Governing Principles document, or of the ExCom repealing the 2014 standing rule. The new ConsCom held its first meeting in March 2019.

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<sup>26</sup> “SC MD Conservation Committee Governing Principles – FINAL”, December 5, 2018.

<sup>27</sup> See Appendix B, Tables B-1 for a comparison of the 2014 and 2018 features of the Conservation Committee

<sup>28</sup> The role of Issue Advisor from the 2014 Standing Rule is not mentioned. We have not been able to determine why this role was abandoned.



## Evaluation of the Maryland Conservation Committee under the Governing Principles, 2019-2020

The Conservation Committee met quarterly under the new Governing Principles, from March 2019 through March 2020, before the Conservation Co-Chairs stepped down in May 2020.<sup>29</sup> Except for the last meeting, all were held in person.<sup>30</sup>

As of March 2020, a total of 19 ConsCom members had been appointed by the Chapter ExCom (7 Issue Team/Campaign members and alternates, 10 Group representatives, and the Co-Chairs), while the Legislative Chair and other at-large members had not yet been appointed. The number of attendees at each meeting grew over time, from 15 in March 2019 to 30 a year later.<sup>31</sup> While staff members attended a few of the meetings, it was in the context of a presentation or a specific agenda item. No staff member was ever identified as the non-voting ConsCom member. The meetings were held on weekends and lasted from 3-5 hours, sometimes including a working lunch, and in some cases a hike after the meeting. The timing and content of the meetings aligned with the Chapter's planning and budget needs.<sup>32</sup>

There were no officers of the ConsCom other than the Chair and Vice-Chair (eventually Co-Chairs), who conducted the meetings and also took minutes, sometimes helped by a volunteer. A review of the minutes for the five quarterly meetings found that the three most frequent functions of the ConsCom were: (1) sharing information and providing a forum for discussion; (2) planning and implementing the Chapter conservation program, goals, strategies, and actions; and (3) training.<sup>33</sup> There is no mention in the minutes that the ConsCom ever discussed as a body a "consensus recommendation" for the Chapter's priority bills at the 2020 General Assembly, as was intended in the Governing Principles document. There were action items in the minutes for 4 of the 5 meetings, but only one recorded vote, on approval of minutes from the previous meeting.

**The perspective of ConsCom members.** In September 2020, the Task Force distributed a survey to all ConsCom members and 17 people on the "ConsCom extended" google group list, a total of 40 people, to obtain their views on the performance of the ConsCom from March 2019 to March 2020. It included only five questions, covering: the respondent's degree of understanding of the purpose, responsibilities, and ground rules of the ConsCom; its strengths; its weaknesses; the frequency of meetings; and suggestions to improve the value and effectiveness of the ConsCom for the Chapter conservation program.

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<sup>29</sup> The Co-Chairs also spoke with the individual teams via zoom in several meetings in April 2019.

<sup>30</sup> In-person meetings were in College Park, Howard County, and Baltimore. The last meeting was virtual because of the covid epidemic.

<sup>31</sup> Source: ConsCom minutes.

<sup>32</sup> Goal setting (March), mid-year progress reports (June), mid-year goals update & how to use the Sierra Club campaign planning matrix (September); and planning and budgeting for 2020 (December). Source: 2019 Annual Report, Maryland Conservation Committee, January 24, 2020.

<sup>33</sup> Based on the independent coding of the meeting minutes by two team members and a volunteer..

Twenty-one people responded, of which ten represented Groups, seven represented issue or campaign teams; and four were at-large ConsCom members or other attendees. Nine of the 21 respondents had been to at least 3 of the 5 meetings, while 12 had been to only 1-2 meetings.<sup>34</sup> Among the main findings:

- **The overall understanding of the purpose, responsibilities, and ground rules of the Conservation Committee was lower than one would want.** Respondents rated their level of understanding on a scale of 1 (not at all) to 5 (very well). Nearly half responded with a level of 3 or higher, indicating at least a moderate level of understanding, while the rest responded with a low level or no understanding at all. The lack of understanding of the purpose of the ConsCom appeared frequently as a comment in response to the open-ended part of the survey.
- **The major achievement of the ConsCom cited by respondents was improved communication across teams, campaigns, and Groups.** Some also noted that the “reboot” of the committee was an achievement in and of itself.
- **Major weaknesses were identified:** lack of clarity on the purpose of the ConsCom, its role vis-à-vis the ExCom, and governance structure; lack of specific action, decisions, or results; low relevance or value added to Groups or Issue Teams; disappointment/ undervalue of some volunteer leaders; and financing/budgeting issues.
- **Respondents were divided on the optimal frequency of meetings.** Eight thought quarterly meetings were “just right,” while an equal number thought that they were not frequent enough. The latter group advocated for additional meetings between the quarterly meetings, either monthly, bimonthly, or in subgroups. Virtual meetings were embraced by many respondents, as the quarterly in-person meetings involve traveling long distances for those not near the center of the state.
- **Constructive suggestions were offered for improving the value and effectiveness of the ConsCom for the Chapter’s Conservation Program.** These included, among others:
  - clarifying the responsibilities and expectations of the ConsCom;
  - reducing the size, possibly creating a steering committee with functional responsibilities;
  - more engagement by the Conservation Chairs and issue campaigns and less emphasis on the ConsCom;
  - addition of subject matter experts in some role;
  - a focus on creating and strengthening issue teams and Group conservation programs;
  - providing leadership training;
  - more interaction with other organizations.

**The perspective of Group representatives.** The ten Group representatives who responded to the survey were asked, in addition to the questions on ConsCom performance already reported, about ConsCom support to their Group and the value to the Group of participation in the ConsCom.

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<sup>34</sup> For the detailed responses, see the “ConsCom Performance” background paper.

- **Very few of the Group reps made requests to the ConsCom for support.** Two requested funding for an activity, one asked for technical advice, and one requested approval or advice for a sign-on letter. None approached the ConsCom for advice on applicability of Sierra Club policy on a local issue, approval of a policy proposed by the Group for a local issue, or staff support.<sup>35</sup> It's not clear whether this was due to low need for support, lack of understanding of the type of support that could be provided by the ConsCom (vs. going directly to the ExCom or staff) , or whether the Group reps were not informed about what their Group leadership had requested.
- **None of the Group reps reported having received training from the ConsCom that would enhance their Group's effectiveness.**<sup>36</sup>
- **The main benefit of Group participation in the ConsCom was information-sharing across Groups and Issue Teams.** Group reps indicated they would like more support from the ConsCom than currently was the case.
- **The Group reps strongly endorsed more opportunities to exchange information across Groups and** suggested ways that the ConsCom could facilitate.
- **They offered suggestions for improving the relationship and coordination between Group and Chapter conservation activities.** The most prominent was that the ConsCom needs to have a more deliberate and targeted mechanism to support Groups' conservation agendas and to coordinate with the Chapter. Other suggestions included a method for regular communication (an email or newsletter) and incorporating Group representation into Issue Team structures.

**The perspective of the Conservation Co-Chairs.** In interviews, the Conservation Co-Chairs pointed to four major purposes, responsibilities, and expectations of the ConsCom, to: (1) coordinate and support each other, promote synergy; (2) support the members for goal-setting, making a work plan, and recruiting volunteers to carry out a campaign; (3) link staff and volunteer leadership; and (4) play a major role in establishing chapter conservation priorities and implementing them.

The expansion of the size of the ConsCom to include voting representatives from each Group and Issue Team/Campaign, plus at-large members was deliberate, to make it more participatory and inclusive, and to facilitate information-sharing. A major drawback was the challenge of getting all of the large membership in the same room, though the Co-Chairs were exploring ways of remote participation even before the covid epidemic. Being able to pivot quickly was another challenge of a large group. And they noted that expanded participation does not ensure cooperation, kindness, sharing, or support. While the ConsCom got help from staff members, a staff person was never appointed as a non-voting ConsCom member who would participate in the quarterly meetings.

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<sup>35</sup> They tended to go directly to staff, rather than through the Conservation Committee.

<sup>36</sup> It's difficult to interpret this result, as the minutes indicate that training was provided on goal-setting and campaign planning. Either the respondents didn't recognize this as training, weren't present for it, or thought that it did not enhance their Group's effectiveness.

The 2019 annual report from the ConsCom<sup>37</sup> included several goals going forward with respect to ConsCom governance: to provide more guidance for the issue teams and campaigns; create a steering committee to determine how ConsCom funds would be disbursed; and maintain a list of subject matter experts in the Chapter.

## The Experience of Other Chapters

The Task Force reviewed the structure and experience of the Conservation Programs of the 15 Sierra Club Chapters closest in size to the Maryland Chapter. As of the summer of 2020, two of the 15 chapters had no Conservation Committee (Massachusetts) or a dormant one (Wisconsin). Table 6 classifies the remaining 13 Chapters with respect to the Conservation Committee’s status: whether it is a standing committee of the ExCom; if a standing committee, whether it is operating under a standing rule and the extent to which the standing rule is applied; and the status of Chapters with alternative ways of organizing conservation activities.

**Table 6. Classification of Chapters with Respect to their Conservation Committee structures**

Conservation Committee that is a Formal ExCom Standing Committee		Informal Conservation Committee <sup>a</sup>	Other type of Committee that coordinates
With a Standing Rule	Without a Standing Rule		
<u>SR is applied</u> Michigan New Jersey North Carolina	<u>Informally applied</u> Ohio San Diego	Colorado Loma Prieta Mother Lode Redwood	Grand Canyon Virginia
			Oregon <sup>b</sup> North Star <sup>c</sup>

a. Not operating as a standing committee under rules in the Bylaws. b. The Oregon Conservation Committee is not operating as a standing committee and is led by staff, who also do the annual planning and budgeting. c. The North Star Chapter has a “Coordinating Committee” that coordinates four different groupings of teams: Capacity Teams; Geographical Teams; Issues Teams; and Stewardship Teams. It coordinates conservation activities, Group activities, and capacities like communications, political, and legislative.

**Nine of the 13 Chapters surveyed have Conservation Committees that are Chapter standing committees, but the degree of formality varies.** In only five is there a standing rule governing ConsCom operations; the standing rule is applied in three Chapters (Michigan, New Jersey, North Carolina)<sup>38</sup> and informally adhered to in two (Ohio, San Diego). Four other Chapters had a Conservation Committee that was a Chapter Standing Committee, but with no standing rule (Colorado, Loma Prieta, Mother Lode, Redwood). Two Chapters had an informal Conservation Committee and two had another type of committee addressing conservation – a committee led by a staff member (Oregon) and a “Coordinating Committee” with a unique organizational chart (North Star).

The characteristics of these Chapters’ Conservation Committees and the types of decisions they make are presented in Tables 6 and 7, respectively. For comparison, provisions

<sup>37</sup> “2019 Annual Report: Maryland Chapter Conservation Committee,” January 24, 2020.

<sup>38</sup> Michigan and North Carolina Chapters’ standing rules were fairly recent (2017 and 2019, respectively)

of the Maryland Chapter's 2014 standing rule and the 2018 Governing Principles are noted in the two columns on the far right side of the tables.<sup>39</sup> They focus on the overall Conservation Committee; the constituent components (issue committees and subject matter specialists) are discussed in a subsequent chapter.

**Characteristics of the Conservation Committee.** The committees vary widely in the size and composition of their voting membership (Table 6). Among the nine chapters with a standing committee, two-thirds include representatives of groups and issue entities (either committees or experts), sometimes with additional at-large members. The three outliers are North Carolina (issue representatives only); Colorado (at-large members only); and Redwood (group members only). In contrast, the two chapters with informal Conservation Committees consider whoever shows up at a meeting to be a member.

The number of ConsCom members runs from fewer than ten to nearly 40. The large size of some of these committees is mainly due to the fact that there are lots of Groups and Issue teams in the Chapter. The New Jersey Chapter, for example, has 12 groups and 25 Issue Coordinators, so total voting membership of 37. In chapters that define membership as everyone who shows up, the meeting size can also be large.

With respect to the Maryland Chapter, one can see the big increase in ConsCom size from the 2014 standing rule, with a relatively small voting membership of at-large members operating like a steering committee for other Club conservation entities (issue teams, groups), to the large voting membership in the 2018 Governing Principles that included Group representatives and issue teams, in addition to at-large members and the Legislative Chair.

Committees with large membership including Group and issue representatives are by definition more inclusive and have potential for more exchange of information, but can lead to very long meetings, logistical issues, and difficulties in achieving a quorum for decision-making. Two of the chapters (North Carolina and San Diego) have a steering committee within the Conservation Committee to address this issue. Respondents often remarked that ConsCom meetings are open to all members who wish to attend, above and beyond the voting members.

Reflecting on some of the comments received during interviews, it's important to remember that Groups and issue chairs or representatives want to be represented in certain types of decisions, but requiring their representation in a large committee also creates an obligation that may or may not be welcome. It can pull leaders who are already very busy into more meetings. It's therefore worth considering the size and composition of the membership in relation to the purpose of the Conservation Committee, the extent to which it's a decision-making body, who needs to be involved in different types of decisions, and whether for large committees, a smaller body of representatives of the larger membership might be empowered to make certain decisions.

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<sup>39</sup> The responses in Tables 6 and 7 were culled from the Chapters' written questionnaires on conservation program structure, supplemented with information gleaned from the interviews. The answers in Table 7 about decisions made by the ConsCom was in response to an open-ended question; some respondents may have been more expansive, while others may have prioritized their answers or based them on their standing rules.

Table 6. Characteristics of the Conservation Committee

Characteristic	Conservation Committee is a Formal Standing Committee									Informal Cons Com		Other Type of Committee		Maryland 2014 (Standing Com w/SR)	Maryland 2018 (Guideline)
	With a Standing Rule, applied		W/ SR, informally applied		No Standing Rule										
	Michigan	New Jersey	North Carolina	Ohio	San Diego	Colorado	Loma Prieta	Mother Lode	Redwood	Grand Canyon	Virginia	North Star	Oregon		
<b>ConsCom membership – Chair/Vice/CoChair +</b>															
Issue Sub-Committee Chair or rep	√		√	√	√		√					√			√
All members of all issue subcommittees				√											
Group representative	√	√			√		√	√	√						√
Subject matter experts		√ <sup>l</sup>		√				√				√			
At-large members	√			√	√	√ <sup>j</sup>	√	√ <sup>n</sup>					√ <sup>j</sup>	√	√
Whoever shows up					√					√	√ <sup>k</sup>				
Non-voting staff			√									√			√ <sup>n</sup>
ExCom members or representative			√									√			
Others				a					√			b			
<b>Steering Committee w/in the ConsCom</b>			√		√										
<b>Number of ConsCom members</b>	10-15	37	9	20	12	8	17	30	10	15-25	15	17	7	5	20
<b>How members are selected</b>															
Nominated by Chapter Chair & approved by ExCom			√			√	√							√	√
At-Large nominated by ConsCom Chair, approved by ExCom	√	√													
Issue Coordinators/experts nominated by Conservation chair & approved by ExCom		√													
Appointed by the ConsCom, except Group reps					√			√							
Group reps appointed by the Groups	√	√			√			√							
Sub-Committee Chairs appointed by the Excom, others are members of the Sub-Committees who show up				√											
ExCom members are also ConsCom members								√							

Characteristic	Conservation Committee is a Formal Standing Committee									Informal Cons Com		Other Type of Committee		Marvland 2014 (Standing Com w/SR)	Maryland 2018 (Guideline)
	With a Standing Rule, applied			W/ SR, informally applied		No Standing Rule									
	Michigan	New Jersey	North Carolina	Ohio	San Diego	Colorado	Loma Prieta	Mother Lode	Redwood	Grand Canyon	Virginia	North Star	Oregon		
Appointed by the Staff Conservation Director; no ExCom approval required												√			
Members not chosen or approved									√	√					
<b>Officers (beyond the Chair/V. Chair)</b>															
Secretary	√ <sup>i</sup>		√		√			√					√		
Treasurer					√										
None		√		√		√	√		√	√	√			√	√
<b>Frequency of meetings</b>															
Annually or semi-annually											√ <sup>c</sup>				
Quarterly								√		√		√			√
Every 2 months	√								√						
Monthly		√ <sup>m</sup>		√	√	√	√				√ <sup>d</sup>		√	√	
Every 2 weeks			√												
Weekly											√ <sup>e</sup>				
<b>Minutes?</b>														?	
Yes	√	√	√		√	√		√	√		√ <sup>g</sup>				√ <sup>h</sup>
Informal notes, not approved				√ <sup>h</sup>			√					√	√ <sub>f</sub>		
No										√					

a..Chair of the PAC Com. b. Member of each capacity team c. In-person meetings. d.Monthly calls between Groups & Chapter. e. Weekly phone calls f. Running notes & an action tracker. g. Staff person takes minutes on weekly calls and formal meetings. h. Notes taken by Chair/Co-chairs. i. Doesn't have to be a ConsCom member. J. Try to select from different categories, no rule. k. Conservation Committee is a kind of umbrella. Doesn't formally exist. Volunteers participate from two issue listservs (Clean energy and Beyond Coal). l. Issue Coordinators. m. The Standard Operating Procedure says at least quarterly, but they actually meet monthly. n.At-large members are people who have expressed an interest and capability to participate, and often they are subcommittee chairs. There are 19 at-large members and 11 group reps.

**Members of the standing Conservation Committees are generally approved by the Chapter ExCom.** However, in two chapters members are appointed by the Conservation Chair or Conservation Committee. Group representatives have to be appointed by their Group ExComs, but in some cases they are obligated to be approved again by the Chapter ExCom to be a voting Committee member.

The majority of Conservation Committees meet monthly or bi-monthly, but not all meetings are in person. Chapters that cover a very large area often have more infrequent face-to-face meetings (quarterly) because of the long driving distances for participants. In some chapters there are a few large meetings for the purpose of planning, with monthly calls in-between. The Virginia Chapter, for example, holds annual or semi-annual in-person meetings, monthly calls between the Chapter and the Groups, and weekly calls for those who wish to update more frequently.

**Given the large membership of many Conservation Committees, their scope of activities, and the frequency of meeting, it is surprising that so few have officers beyond the Chair or Vice-Chair.** Almost all of them took minutes or notes of the decisions made at the meetings, but fewer than half had a secretary. The rest were relying either on the chairs or volunteers to take notes. This points to opportunities to create more formal roles in some committees and to delegate responsibility accordingly, reducing the demands on the Conservation Chair.

### **Decisions made by the Conservation Committee**

The 13 chapters with Conservation Committees were asked what decisions they make. The answers are a mix of: (1) recommendations or advice to the Chapter ExCom on conservation policy for their approval; (2) decisions concerning the ongoing implementation of the conservation program; and (3) decisions having to do with entities outside the Chapter (coalitions, sign-on letters, external communications, vetting comments to government agencies). The types of decisions for these three groupings are presented in Table 7.

**All of the standing Conservation Committees deliberate on and provide recommendations to the ExCom on new conservation issues that need to be addressed by the Chapter.** There's a clear delineation in this regard between the standing committees and the informal committees; none of the Chapters with informal committees reported that the Conservation Committees engage in this type of decision. There's also clearly much more decision-making on plans, strategies, allocation of the budget or staff, and appointments among the standing Conservation Committees. With respect to the Maryland Chapter, the role has clearly evolved. Under the 2014 standing rule, the Conservation Committee was involved in recommending adoption of positions on conservation issues to the ExCom and recommending conservation priorities, but with the 2018 Governing Principles, recommendations to the ExCom center on planning and involvement in deciding the chapter's legislative priorities with the Legislative Committee.



**Table 7. What decisions are made by the Conservation Committee?**

Decisions	Conservation Committee is a Formal Standing Committee									Informal Cons Com <sup>a</sup>		Other Type of Committee		Maryland 2014 <sup>d</sup>	Maryland 2018 <sup>d</sup>
	With a Standing Rule, applied			W/ SR, informally applied		No Standing Rule									
	Michigan	New Jersey	North Carolina	Ohio	San Diego	Colorado	Loma Prieta	Mother Lode	Redwood	Grand Canyon	Virginia	North Star <sup>c</sup>	Oregon <sup>b</sup>		
<b>Recommendations to the ExCom</b>															
New cons. issues, policies, strategies, actions	√	√	√	√	√	√	√	√	√					√	
Conservation priorities			√	√							√	√	√		
Planning the conservation program, goals, strategies, actions	√			√				√						√	√
Legislation or ballot measures			√			√	√								√
Legal action						√		√						√	
Planning & recommending the conservation budget, allocating funds (or staff)								√	√		√			√	√
Appointees to the ConsCom			√												
Representatives for regional, state, national Club entities					√										
<b>Conservation program internal operations</b>															
Information sharing /forum for discussion, development, execution of conservation strategies and action plans, identifying emerging issues.	√	√	√							√	√			√	√
Support and input to Groups' conservation work	√	√													
Provide conservation news to the Chapter newsletter, action alerts			√		√										
Coordination between teams			√								√			√	√
Identify issue chairs/leaders who can recommend, develop, implement, support action strategies			√											√	
Delegate issues to subcommittees, as appropriate					√										
Fundraising for the conservation program					√										
Create task forces on issues with a limited lifetime					√										

Decisions	Conservation Committee is a Formal Standing Committee									Informal Cons Com <sup>a</sup>		Other Type of Committee		Maryland 2014 <sup>d</sup>	Maryland 2018 <sup>d</sup>
	With a Standing Rule, applied			W/ SR, informally applied		No Standing Rule									
	Michigan	New Jersey	North Carolina	Ohio	San Diego	Colorado	Loma Prieta	Mother Lode	Redwood	Grand Canyon	Virginia	North Star <sup>c</sup>	Oregon <sup>b</sup>		
that need more attention than from an issue team															
Recruit new members														√	√
Promote best practices, provide training		√										√			
Monitor implementation												√			
<b>Decisions on external relations</b>															
Coalitions/collaboration with other organizations			√			√									√
Recommend/make decisions on sign-on letters			√			√									√
Assist chapter leaders w/external communications															√
Vet Chapter comments for external agencies															√

a. Not operating as a Standing Committee under rules in the bylaws. (b) The Oregon Conservation Committee is not a Chapter Standing Committee. It is led by staff, who also do the annual planning and budgeting. (c) The North Star Chapter has a different model – a “Coordinating Committee” that coordinates four groupings of teams: Capacity; Geographical; Issues; and Stewardship. It coordinates conservation activities, Group activities, and capacities like communications, political, legislative, etc. d. The responses for Maryland reflect what is in the 2014 standing rule and the 2018 Governing Principles documents, while for the other chapters they reflect the answers to an open-ended question.

**Decisions about the coordination and implementation of the conservation program are concentrated entirely in the Conservation Committees with standing rules.** Information sharing is part of that package, but is spread over more of the chapters, including those with informal Conservation Committees. In the Maryland Chapter, a review of the minutes from the five quarterly meetings in 2019-20 found that by and far, information sharing was the major activity, and no decisions or formal votes were recorded. Information sharing, coordination between teams and groups, and recruitment of new leadership and activists are identified as decisions within the purview of the Conservation Committee in both the 2014 and 2018 documents

**Surprisingly few of the Conservation Committees indicated involvement in decisions involving entities outside the Club.** Only the North Carolina and Colorado Chapters indicated they had a role in decisions on coalitions and sign-on letters. In Maryland, decisions on external relations were a major concern in the 2014 standing rule, including coalitions, sign-on letters, external communications, and vetting of Club comments to government agencies. None of these responsibilities are included in the 2018 Governing Principles.

## Issue Entities

*“Really, the core of the work is done by these teams”<sup>40</sup>*

Sierra Club’s Chapter bylaws require the elected Executive Committee to adopt a Conservation Program to “further the conservation objectives and priorities of the Club within the Chapter boundaries... and provide for the development and execution of specific conservation strategies and action programs...”, and to do so in a way that provides opportunities for its membership to get involved and trained to be effective advocates (Box 5).

### Box 5. Required elements of Sierra Club’s Conservation Program

- “...provide an opportunity for groups, sections, other chapter entities, and individual members to become involved in conservation activities”
- “...provide recruiting and training of activists to develop the necessary skills and judgment for publication and discussion of conservation issues, and for networking and alert systems...”

Source: Sierra Club Chapter bylaw 5.3

The bylaws do not give any guidance for how these elements can be incorporated into a conservation program, but the Executive Committee alone or through the Conservation Chair has the latitude to adopt whatever configuration works. The formation of Issue Teams or engagement of subject-matter experts provides the structure for development and execution of conservation strategies and action plans while engaging the grassroots volunteer membership. Even in a chapter with staff assigned to specific conservation issues, there’s an explicit mandate in the bylaws to engage, recruit, and train volunteer members to participate in the Conservation Program and improve its chance of success.

**Types of Issue Entities.** Sierra Club resources in *Campfire* describe three different types of issue-oriented entities -- an Issue Chair, Issue Committee, and Campaign Team (Box 6). They encompass individual experts or point persons as well as formal or informal teams of a few or many people. The responsibilities articulated in Box 6 are a suggestion -- there are many variants of issue entities across Sierra Club Chapters. Based on our interviews with other Chapters, these volunteer entities, with or without staff support, are largely the campaigns and programs on the ground. They do more than coordinate; they are implementers. They set objectives and get them done by many different strategies and means. In Chapters with both Conservation Committees and issue entities, the Conservation Committee often plays a coordinating or supporting role, but the work on the ground is via these issue and campaign teams and individual issue experts.

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<sup>40</sup> Conservation Chair, Colorado Chapter.

## **Box 6. Issue Chairs, Committees, and Campaigns**

### **Issue Chairs**

An Issue Chair is a member with specific issue knowledge who is willing to be the Chapter's "go to" person for a particular issue area. Issue Chairs act as Sierra Club "watchdogs," either keeping abreast of actions that could potentially harm the local environment and taking steps to prevent them, or identifying emerging opportunities to protect or restore the environment and acting on those.

The primary work of an Issue Chair is to:

- Develop public comments on decisions that public decision makers are about to make or have already made
- Testify at public hearings on behalf of the Club
- Share information that might be helpful to other Club leaders and members

In addition to being well-versed on their topic, Issue Chairs need to be adept at researching, writing, and developing relationships with a variety of key stakeholders. Despite the use of the word "Chair," in most instances they are lone actors

### **Issue Committees**

On an issue committee, each member is working on something related to a broad environmental topic that they are passionate about and is focused on environmental decisions that they are most knowledgeable about, either because the decisions are local to their area or it is their area of expertise or personal interest.

The primary work of the committee is to:

- Coordinate the Club's comments on decisions that public decision-makers are about to make or have already made
- Share information that might be helpful to other committee members
- Identify common information needs and commit to research and preparation of materials

### **Campaign Teams**

Campaign teams focus on expanding grassroots leadership and developing effective campaigns at the scale needed to win significant climate recovery and other victories. They need to keep in communication with relevant issue chairs, committee chairs, and the Conservation Chair. Campaigns are often organized by chapter or national staff. Organizers, both staff and volunteer, provide key leadership, including recruiting and developing new team leaders. They work toward a common goal, such as achieving a specific measurable milestone or influencing a targeted public decision.

The work of team members includes:

- Making plans and engaging in tactics to influence targeted decision makers via public mobilizing, engaging other community leaders, media, political relationships, etc.
- Identifying other volunteers – help them get going on working together, building grassroots leadership skills, and gaining confidence and commitment
- Developing common campaign materials and narrative that motivates others
- Meeting regularly to evaluate actions taken, plan next steps, support fellow team members, and identify possible new resources.

**Source:** Sierra Club, "Engaging multiple types of leadership in Local Conservation Work." (See resources listed at:

<https://community.sierraclub.org/section/chapters/office-chapter-support/chapter-leader-resources/conservation-chair-resources>)

## Issue Entities in the Maryland Chapter over the past six years

In the year running up to 2015, volunteer issue teams were informal, while national campaigns were led by staff with participation by volunteer members. The issue teams and campaigns were not Chapter standing committees. A side-by-side comparison of key features of the 2014 standing rule and the 2018 Governing Principles with respect to issue entities is presented in Appendix Table B-2 and summarized below.

**2014 Conservation Committee Standing Rule.** The standing rule adopted in December 2014 not only clarified the governance of the Conservation Committee, but also the structure and governance of three issue entities – Issue Committees,<sup>41</sup> Campaigns, and Issue Contacts. In this model, the Executive Committee appoints the Conservation Chair and 3-7 Conservation Committee members, and delegates to the Conservation Chair and ConsCom decisions concerning the creation of Issue Committees and Campaigns and appointment of Committee Chairs and Issue Contacts. The ExCom retains the right to override or modify Campaign decisions, Issue committee decisions, and ConsCom decisions.

Issue Committees have two main responsibilities under the 2014 standing rule:

- To “make recommendations about priorities and positions on their issue and help develop and review campaign plans;” and
- To “review positions taken by other Club entities to assure compliance and consistency with Sierra Club conservation policies”

Issue Committees may also make recommendations to the ConsCom with regards to participation in coalitions that might strengthen their campaigns.

Issue Committees are formed by the Conservation Committee when one or more related campaigns are established and approved, or when there are one or more Issue Contacts active in a given issue area. They must have multiple members who have interest in the related issue campaign and ideally have issue matter expertise. The Issue Committee provides a coordinating function when there is more than one related Campaign.

An Issue Committee must have at least three members designated by the Conservation Chair to “make recommendations about priorities and positions on their issue and help develop and review campaign plans.”

- At least one member “should be independent of the active campaign committee to allow for broader perspective on the issue beyond that of any single campaign.”
- At least one person on the Committee should be designated as a liaison between work in Maryland and at the national level, and be familiar with relevant national policies.

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<sup>41</sup> The standing rule uses the terms “Issue Committee” and “Issue Team” interchangeably.

Issue Committees are led by a volunteer Issue Committee Chair, appointed by the Conservation Committee Chair to “facilitate and coordinate work between the campaigns and issue contacts” and “facilitate the participation and leadership of Chapter and local Group members.”<sup>42</sup> The standing rule also notes that “while subject matter expertise is valuable, the people serving in these roles [Issue Committee Chair or Campaign Chair] should primarily focus on organizational coordination and development.” Other than by setting a minimum size, the standing rule makes no mention of a minimum standard for the Issue Committee, the length of tenure of the Chair or members, or how it can be dissolved.

Issue Contact. This is a role taken up by individual volunteers as issue experts for conservation issues for which the Chapter doesn’t have an active campaign. They serve as an information resource for the Chapter on their issue and, when approved, may serve as a Chapter spokesperson for that issue. The Issue Contact is required to maintain familiarity with Sierra Club policies related to their issue. If a campaign is approved in the issue area of the Issue Contact, they can serve as the Issue Chair or Campaign Chair, or a new person can be recruited to focus on the organizational functions while the Issue Contact transitions into a role as a member of the issue or campaign committee.<sup>43</sup>

**The 2018 Governing Principles.** This document steps away from or is silent on most of the structure imposed by the 2014 standing rule on issue entities and drops their role in making recommendations on conservation policy and ensuring compliance with Sierra Club policy. Issue Contacts are not mentioned.

In the 2018 Governing Principles, Issue Steering Committees are primarily responsible for developing annual goals and a work plan to achieve them. Along with Campaign Teams, they are required to:

- “assign a person to be responsible for welcoming new activists in a timely manner”
- “participate in Chapter legislative activities” and
- “be consulted in development of a consensus recommendation on...the chapter’s priority bills in the ...Maryland General Assembly.”

The Issue Steering Committee Chair or Co-Chairs and other officers are selected by the Issue Steering Committee’s members and each Issue Steering Committee and Campaign Team is responsible for determining its own governance structure, while “ensuring full transparency and participation by chapter members who engage on its issues.” Thus, while the title “Issue *Steering Committee*” would seem to imply some sort of governance structure, the members, roles, and responsibilities of members of a steering committee and who would appoint them are not explained in the Governing Principles document.

The document is equally silent on the Issue Committee Chair’s responsibilities, the criteria for formation or dissolution of an Issue Steering Committee, and the entities responsible for these decisions. In the 2018 Governing Principles, the Conservation Chair,

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<sup>42</sup> The standing rule says that Issue Committee Chairs are appointed by the Conservation Chair, but doesn’t mention whether the appointment must be confirmed by the ConsCom.

<sup>43</sup> The standing rule doesn’t mention who appoints the Issue Contact, but it is presumably the Conservation Chair.

ConsCom, Committee and Executive Committee have no role in establishing an Issue Steering Committee or appointing its leadership. However, because representatives of the Issue Steering Committee are designated as voting members of the Conservation Committee (a Chapter Standing Committee), they must be appointed to serve on the ConsCom annually by the ExCom.<sup>44</sup>

## Health of the Maryland Chapter's Issue Teams, 2018-2020

Following the departure of the Conservation Chair in April 2017 and attrition of the remaining 4-5 members of the Conservation Committee in the months that followed, the Maryland Chapter functioned without the benefit of a Conservation Chair or Conservation Committee. However, the Conservation Committee had succeeded in creating and nurturing a number of Issue Committees in the preceding two years based on the December 2014 Conservation Committee standing rule and under the leadership of two Conservation Chairs.<sup>45</sup>

**2018 Issue Committee Survey.** As of the fall of 2018, there was still no Conservation Chair or Conservation Committee, but seven Issue Committees continued to function: Beyond Gas; Energy; Natural Places; Public Health; Transportation; Water; and Zero Waste.<sup>46</sup> In preparation for a leadership retreat, a review of the “health” of the seven functioning committees was prepared, covering: governance (committee structure and reporting); the mission and scope of the Committee’s activities; Committee membership and communications; meetings and events; and financial and staff resources.<sup>47</sup> The respondents to this survey were the Committee Chairs, who were also asked open-ended questions about (1) the main problems or constraints they face in running an effective Issue Committee; (2) the kinds of support that could help improve the Committee’s effectiveness; and (3) the major lessons learned about running an effective committee.

- All but one of the seven Issue Committees (Natural Places) reported having a Steering Committee, with 4-10 members. Three had subcommittees. The Energy Committee leadership was in transition.
- It wasn’t clear what was expected of the Steering Committee; note-taking and minutes were usually taken by volunteers at the meeting, the Committee Chair, or a staff

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<sup>44</sup> The requirement that voting Conservation Committee members (including representatives of Issue Committees and of Groups) be approved by the ExCom has led to confusion about the role of the ExCom in approving formation of an Issue Committee and confirming its leadership. Neither the 2014 standing rule nor the 2018 Governing Principles require action by the ExCom in creating Issue Teams or Campaigns, or appointing their leadership. It’s only by virtue of the fact that the Governing Principles require every Issue Steering Committee and Group to have a representative as a voting member of the Conservation Committee that the ExCom had any approving role.

<sup>45</sup> Dave O’Leary until March 2016, followed by Doreen Paster until April 2017.

<sup>46</sup> The national Beyond Coal campaign was also operating, but mainly run by staff and wasn’t considered an Issue Committee at the time, so wasn’t surveyed.

<sup>47</sup> M. Ainsworth, “Survey of Maryland Sierra Club Issue Committee Chairs: Results,” November 2018.

member for those that had staff. The Committees didn't have officers other than the Chair.

- They reported a total membership (including steering committee and any people on a listserv) of as few as 7 people and as many as about 250.
- Five had regular Committee meetings or phone calls, from weekly (Beyond Gas) to every six weeks (Zero Waste). However, this does not include technical briefings and educational events (5 Committees), lobbying for county legislation (4), or field trips and stewardship activities (3) organized by the Committees.
- Communications were a weak point. Only one (Transportation) had regular communication with its members; others communicated "as needed" (Water, Zero Waste) or for meeting reminders (Public Health). They all had a chapter webpage or website. Five of the seven had members trained in Campfire.
- Staff resources and financial resources were unevenly distributed. The Transportation and Water Committees benefitted from large foundation grants and some staff time. The others received little if any financial support, but some staff time (except for Zero Waste<sup>48</sup>). The Chairs were uncertain how much staff time they could tap.

The Committee Chairs provided detailed information about their conservation and organizational goals for the year and their specific achievements. All seven reported some degree of collaboration with local Sierra Club Groups. For the open ended questions,

- The major problems in running the Committee were volunteer recruitment, keeping activists engaged, and overload of the Chair.
- In terms of additional support from the Chapter, they requested guidance on: Committee structure and process; defining a mission statement; clarifying the lines of authority; training on organizational skills; support from Chapter staff; and addressing overlaps in issues across teams.
- The lessons learned involved the need for staff support, organizational (as opposed to issue content) support, the need to recruit steering committee members who can lighten the load of the Chair; and the importance of communication and organizing more specific speakers and events for Committee members.

In March 2019, four months after the 2018 survey and leadership retreat, the Executive Committee voted to confirm a new Conservation Chair and Vice Chair and a large Conservation Committee comprised of representatives of all Issue Teams, Campaigns, and Groups, plus the Legislative Chair and other at-Large members.

**2020 Issue Committee and Campaign Survey.** To update the health of the Issue Teams following the nearly year and a half (5 quarterly meetings) of operation under the revived ConsCom, the Task Force conducted a repeat survey of the health of Issue Teams or Campaigns that were active as of May 2020, according to the Conservation Co-Chairs' handover notes, on a subset of the issues examined in 2018, focusing on governance, membership and communication, resources, collaboration, and the open-ended questions about problems,

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<sup>48</sup> The person providing some staff support to the Zero Waste team left and no replacement was assigned.



needs, and lessons.<sup>49</sup> The survey was conducted from August 28-September 3, 2020. Seven of the nine Issue Teams or Campaigns responded: Beyond Coal Campaign; Beyond Gas Campaign; Natural Places Team; Synthetic Turf Campaign; Transportation Team; Water Campaign; and Zero Waste Team.<sup>50</sup>

**Over the two years, there was a marked reduction in the number of Issue Teams, and an increase in campaigns led by a few who had been part of a larger team** (see Table 8). Of six Committees surveyed in 2018, only three remained intact as an Issue Team in 2020 – Natural Places, Transportation (with a large staff input), and Zero Waste. The volunteer-led Energy, Public Health, and Water Committees were no longer active, but volunteers leading Public Health subcommittees on pesticides and synthetic turf were re-classified as Campaigns, as was the lead volunteer on Water. Beyond Gas was reclassified as a campaign, which was probably what it should have been in 2018.

**Table 8: Changes in Chapter Issue Entities, 2018-2020<sup>a</sup>**

Issue	2018 Survey (October)		2020 Survey (September)	
	Surveyed?	Status	Surveyed?	Status <sup>c</sup>
<b>Committee or Team</b>				
<b>Beyond Gas</b>	√	Committee		Relabeled a campaign
<b>Energy</b>	√	Committee		No longer active <sup>e</sup>
<b>Natural Places</b>	√	Committee	√	Team
<b>Public Health</b>	√	Committee		No longer active
Pesticides		PH Subcommittee		Became a campaign
Synthetic Turf		PH Subcommittee		Became a campaign
<b>Transportation</b>	√	Committee	√	Team
<b>Water</b>	√	Committee		No longer active
<b>Zero Waste</b>	√	Committee	√	Team
<b>Campaign</b>				
<b>Beyond Coal</b>	<sup>b</sup>	Campaign	√	Campaign
<b>Beyond Gas</b>			√	Campaign
<b>100% Clean Energy</b>	<sup>b</sup>	Campaign		No longer active <sup>d,e</sup>
<b>Pesticides</b>				Campaign
<b>Synthetic Turf</b>			√	Campaign
<b>Water</b>			√	Campaign

a. In 2018, most committees were referred to as “Issue Steering Committees,” while in 2020 some had been re-named “Teams” and others “campaigns.” The criteria for these classifications remain unclear.

b. Beyond Coal (a staff-led National campaign) and the 100% Clean Energy campaign were in existence in 2018, but were not labeled as Committees at the time so were not surveyed.

c. Status/classification as noted in the Conservation Co-Chair handover notes. The handover notes also listed an “Agriculture and Forest” team, but evidently no one had been recruited to lead it, and as of the time of the survey no active team had been recruited.

d. Handover notes said it was a campaign, but the former leader said it had been dissolved.

e. Since the September 2020 survey took place, the Energy Committee and “Ready for 100” campaign have been reinvigorated.

<sup>49</sup> Conservation Governance Task Force. “Survey of Maryland Sierra Club Issue Team and Campaign Chairs,” October 2020.

<sup>50</sup> The Pesticides Campaign did not respond and the 100% Clean Energy Campaign declined to participate because the Campaign had been dissolved as of the date of the survey.

**During this two-year period, the Transportation Team, and Beyond Coal and Beyond Gas Campaigns benefitted from full-time or nearly full-time staff support,** so it is perhaps not surprising that those issue entities survived. Other teams received support from staff member Zack Gerdes, who lent a hand on multiple issues over the period and helped with technical matters (emails, social media, action alerts) for volunteer leaders, before he left in December 2019. However, teams enjoyed more logistical support from Gary Young, who joined the staff in February 2018.

**The three Issue Teams that survived until 2020 were performing relatively well, and despite the Covid-19 epidemic that disrupted many plans.** The Transportation team, with strong staff support, embraced four campaigns – Stop I-495 and I-270 expansion, Regional Clean Transportation Policy (TCI), Strong Transit in Greater Baltimore, and Electric Cars and Buses. The Natural Places Team, under new leadership, was forming a steering committee, sponsored four subcommittees (Water Issues, Native & Invasive Plants, Wildlife & Endangered Species, Lands & Parks), and distributing a monthly newsletter. The Zero Waste Team had a strong Steering Committee (“leadership team”) of Zero Waste Lead volunteers for eight local Groups, working on state-level issues while organizing zero waste activities in their respective Groups. Overall, the membership of these teams was stable or increasing and communication improved.

One wonders, however, whether more pro-active, targeted support in terms of recruitment, logistics, training, or communications to teams that became inactive since 2018 might have helped sustain them. Sometimes high-performing volunteers on a Team or Campaign find themselves, through no fault of their own, a one-person operation when other team members move out of the area or have to step back for other reasons. It’s a recurring theme in the Maryland Chapter and nationwide that many volunteers working on an issue that inspires them either lack the skills, the bandwidth, or the interest in organizing or recruiting.

**The ConsCom survey results suggest that the ConsCom (consisting of representatives of Teams and Groups) and the Co-Chairs were not a major source of support to Issue Teams and that members may not have had a clear picture of what kind of support the ConsCom or co-Chairs could provide.** Only two of the seven Teams or Campaigns felt that they had at least a moderate understanding of the purpose and responsibilities of the ConsCom.<sup>51</sup> In comments, the respondents advocated for more of a focus on support for Issue Teams, including a “go to” person on the ConsCom to help the Teams. They reported a lack of clarity on how the ConsCom and the Co-Chairs are expected to support the Issue Teams, Campaigns, and Groups. Several respondents also advocated for a formal role for individual issue experts, to complement the Issue Teams and expand opportunities for participation in the Conservation Program.

**The responses to the 2020 Survey underscore many of the continuing problems faced by Issue Teams and Campaigns – inadequate volunteer recruitment, keeping activists engaged**

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<sup>51</sup> Conservation Governance Task Force, “ConsCom Performance,” November 15, 2020.

after they're recruited, and an overload of work for the Chair, leading to burnout.<sup>52</sup> Team leadership needs to be fully briefed on Sierra Club policies and processes. They want greater clarity on expectations for an Issue Team and where they can get support, more training on organizational skills, help from the chapter in recruitment, and a Team structure of shared responsibility to prevent burnout.

## The experience of other Chapters

The quote from Colorado's Conservation Chair at the beginning of this chapter is upheld by the experience of other chapters. Of the 15 Chapters studied, all but one had Issue Teams of some sort, subject matter experts, or both. This held true for Chapters with a formal Conservation Committee (10), an informal one (2), or no Conservation Committee (2). The sole exception was the Oregon Chapter, which has a Conservation Committee of seven people headed by a staff Conservation Director, who appoints them. It has no Issue Teams, but does have several standing committees led by national program staff (Beyond Coal, Clean Energy for All) that operate in parallel to the ConsCom.

Seven of the Chapters had Issue Teams only<sup>53</sup> three had only Subject Matter Experts, and four had both (Table 9).

**Table 9. Distribution of Chapters with Issue Entities**

Issue Teams only	Both Issue Teams & Experts	Subject Matter Experts only
Colorado	Mother Lode	Michigan
North Carolina	North Star	New Jersey
Loma Prieta	Grand Canyon	Virginia
Ohio	Massachusetts	
Redwood		
San Diego		
Wisconsin		

Source: Appendix Tables C-2 and C-5.

## Issue Teams

Eleven Chapters had an issue entity variously referred to as an Issue Team, a Team, an Issue Committee or Subcommittee, or a Campaign Team.<sup>54</sup> They had as few as four and as many as 14 Issue Teams, with a mean of seven.

<sup>52</sup> Chairs face organizational and recruitment challenges in forming a team, as well as issues of expertise, including managing interpersonal relationships among team members, sometimes dealing with volunteers' disruptive behavior. These are issues that many are not trained to deal with.

<sup>53</sup> The Ohio and Redwood Chapters consult members who are experts on specific issues informally.

<sup>54</sup> None of these chapters mentioned a campaign as something intrinsically different from a team. The teams, subcommittees, etc., are presumed to launch campaigns.

**The charge of an Issue Team** (Appendix Table C-2). Only four Chapters had formal descriptions of the charge of these entities based on a standing rule, bylaw, or handbook, while respondents from four other Chapters merely described the responsibilities. The key expectations for an Issue Team among the Chapters who articulated a charge were that the team would:

- Define a problem, goals and objectives
- Identify solutions and a strategy to achieve them
- Develop an action plan and launch a campaign

In two Chapters there was also the expectation that the team would review projects or policies in their area and provide feedback to the ConsCom on the position the Chapter should take. The Massachusetts Chapter was an outlier, with a description of a Team that is much more informal -- “a group of people who want to work informally on an issue together” – and there is no Team Chair.

**Selection of the Issue Team Chair and Team members** (Appendix Table C-3). The Chapters are evenly split in terms of which entity appoints Issue Team Chairs – the Conservation Committee or the Executive Committee (Table 10). In three of the Chapters, the nomination of the Chair comes from the Team itself, and in a fourth (Ohio), the Sub-Committee makes a recommendation to the ConsCom, which passes the recommendation to the ExCom.

**Table 10: Selection of Issue Team Chairs**

Conservation Committee	Executive Committee	Both
Colorado <sup>a</sup>	Grand Canyon	Mother Lode
Loma Prieta	North Star <sup>a</sup>	
North Carolina	Ohio	
San Diego <sup>a</sup>	Redwood	

*Source:* Appendix Table C-3.

*Note:* Teams in the Massachusetts Chapter have no chair and in Wisconsin 5 of the 6 teams are led by staff.

- a. The team members nominate their chair, who is then approved by the appropriate body.

In contrast, in all but two of the Chapters the Team members are volunteers who self-select or are recruited by the Team Chair.<sup>55</sup> In the North Star and Ohio Chapters, to be eligible to vote the team member must have attended at least one team meeting (North Star) or have participated “meaningfully” in the Subcommittee activity (Ohio) in the past 12 months and be a member in good standing.

**Responsibilities of the Team Chair.** Only about half of the Chapters provided a description of the responsibilities of the Issue Team Chair (Appendix Table C-3). Among the most common responsibilities: organize Team meetings; attend ConsCom meetings and communicate with Chapter leaders; recruit and mentor new volunteers; provide direction on the issues and communications on that issue; bring new issues to the ConsCom; coordinate

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<sup>55</sup> In the Mother Lode Chapter, Team members are nominated by the ConsCom and approved by the ExCom, with no specified term. In the Ohio Chapter, the Subcommittee members must be approved by other members of the Subcommittee.

with other organizations working on the issue; and identify resources, actions, and strategies to address the issue.

**Minimum standards for Teams.** Only four Chapters pointed to any type of minimum standard for Teams (Appendix Table C-4). These criteria included:

- Identification of goals and objectives (North Carolina)
- Develop and maintain campaign or work plans (North Star, Ohio)
- Communication, progress reports to the ConsCom (North Star, Ohio)
- Record-keeping and minutes for all Team meetings (North Star, Ohio, San Diego)
- In-person meetings at least twice/year, notification of meetings, end-of-year report (Ohio)

**Criteria for new Teams.** Most Chapters have informal criteria for creating a new team (Appendix Table C-4) For example:

- “If there’s sufficient interest and a leader steps forward, new Subcommittees may be formed.” (Grand Canyon)
- “Nothing formal, just need and willingness to serve.” (Redwood)
- “Anyone who raises their hand and has a good idea. Ask the ConsCom to approve and take it to the ExCom.” (Ohio)
- “The leaders working on an issue contact the ConsCom Chair, begin to hold meetings, and attend ConsCom meetings. They present what they want to work on to the ConsCom and select a chair to represent themselves.” (Loma Prieta)
- “If someone steps forward, is willing to accept Sierra Club policies and constraints and they are capable, the Chapter Chair will support them and with staff will provide guidance and direction.” “There are a lot of informal groups of volunteers working on issues that crop up, that aren’t exactly ‘teams’.” (Wisconsin)

However, even if the criteria are informal, new teams may require approval of the ConsCom (Loma Prieta, San Diego), the ExCom (North Star, Ohio), or support from the Chapter Chair (North Carolina, Wisconsin). The Massachusetts Chapter requires a purpose and roles on the team, and a staff liaison who will support them, plus at least one other person or a staff member to share the work. The criteria for the North Star Chapter is even more elaborate.

**Formation and departure of Teams in the past 2 years.** The respondents held a great deal of tolerance for temporarily inactive issue teams or those that are left with only one or two members (Appendix Table C-4). They generally recognized that Issue Teams go through periods of greater activity and periods of dormancy, depending on the continued relevance of the issue and events in volunteers’ lives.

For example, four of the ten Chapters reported that a new team had been formed in the past two years, while six reported no new team. Among those reporting no new team, the Redwood Chapter added, “no, except that the Forest Committee was recently reformed after a period of inactivity.” Similarly, five chapters responded that no Issue Teams had been dissolved, but one of them noted that the Water Committee doesn’t have a Chair and is

inactive. It isn't dissolved, it's inactive and awaiting an infusion of new volunteers or a new chair.

Five Chapters did report that an Issue Team had dissolved in the past two years. This generally happens when there's no volunteer to lead or the issue is no longer relevant. In the Loma Prieta Chapter, for example, the Soils Committee Chair moved away and no one stepped up, while the Fracking Committee is dormant because the prospects of drilling in the Chapter's territory have waned. The Grand Canyon, Mother Lode, North Star, and San Diego Chapters provided similar examples of Teams that had dissolved in the past 2 years.

The Grand Canyon Chapter advocates flexibility during periods of low activity. To quote the Director, "...there usually is some activity going on. I can think of very few cases where there's none." "Things happen in people's lives... Flexibility helps to acknowledge that these are volunteers, they're giving up big parts of their life to support the work that we're doing. I think we can be a little bit flexible about downtime. So, for example, if they didn't submit a budget or a plan for that year, it doesn't mean that they have to stop having a Committee. It just means that if they want money, they're going to have to submit something sometime."

**Committees of one.** One of the controversial issues in the Maryland Chapter has been whether a hardworking and effective volunteer can be a committee of one – temporarily or over a longer term. Six of the eleven Chapters admitted that several of the Issue Teams currently or in the past had only one member (Grand Canyon, Redwood, Loma Prieta, Colorado, North Carolina).

- The Redwood Chapter noted that there had been single-person committees who worked across the chapter.
- In the Loma Prieta Chapter, "some Issue Committees are basically one person taking the load, but they collaborate with other environmental NGOS, so collaborative teams are wide, even if they don't have a fully functioning Issue Committee."
- The Colorado Conservation Chair estimated that of the 11 Issue Teams, probably 2-3 have just one person. This can be because members are interested in a very narrow, specialized issue. For example, one volunteer was working on NAFTA as an issue,<sup>56</sup> while another was a specialist in underground mining and its impact.

The San Diego Chapter has an unwritten rule that a Subcommittee should have no fewer than three members and that single-person Subcommittees are not allowed. The Ohio Chapter also officially has a minimum membership of three for a Subcommittee, but it is not always upheld. To quote the North Carolina Conservation Chair: "*A committee of one that's effective shouldn't be turned away.*"

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<sup>56</sup> This is an interesting example of when a volunteer was interested in following an issue for which Sierra Club had a national policy, but not necessarily an issue that the Chapter was prioritizing.

## Subject-Matter Experts

One option for engaging more volunteers in the Conservation Program when a team cannot be recruited or for a specialized topic, is to enlist subject matter experts. This is a role equivalent to the Issue Chair in *Campfire*, described earlier in Box 6. Maryland’s 2014 Conservation Committee standing rule previewed “Issue Contacts” in this role; the Maryland Conservation Co-Chairs were contemplating such a role in their 2019 Annual Report; and several respondents to the ConsCom survey suggested that the Chapter consider adding subject matter experts to the Conservation Program.

Seven Chapters had subject-matter experts, either alone, or in parallel to Issue Teams (Appendix Table C-5). They go by different titles – “Issue Chair” in Massachusetts and Virginia, “Issue Coordinator” in New Jersey, “Activist Field Expert” in Michigan”, and “Steward Teams” in North Star. Most respondents did not mention the number of Subject-Matter Experts, but there can be many: the New Jersey Chapter has 24 Issue Coordinators and Virginia more than 20 Issue Chairs. In contrast, the Massachusetts Chapter (which doesn’t have a Conservation Committee or a Conservation Chair) has seven Issue Chairs. This role was only recently initiated in Michigan.

**Appointment of Subject Matter Experts.** The Chapters are evenly split on whether the Subject Matter Experts are appointed by the Conservation Chair/Committee or the Executive Committee (Table 11). They report to the Chapter ExCom in Grand Canyon Chapter, to the Chapter Director in Massachusetts, and the Conservation Chair or Committee in the five others.<sup>57</sup>

**Table 11: Appointment of Subject Matter Experts**

Conservation Chair/ ConsCom Chair	Executive Committee
Michigan Mother Lode <sup>a</sup> Virginia	Grand Canyon <sup>a</sup> Massachusetts New Jersey <sup>a</sup>

Source: Appendix Table C-5.

a. Appointed annually.

**Role of the Subject Matter Expert.** Only four of the Chapters provided a description of this role, and it varies considerably across Chapters (Appendix Table C-5). A generic job description of an “Issue Chair” from *Campfire* was presented earlier, in Box 6, but the role can be less or more ambitious than what is described there.

On the one hand...

- In the Grand Canyon Chapter, the Subject Matter Expert responds to member and non-member requests for information and direction.

<sup>57</sup> The North Star Chapter has a unique organizational chart that has an ExCom but no ConsCom... The Steward Teams report to the Coordinating Committee Chair

- In Michigan, the Activist Field Expert “follows the issue” and updates the ConsCom. Some are former members of a committee that dissipated.
- In Virginia, they work on specific campaigns or “self-organize a team when issues come up.”

On the other hand...

- In the North Star Chapter, “Steward Teams coordinate with campaign teams and the legislative team to inform advocacy work by conducting research on environmental issues and potential policies, initial review of ad hoc proposals, and they interact with other environmental groups.”
- In the Massachusetts Chapter, Issue Chairs are described as “technical and strategic consultants,” on issues for which there is no Issue Committee. They are responsible for identifying and championing priorities related to their issue area and ensuring that all Chapter work related to their issue area is in compliance with Club policy. They draft testimony and review legislation.

## V. Conclusions and Recommendations

This review has aimed to identify areas in which the governance of the Maryland Chapter Conservation Program can be strengthened to better address its objectives, and to learn from the experience of other Sierra Club Chapters of about the same size. It has brought to light new evidence on the governance of the Maryland Chapter’s program :

- The information and lessons of other Chapters have helped to put the Maryland Chapter’s experience in perspective
- The review has underscored the central objective of the Conservation Program-- *to get members more involved in issues and to support them to be effective leaders.*
- It also revealed that there is substantial flexibility in Chapter bylaws to adopt a structure and assign responsibilities for the Conservation Program in a way that takes into account the capacity of Chapter staff and availability of volunteer leaders.
- The Zoom revolution due to the Covid epidemic has increased greatly the ability of far-flung Sierrans to participate in more frequent information sharing. In Chapters covering large geography, meetings have been infrequent because of the long distances that volunteer leaders have to drive for face-to-face meetings.

The respondents from other Chapters offered important advice concerning the risks of imposing too much structure on the Conservation Program:



- **Chapters need to be welcoming to members who want to get involved in working on an issue, whether a Chapter priority or not.** The Sierra Club has a lot of rules, policies, and red tape that are difficult for new volunteers to navigate. Accountability and transparency are important, but if participation becomes too burdensome, volunteers and potential leaders will look elsewhere.
- **The Issue Teams don't work for the Conservation Chair or the ExCom.** The main responsibility of the Conservation Committee and Chair with respect to the Issue Teams is to coordinate, facilitate, and support them to increase their impact and help develop new leadership.

In this section we make recommendations about the structure and responsibilities of different components of the Maryland Chapter's Conservation Structure, to address shortcomings discovered in the Program. **If and when agreement is reached on these recommendations (including the distribution of tasks across the different actors), they should be incorporated into a Chapter standing rule for the Chapter Conservation Program.**

**Finally, we recommend that any new standing rule be revisited periodically to take into account the lessons learned in its implementation and so that it remains relevant to the needs of the Chapter.** To quote the North Carolina Chapter team, there's no such thing as a "final" standing rule. Their standing rule, approved in 2019, continues to be termed "a work in progress," and so should any new standing rule for the Maryland Chapter.

## Recommendations

The Maryland Chapter had 17,737 members as of November 2020 and a Conservation Program that embraces the Conservation Chair, a Conservation Committee that is a Chapter standing committee with about 20 members, and Issue Teams. The Conservation Chair position is currently vacant and the ConsCom has been inactive as a result. Aside from National staff on Beyond Coal, the Chapter has only one staff member dedicated to a conservation issue, so is reliant on volunteer leadership for many issues. The analysis was informed by surveys of ConsCom members, Group representatives, and Issue Team Chairs; a review of governance documents; and interviews with former Conservation Chairs.

The governance structure should be based on the Chapter's needs, not the other way around. In developing these recommendations, we first looked across the Chapter to identify the important objectives and responsibilities critical for success, and then defined the governance structures we thought would best accommodate them. Below, the Task Force offers four recommendations, one each for: the Conservation Chair/Steering Committee; Issue Teams; Issue Contacts; and other entities (Groups, ExCom, Staff).

**RECOMMENDATION #1:**

*The Conservation Chair and a Conservation Steering Committee work as a team to implement their joint responsibilities*

- The Role of Conservation Chair is to coordinate and facilitate; recruit someone for this role who is not wedded to an issue and has organizational and interpersonal skills.
- The Steering Committee of 3-7 people and Chair work as a team, with allocation of specific responsibilities to each member.<sup>a</sup> The Steering Committee members are the voting members of the Conservation Committee, a Chapter standing committee whose members require approval by the ExCom on an annual basis. The Steering Committee members will have key organizational functions within the Conservation Program, and should not primarily be engaged on a single issue. They may be paired as a “mentor” with specific Issue Teams.

**Key responsibilities****(1) Recommendations to the ExCom**

- Chapter positions on new and emerging conservation issues, recommendations for legal action
- Coordinate planning across the Issue Teams & Campaigns for submission to the ExCom
- Budget and staff needs for the Conservation Program
- Regularly brief the ExCom and staff on implementation of the Conservation Program

**(2) Conservation program internal operations**

- Ensure exchange of information among teams, campaigns, group conservation activities
- Identification, vetting, and appointment of Issue Team and Campaign Chairs
- Mentor/support Teams and Campaigns that are having problems – help them to fix the problem
- Respond to requests for advice from Group conservation programs
- Delegate incoming requests, as appropriate to Issue Teams/Campaigns
- Participate in Chapter legislative activities as specified in the Chapter’s standing rules

**(3) External Relations**

- Point of contact for the public
- Participate in coalitions/collaborate with other organizations (in consultation with Issue Teams)
- Approval of sign-on letters, in consultation with an issue team or contact, if one exists<sup>b</sup>
- Vet Chapter comments on conservation issues before submitted to external agencies

**(4) Reporting/record-keeping:**

- A record of all decisions
- Annual summary of the achievements of the Conservation Program

- a. These responsibilities may be managed through “subcommittees” within the Steering Committee, as in the Colorado Chapter. The responsibilities are distributed across the team, reducing the load for any one person, and will create more leadership opportunities
- b. The Conservation Committee would have final say on sign-on letters, with respect to their consistency with national Sierra Club policies and in consultation with an issue team or contact. The ExCom’s role is to act on recommendations by the ConsCom for positions on new or emerging issues.

## Rationale

This recommendation addresses a number of weaknesses identified in the current Conservation Committee structure.

- **It isn't necessary for people working on conservation issues to be approved by the ExCom in order to participate in a Chapter-wide meeting on the conservation program.** The current Conservation Committee is large and formally appointed by the ExCom, but is not a decision-making body. Its primary purpose appears to be to information-sharing on a quarterly basis and coordination of annual goals and work programs. Requiring a representative from each Group creates a new obligation for Group leadership, which is often thinner than the Chapter leadership. Many of the chapters interviewed for this report convened periodic meetings of all conservation actors without creating an obligation or having the Chapter formally appoint them to a committee.
- **The current set-up has facilitated information-sharing among the Issue Teams and Groups, but not between the ConsCom and the ExCom or staff.**
- **The existing structure leaves out a lot of important functions of the Cons Com performed in other Chapters, that fall on the shoulders of Chapter staff or the ExCom -- vetting new conservation policies or comments, decisions on sign-on letters, participation in coalitions, and briefing the ExCom.** Chapter bylaws deliberately require the ExCom to delegate many of these responsibilities to a Conservation Chair to free up the ExCom to act in an approving role when recommendations from the ConsCom are sent.
- **The existing structure has not facilitated "hands-on" support for the smooth operation of Issue Teams,** and the quarterly meetings are not frequent enough to provide timely information to the ExCom of developments in the implementation of the Conservation Program.
- **Addressing these needs requires more help than a Chair or Co-chairs can provide!**

The Recommendation creates a smaller and nimbler Conservation Committee that functions more like a Steering Committee for the Conservation Program that consists of the Conservation Chair and 3-7 others who collectively ensure that the responsibilities are covered. They can be assigned across the Steering Committee to individuals, or to "subcommittees" within the Steering Committee.<sup>58</sup> It expands the responsibilities of the ConsCom and also the number of people to ensure it gets done. The team still acts to support and mentor Issue Teams. We've added a reporting and record-keeping requirement, but resisted commenting on how often they should meet and how to allocate the responsibilities.

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<sup>58</sup> The Colorado Chapter operates its Conservation program through this arrangement, including subcommittees charged with specific tasks. That Chapter operates without the benefit of any staff dedicated to the conservation program.

**RECOMMENDATION #2:*****Creation, Responsibilities, Reporting for Issue Teams<sup>a</sup>*****Creation of a Chapter Issue Team**

- Must have at least three people
- Must address problem in more than one county or statewide
- Chair is vetted and appointed by the Conservation Steering Committee, must have interest in the issue, organizational and interpersonal skills.<sup>b</sup>
- For a large team, a steering committee governing structure is recommended.

Teams may become more or less active, and there should be some tolerance for this. The Conservation Committee should assess the options – build up the team, ease it out, etc. Are the circumstances temporary? Consider transitioning some people to “Issue Contacts”

**Key responsibilities**

- Define the issue, research potential solutions, plan how to go about addressing it, what is needed, and execute the program
- Maintain contact with and work with coalitions on the same issue
- Review sign-on letters/draft comments for submission to external agencies on the Team’s issue, for review and approval by the Conservation Steering Committee
- Coordinate with local Sierra Club Groups working on the same issue
- Provide opportunities for SC members & the public to become informed and engaged in the issue

**Reporting:**

- Propose goals and a work program for the year
- Maintain a record of decisions
- Submit an end-of-year summary of achievements to the Conservation Committee

- a. We have deliberately left out “Campaign” as an entity because a campaign is really just one of several tactics for an Issue Team to achieve it’s short-term objectives. Neither the 2014 standing rule nor the 2018 governing principles explain the campaign vs. team responsibilities, and we can’t conceive of a campaign that isn’t rooted in a team – except perhaps for the campaigns supported by National Sierra Club
- b. May need to suggest specific job description for the Chair

**Rationale**

- The Governing Principles are silent about the formation of Issue Teams and have the team members elect their Chair, while the 2014 standing rule sets a minimum number of people (3) and assigns responsibility for vetting and appointing Issue Team Chairs to the Conservation Chair and Committee. This recommendation is based on the standing rule.
- It’s proposed that the Conservation Committee have jurisdiction on decisions concerning the formation or dissolution of Issue Teams and appointment of Chairs. This has been the norm since the 2014 standing rule, when the Conservation Chair appointed the Team Chairs, and it’s also common in other Chapters, with half of them assigning management of Issue Teams to the Conservation Committee. The Conservation Committee is the structure that has the expertise about the issues, the context, and that is familiar with team members and their activities – not the ExCom.

Issue Teams are not standing committees of the ExCom and their members do not need to be approved by the ExCom. In fact, we found few if any examples in which the ExCom appointed the

- We introduce a modest reporting requirement, but resist the temptation to define a minimum standard based on the number of meetings, as it is a poor indicator of the degree of effort or results.
- This fulfills the request from Issue Teams for more guidance on governance of the team.
- The Governing Principles currently require designating someone for recruitment within in every team, while most teams don't have any other officer except the Chair and not even a secretary to keep track of the minutes and action items. Issue teams by their own actions and activities will bring more people in. The Chapter needs to take the lead in more targeted recruitment and putting interested members in touch with the appropriate team.

### RECOMMENDATION #3:

#### *Activate a Volunteer Role: Issue Contact*

- This position was already authorized by the ExCom in the 2014 standing rule, as a “subject matter expert, information resource, and, when approved, as a spokesperson for the Chapter on that issue.” This position can be activated for individuals within a team and when it's an issue with no Issue Team.
- This is the person who is the point of contact on an issue for Chapter leaders, members, or the public on a specific issue.
  - If there's an Issue Team already in existence with a Chair, then the Chair would be the Contact for that Issue.
  - If there is expertise on a more specialized issue *within a Team* (for example, the composting lead within the Zero Waste team), then that person would be the Chapter's Issue Contact for Composting working within a team.<sup>a</sup>
  - If there are issues not currently covered by a team, this would be someone whose expertise can be tapped.<sup>b</sup>
- Issue Contacts are appointed annually by the Conservation Committee

#### Responsibilities

- Keep abreast of the issue and monitor new developments
- Maintain familiarity with Sierra Club policies related to the issue
- Serve as a source of information and technical advice on the issue for the Chapter (through the Conservation Committee and any related Team)
- Participate as a member of an Issue Team that encompasses this issue, if one exists
- Participate on behalf of the Sierra Club in a coalition when authorized by the Conservation Committee
- Serve as a spokesperson for the Chapter on the issue when authorized by the Conservation Chair.<sup>d</sup>

#### Reporting

- End-of-year summary of activities and achievements to the Conservation Committee

- a. Other examples – a person within the Transportation Team who is the “go to” expert on electric vehicles; a person within the Natural Places team who is the expert on invasive species
- b. The 2014 standing rule says: “If a campaign within the Issue area is identified and approved by the Conservation Committee, the Issue Contact can serve in the role of Issue Chair or Campaign Chair, or a new person can be recruited to focus on the organizational functions while the issue contact transitions into a role as a member of the issue committee or campaign committee.

- c. From the 2014 standing rule: “For issues we are monitoring, the Conservation Chair will determine if the issue lead can speak on behalf of the Chapter in regard to that particular issue....Other members may be designated by the Chapter Conservation Chair or Chapter Director as spokespeople for the Chapter on a given Issue.”

#### Rationale

- There’s currently no role for individuals who want to work on an issue that doesn’t have a Team (whether an expert or not). The survey noted disappointment and undervaluing of volunteers that had been working on issues for an extended period that were dismissed. This role was already approved by the ExCom in the 2014 standing rule, which remains in effect.
- These individuals follow an issue and can provide a valuable service to the ConsCom in the event that it surfaces for Chapter comment or action. If an issue becomes “hot,” a team may form.

### RECOMMENDATION #4:

#### *Roles of other actors in the Conservation Program*

##### Role of the ExCom

- Recruit and appoint the Conservation Chair
- Appoint members of the Conservation Steering Committee, a Chapter standing committee of 3-7 people, with input from the Conservation Chair
- Request and act on the advice/recommendations of the ConsCom on: policies concerning new and emerging conservation issues; proposed Chapter conservation goals, program, and budget; and legal action

##### Role of Chapter Staff

- Recruitment, “in-boarding” of volunteers
- Technical support to the ConsCom, Issue Teams
- Communications, website, action alerts, and training support to the Conservation Program
- Conservation staff support, communicated through requests to the Issue Team Chairs and the Conservation Chair.<sup>a</sup> Staff time is allocated based on priority recommendations of the issue Teams and Conservation Committee, as approved by the ExCom.<sup>b</sup>
- Staff of National campaigns operating in Maryland must maintain regular contact with any Issue Team covered by their topic, to coordinate activities.<sup>c</sup>

##### Group Conservation Responsibilities<sup>d</sup>

- Groups develop and conduct their own local conservation campaigns
- Not required to consult with the Chapter Conservation Committee prior to undertaking a campaign, *but should inform them for purposes of coordination*
- *Must be in regular communication with any Chapter Issue Team working on the same issue to coordinate messages and actions between Chapter and Groups.*
- May raise money locally for their campaigns; may apply for Grassroots Network Team Grants, but must coordinate with the Conservation Chair before applying
- Can request Chapter support
  - from the Chapter Conservation Committee or appropriate Issue Team Chair campaign planning.
  - *From Issue Contacts for expertise on issue*
  - from the Chapter Director for sending action alert messages or information updates to Group members

- a. Some staff are hired specifically to run a campaign on a conservation issue. Here, we're talking about requests for staff support by teams who do not have an assigned staff member
- b. This bullet is reworded, but straight from the 2014 Standing Rule
- c. There may be better wording for this, but we found other chapters where the National campaign staff had no interactions at all and operated independently of the Conservation Committee. We want them to work through the Conservation Committee in Maryland so that all are on the same page. The 2014 SR does have a paragraph on this issue of coordination with national campaigns
- d. All of these bullets are directly from the 2014 Standing Rule, except for the text in italics.

#### Rationale

- This recommendation highlights the responsibilities of other entities for the Conservation Program.
- The Governing Principles do not explicitly explain the relationship between Group conservation activities and the Chapter conservation entities, what Groups can expect from the Chapter. This language was pulled from the 2014 standing rule, which is already approved.
- In the surveys, Group representatives asked for a vehicle for better communication across Groups. We suggest that this could be best addressed via a Group Chair listserv and initiative by the Groups to have quarterly discussions.

## Appendix A: List of people interviewed and/or surveyed

### Maryland Chapter

#### Chapter Leadership

Rosa Hance, Chapter Chair  
Josh Tulkin, Director

#### Former Conservation Chairs

Lynn Davidson  
Sydney Jacobs  
David O'Leary  
Dorren Paster

#### Issue Team Leaders

Brian Ditzler, Transportation  
Lily Fountain, Natural Places  
Julie Klinger-Luht, Beyond Coal  
Katie Mettle, Public Health (former)  
Kathy Michels, Synthetic Turf  
Sylvia Tognetti, Water  
Ruth Alice White, Beyond Gas

### Other Chapters

#### Colorado Chapter

Ramesh Bhatt, Conservation Chair

#### Grand Canyon Chapter

Sandy Bahr, Director  
Don Steuter, Conservation Chair

#### Loma Prieta Chapter

James Eggers, Director  
Katja Irvin, Conservation Co-Chair  
Bruce Rienzo, Chapter Chair

#### Massachusetts Chapter

Robert Kearns, ExCom member  
Deb Pasternak, Director

#### Group Leaders

Doug Arnall, Washington County  
Earl Bradley, Anne Arundel  
Thomas Brewer, Southern MD  
Na'ilah Dawkins, Prince George's  
Janet Gingold, Prince George's  
Ron Kaltenbaugh, Catocin  
Amy Maron, Montgomery  
Susan Olsen, Lower Eastern Shore  
Carolyn Parsa, Howard

#### Other ConsCom

Marc Imlay  
Mark Posner, Legislative Chair  
Rich Reis

#### Michigan Chapter

Carol Graham, Conservation Chair  
Gail Philbin, Director  
Anne Woiwode, Chapter Chair

#### Mother Lode Chapter

Sean Wirth, Conservation Chair

#### New Jersey Chapter

Greg Gorman, Conservation Chair  
Rich Issac, Chapter Chair

#### North Carolina Chapter

Ben Barnes, Conservation Chair  
David Reid, Chapter Chair  
Cynthia Satterfield, Acting Director

*Continued on next page...*



**Other Chapters (continued)**

**North Star Chapter**

Margaret Levin, Director

**Ohio Chapter**

Linda Sekura, Conservation Chair

**Oregon Chapter**

Debra Higbee-Sudyka, Vice Chair,  
Conservation Committee  
Lara Jones, Interim Director

**Redwood Chapter**

Victoria Brandon, Chapter Chair  
Tom Roth, Conservation Chair

**San Diego Chapter**

Richard Miller, Director

**Virginia Chapter**

Ivy Main, Conservation Co-Chair

**Wisconsin Chapter**

John Ferber, Chapter Chair