

Introduction

The Sierra Club Board of Directors has an obligation to protect the Sierra Club from harm, to ensure a safe and productive working environment for members and staff, and to foster an organization in which people want to participate in its mission.

The Affirmative Standards of Conduct (Standing Rule 2.2.6: Standards of Conduct) state that:

- i. Serving in an appointed to elected position of leadership is a privilege that can be lost either by ignoring the duty of loyalty expected of all Sierra Club leaders or by violating the following affirmative standards of conduct*.
- ii. Sierra Club leaders have an obligation to meet the following affirmative standards of conduct*, and to hold other leaders accountable to them as well, in all Sierra Club interactions with others, including in person, in writing, on email, or on the phone.

In this policy guide, a Sierra Club member is considered a Volunteer Leader (also known as Sierra Club Leader) if he or she serves as the chair or co-chair or the head of a task force, a working group, a committee, a regional group, a Chapter or Group, any recognized local activity group, or acts as co-lead on a national campaign team and has decision-making authority over said entity.

This policy should be implemented by Volunteer Leaders in response to disruptive behavior by Sierra Club volunteers, which may include disruptive behavior by other Volunteer Leaders or volunteers who do not hold a specified leadership position.

It is important to distinguish volunteers from Sierra Club employees when addressing violations of codes of conduct. Volunteers choose to perform services or undertake work without pay, and their actions are not founded on any legal obligation so to act. Volunteers are therefore treated differently in this policy guide than employees who are under an express or implied contract of hire, under which the employer has the right to control the details of work performance (California Labor Code).

This document is intended to be used for determining the action to take in response to a breach of leader expectations.

Effectively addressing these situations requires skill and consistency in application. There may be occasions when a volunteer does not respond to positive corrective action. However, failure to take action when volunteers act inappropriately is often interpreted as condoning the behavior and may result in harm to the Sierra Club entity. Spending adequate time addressing disruptive behavior is critical to the Sierra Club's overall health and productivity. Many people are

reluctant to initiate corrective action. However, prompt, fair, and equitable action will often improve the situation, while delay may allow increased inappropriate behavior and friction, making the behavior more difficult to stop.

Statement of Responsibility

Volunteer Leaders have an obligation to deal quickly and decisively with violations of the affirmative standards of conduct or actions constituting misconduct. All disputes over personal behavior that may violate the affirmative standards of conduct or may constitute misconduct should be resolved at the lowest possible level and informally whenever possible. The basic responsibility for achieving and maintaining good working relationships among volunteers lies with the Volunteer Leaders.

The chair of the relevant Sierra Club entity has an obligation to deal quickly and decisively with violations of the affirmative standards of conduct or actions constituting misconduct. Disputes over personal behavior may also warrant the removal, suspension or barring the member from leadership positions or participation in certain activities (SR. 2.2.6: Standards of Conduct).

The Sierra Club is responsible for properly training Volunteer Leaders to apply the techniques of a sound and consistent approach to modifying behavior or performance problems.

In addition, it is the responsibility of the Board of Directors to support the actions taken when a sound and consistent approach has been demonstrated, and to provide adequate resources for Volunteer Leaders to be able to handle disruptive behavior in a timely and effective manner.

The procedures herein shall not deprive the Board, at any point in the process, of its legal right to take such actions as it may deem necessary or advisable for the best interests of the Sierra Club.

Primary Goal

The primary goal is to eliminate disruptive volunteer behavior. Behavior and performance standards must relate to the work entrusted to the volunteers and volunteers should be made aware of such standards. Volunteers are expected to adhere to these standards and shall be subject to corrective action when they violate those standards. Remedies must be appropriate to the nature and impact of the disruptive behavior. Volunteers who commit serious misconduct, or who demonstrate a repeated pattern of disruptive behavior after successive efforts of corrective action, must not remain as a Sierra Club volunteer regardless of his or her contributions or level of responsibility.

Responsible Entities

- Complaints about disruptive behavior should be referred to the Chair of the affected entity, who is responsible for assessing and correcting the disruptive behavior in a timely manner. If the Chair is unable to adequately resolve the situation, the next highest responsible volunteer entity is tasked with taking action as appropriate (e.g. from Group Committee Chair to Group ExCom Chair; from Group ExCom Chair to Chapter Chair). The Group or Chapter Chair shall notify their ExCom of the action taken.
- If the disruptive behavior cannot be corrected despite repeated oral warnings and written notices at the Group and Chapter levels, then the matter can be referred to the Office of Chapter Support for further assessment or action.
- Complaints about disruptive behavior of volunteers at the national level shall be referred to the appropriate Coordinating Pair: Campaigns and Programs, Chapter Support or Grassroots Network.
- Complaints about disruptive behavior for national outings volunteers should be referred to the National Outings Quality Improvement Committee.
- Volunteers can also go directly to the Office of Chapter Support for assistance.
- Volunteers should contact the Human Resources Department if staff is involved.

These entities may delegate resolution to entities reporting to them or to other appropriate Sierra Club entities.

Purpose and Practices

Ensure Uniformity of Corrective Action – The steps outlined herein are to be followed when applying corrective action for disruptive conduct by volunteers after oral and written warnings have failed.

Ensure Fair Treatment – The process detailed in this document is designed to ensure fair treatment of all volunteers to prevent impulsive and unreasonable actions in response to disruptive volunteer behavior.

Define the Problem – Initial problems may be minor violations and not easily definable. However, such behavior should be addressed immediately as it can grow more serious over time. A private one-on-one talk with the volunteer can often resolve the problem and gives the individual an opportunity to correct the behavior.

What Constitutes Disruptive Volunteer Behavior?

1. Engaging in misconduct:
 - a. Misconduct as defined by Standing Rule 2.2.6; or
 - b. use of slurs, epithets, threats, intimidation, stereotyping or derogatory language regarding race, ethnicity, national origin, color, religion, gender, sexual orientation, gender identity, gender-related appearance or behavior, pregnancy, age, mental or physical ability, or any other characteristic protected under applicable law etc.; or
 - c. misrepresentation of Sierra Club policy or position; or
 - d. illegal or unethical professional conduct outside the Sierra Club if that misconduct could significantly damage the Sierra Club, its staff, its members or its assets; or
 - e. behavior that jeopardizes the safety of other volunteers, staff, or the public.
2. Engaging in Sexual Harassment as defined by Standing Rule 2.2.7 or otherwise violating the Sierra Club's policy on discrimination, harassment, bullying and retaliation;
3. Significantly undermining the work of volunteers or staff by repeatedly creating a public misimpression about the Sierra Club, its positions, or its policies;
4. Being repeatedly hostile or harassing of others, causing others to become fearful, apprehensive, or reluctant or unwilling to participate in Sierra Club activities with that member;
5. Significantly disrupting or impairing the work of the Sierra Club, or taking actions that will significantly disrupt or impair it if the actions continue or,
6. Embezzling, misappropriating, or misdirecting Sierra Club funds, membership lists or other assets for activities not authorized by the responsible entity.

Addressing the Situation

The appropriate steps for a Volunteer Leader to follow in taking action to address disruptive behavior are outlined below. For advice and guidance related to these procedures, please contact your Chapter's National Chapter and Leadership & Capacity Building Support Team liaison or your national team's Coordinating Pair.

1. Conducting an Assessment: Assessing behavior that may require corrective action should be initiated by the Volunteer Leader of the responsible volunteer entity. This should be undertaken as quickly as possible after the disruptive behavior was exhibited. The Volunteer Leader shall conduct a thorough and fair assessment of the situation and obtain all available facts, including the volunteer's side of the story. If the assessment shows that action is warranted,

corrective action commensurate to the degree of the offense violation should be undertaken.

2.Purpose of the Assessment: The purpose of the assessment is to ensure that the Volunteer Leader has considered all relevant facts by: a) reviewing available written documentation including complaints; b) contacting other persons who may have knowledge of the situation; c) determining the applicable behavioral standards, rules, and policies; d) reviewing past records of the volunteer's behavior; and e) discussing the findings with the volunteer to obtain the volunteer's perspective. The discussion should be in private and informal. This is NOT meant to be an adversarial proceeding. It does not require calling of witnesses or formally presenting a complaint. The Volunteer Leader should prepare a written record of the private meeting with the volunteer.

3.Emergency situations: Circumstances may occur that require the removal of the volunteer from the situation before final decisions can be reached on corrective actions to be taken. This can include misconduct as defined by Standing Rule 2.2.6 or behavior that jeopardizes the safety of other volunteers, staff, or the public. The Volunteer Leader should notify the Volunteer Leader at the next highest level in this situation, or the Office of Chapter Support, if immediate suspension from an elected position is necessary.

4.Factors to Consider: The decision on whether to take action and the form of such action requires consideration of several factors: a) Sierra Club standards of conduct, anti-harassment policy, and other policies; b) history of past actions taken related to the volunteer in question; and c) the seriousness of the behavior even if it is a first offense.

5.Legal Consultation and/or Consistent Application: The entity may request advice on matters that require legal interpretation or advice on consistent application of Sierra Club policies from Human Resources. This should be done through the Office of Chapter Support.

Implementing Corrective Action

In most circumstances, corrective actions should be administered as noted below, as quickly as possible:

- Verbal Warning: This conversation should be conducted in private and, if appropriate, on a one-to-one basis between the volunteer and the Volunteer Leader. Explain to the volunteer the standards and rules, what is expected in the future, and the possible consequences if the behavior is not corrected. Document the conversation. In some cases, a memo to the volunteer summarizing the discussion and verbal warning, including what was agreed, may be in order.

- Written Warning: If the behavior persists, a written warning should be given to the volunteer along with documentation of previous incidents requiring attention, reference to the relevant policies, and the consequences for repeated behavior. Examples of appropriate corrective actions include: asking the volunteer with disruptive behavior to step aside from their position; requiring the volunteer to demonstrate full cooperation on a group task or project; requiring the volunteer to demonstrate behavior free of harassment, removing the volunteer from one or more leadership positions. Have the volunteer sign the written notice to acknowledge receipt of the warning. If the volunteer refuses to acknowledge receipt, indicate that fact on the document.

- Refer the Matter: If the oral warning and written notice fail to remedy disruptive behavior, the matter shall be referred to the Volunteer Leader of the next appropriate volunteer entity. At each level, the Volunteer Leader shall clearly convey what actions must be taken to modify or remedy the disruptive behavior and shall clearly convey that failure to honor the resolution agreed to can be grounds for removal of a volunteer from leadership positions and/or termination of membership in the Sierra Club.

- Removal of volunteers from appointed leadership positions: The Chapter or Group Executive Committee may appoint and remove officers, representatives, and committee members at any time. While a Chapter or Group ExCom may remove a leader from an appointed position, only the national Sierra Club may remove a leader from a position elected by the membership. This removal request is handled according to procedures spelled out in Standing Rule 5.10.2.

- For those matters that cannot be resolved locally, the Board delegates the authority for termination of Sierra Club membership or suspension of member privileges, including the privilege of serving in elected or appointed Sierra Club leadership positions, to the Executive Director, Sierra Club President, and chair of the Board Volunteer Leadership Advisory Committee. Standing Rule 5.10.2 spells out the rules governing this process, which is handled by the Office of Chapter Support.

Although the above process will generally be followed for corrective actions, the Sierra Club reserves the right to exercise discretion and to use more severe corrective actions, including immediate termination of Sierra Club membership and volunteer privileges.

***Affirmative standards of conduct:**

(A) Communicate and work together toward shared interest with common courtesy, solidarity, mutuality, and respect; work across difference and disagreement.

(B) Create a welcoming and inclusive environment for new members, visitors, guests, staff and volunteers. Avoid cliquishness, behavior that fosters an “insider”

vs. “outsider” culture and language (including humor) or behavior that is harmful, toxic, or offensive. Seek to welcome and engage people who reflect the diversity of the community.

(C) Always represent Sierra Club and its mission in a positive and proficient manner, keep disagreements within the Sierra Club, and limit the impacts any internal disagreements may have on external partners and allies.

(D) Accurately present Sierra Club’s policies and positions when communicating on behalf of Sierra Club; don’t use a Sierra Club leadership role or title to advance personal views that are not consistent with Sierra Club’s positions and policies.

(E) Respect Sierra Club members’ confidentiality; use member lists and information about members for Sierra Club purposes only.

(F) Use Sierra Club resources wisely and in keeping with the fiduciary responsibility of all volunteers.

(G) Foster an open democratic decision-making process; respect decisions once they are made. Wherever possible, seek opportunities to create amicable clarity about decision-making, sharing strategies, and resource distribution.

(H) When speaking of other Sierra Club volunteers praise publicly, criticize privately and tactfully.

(I) Encourage robust dialogue and debate and seek to resolve differences with other Sierra Club volunteers, avoiding factionalism and/or behavior that exacerbates or prolongs conflict.

(J) Respect the policies and procedures that have been established by and for members and volunteers engaged in specific Sierra Club activities; when in doubt, ask.

(K) Show and hold respect for colleagues at all levels; demonstrate humility, empathy, and patience; and hold oneself and others accountable for collaborating with internal and external parties in a just and inclusive manner.

(L) Foster a work and volunteer atmosphere that promotes equal opportunities and prohibits discriminatory practices, including prohibited discrimination, harassment, and bullying.

Relevant Sierra Club Policies

SR. 2.2.6: Standards of Conduct

<https://community.sierraclub.org/page/standards-conduct>

SR. 5.10.2: Termination of Membership or Suspension of Member Privileges

<https://community.sierraclub.org/page/termination-membership-or-suspension-member-privileges>

Financial Reporting Hotline

<https://secure.ethicspoint.com/domain/media/en/gui/37792/index.html> (link is external)

Sierra Club Policies on Harassment, Discrimination and Bullying as set forth in
Employee
Handbooks

<https://community.sierraclub.org/section/capacities/human-resources/empl...>

Outings Resources

http://clubhouse.sierraclub.org/outings/local/chair/complaint_procedure....