

SURFRIDER LEADERSHIP ACADEMY — WASHINGTON COAST

GUIDEBOOK

MARCH 2018

Providing a pathway for coastal citizens to become conservation leaders through skill development, collaboration and networked relationships

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INTRODUCTION

LEADING A COASTAL CONSERVATION REVOLUTION

After a successful pilot in 2015, the full Surfrider Leadership Academy program was offered first in 2016 and again in 2017. Eight participants completed six months of training, which included retreats, virtual trainings and a group project that ended with a final presentation. Graduates from each year mentor and facilitate subsequent programs, creating a growing network of academy alumni.

Surfrider Leadership Academy's model is rooted in the work of Marshall Ganz, who believes that the most effective way to create change is through collaboration, collective action and the power of story. Each participant learns a networked leadership approach, leveraging the power of shared story and alliances in today's connected world.

After completing its third year, the Surfrider Leadership Academy continues its mission of building a growing network of conservation-minded leaders and activists along the Washington coast and aims to build off this considerable momentum in 2018.



INTRODUCTION

ANNUAL UPDATE



Stuart Coleman sharing his personal story of self with the cohort.

You know the saying: Another year, another fantastic Surfrider Leadership Academy! The class of 2017 demonstrated impressive development of their skills and ability to engage their community in the short period of time they were together, culminating in a really interesting group project that is teeming with potential.

We had a great amount of interest in this year's academy. Many impressive individuals applied, making the selection process very difficult, which is a good problem to have! After much deliberation we finally settled on and offered the opportunity to eight individuals (see page 5).

Like the previous two years, our first retreat was held at Lake Quinalt. For this year's program, we had a guest expert for each of the three retreats. At Lake Quinalt, we were fortunate to have Surfrider's Hawaii Field Manager, Stuart Coleman, join us. Stuart is also a published author and has written "Eddie Would Go" and "Eddie Aikau - Hawaiian Hero." He was a natural fit to train the cohort on storytelling and specifically on the process of developing and refining Stories of Self.

Several weeks later, the Surfrider Leadership Academy reconvened for their second retreat in Cathlamet in conjunction with the annual Coastal Marine Resources Committee (MRC) Summit. The primary objective of the retreat was to define their group project and share it with the community, in this case the coastal MRCs, to gather feedback. As this would require speaking before a sizable crowd of stakeholders, and potentially elected officials, we brought Washington Policy Manager Gus Gates in to educate the cohort on best practices for public speaking and to provide legislative engagement tips. They put these skills to the test the following day as they presented their project prototype. After receiving great feedback from the attendees of the MRC Summit, they had just over a month to refine the project into a final product that they could present to their peers at the final retreat.

In December, the group traveled to Port Angeles for their third and final retreat. When they arrived, they still had considerable work to do on their 90 minute presentation. For this retreat, our featured expert was Liz Banse with Resource Media, who provided her expertise on fast pitch presentations, video storytelling and general guidance as they prepared for their final presentation.

Finally, the big day arrived. Three years into the Surfrider Leadership Academy, the energy, visibility, and interest reached a critical mass, demonstrated by the large and diverse crowd that attended the final presentation. The leadership cohort began by sharing their personal stories, called 'Story of Self' before explaining why they collectively cared for their coastal communities, or 'Story of Us'. They then revealed their final pitch (Story of Now).

If you're interested in learning more about the academy, contact cdennehy@surfrider.org

Casey Dennehy

Founder & Director,
Surfrider Leadership Academy

INTRODUCTION

ANNUAL UPDATE



Stuart Coleman sharing his personal story of self with the cohort.

SURFRIDER LEADERSHIP ACADEMY CLASS OF 2017

(LEFT TO RIGHT):

Natalie Lord - Aquatic Reserve Manager for RE Sources for Sustainable Communities

Rebecca Blasko - Human Resources Director for the Adrift Hotel

Kyle Deerkop - Shellfish Farm Manager for Coast Seafoods

Johannes Ariens - CEO of LOGE Camps

Deborah Moriarty - Administrator for the National Marine Sanctuary Foundation

Audrey Lamb - Biological Project Manager with Taylor Shellfish

Sarah Bisson - Grant Coordinator and Development Officer for the City of Ocean Shores

Daniel Ravenal - Environmental Protection Manager for the Quinault Indian Nation

If you're interested in learning more about the academy, contact cdennehy@surfrider.org

Casey Dennehy

Founder & Director,
Surfrider Leadership Academy

INTRODUCTION

DESIGN PRINCIPLES

SURFRIDER LEADERSHIP ACADEMY IS BASED ON FOUR GUIDING PRINCIPLES. THESE AREN'T SET RULES—THEY PROVIDE DIRECTION TO ALLOW FOR AUTONOMY AND CREATIVITY GIVEN THE CONSTRAINTS AND OPPORTUNITIES THAT INEVITABLY ARISE:

**1. THE PROGRAM SHOULD BE
CONTEXT-SPECIFIC**

Focus on developing the skills that will make the biggest difference in participants' leadership on the coast.

**2. BUILD ON WHAT'S ALREADY IN
PLACE**

Align the program with existing coastal and Surfrider events (e.g., the MRC Summit) as well as encouraging the group's project to take on a timely issue.

3. CONNECT TO REAL LIFE

Support participants in applying what they learn in the program to their everyday life and work.

4. ENGAGE THE COMMUNITY

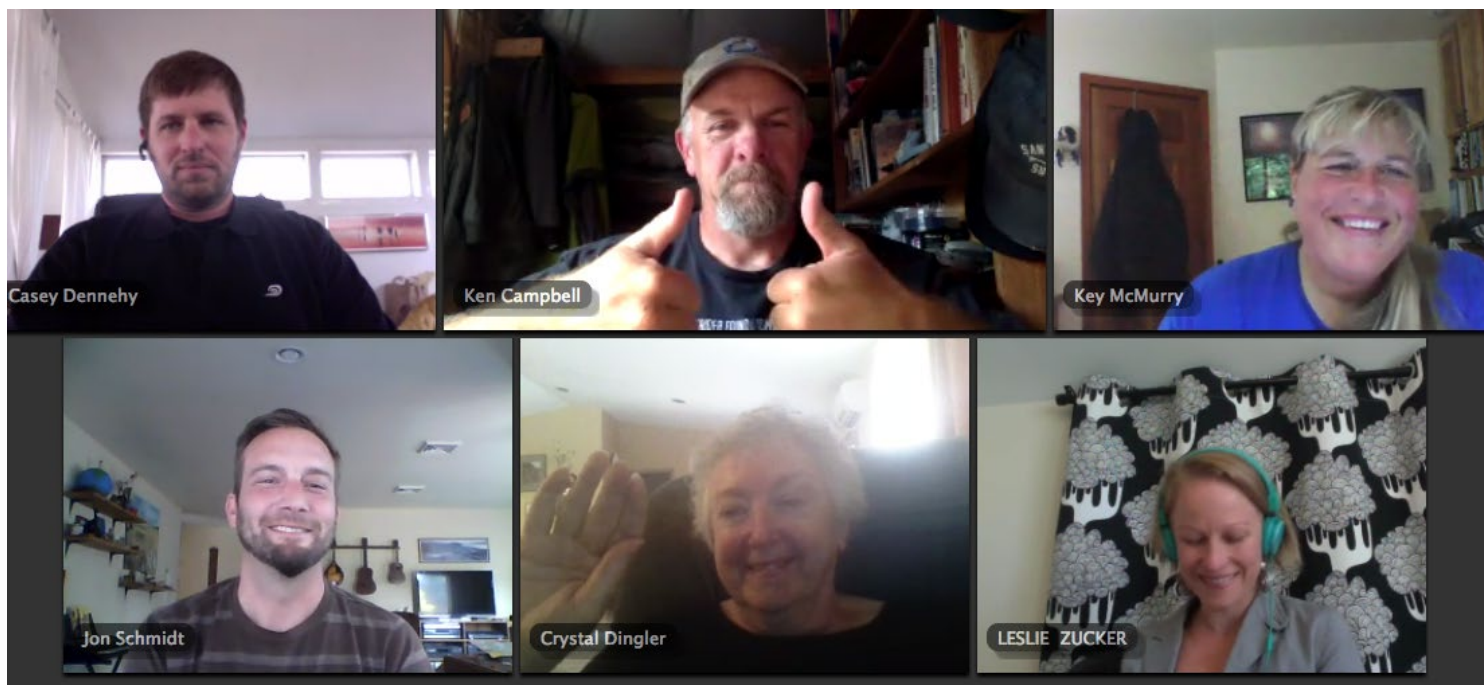
The Surfrider Foundation leadership, advisory board, alumni, participants' organizations, funders and people from the community are all invaluable sources of expertise and insight.

INTRODUCTION

WHAT INFORMED THIS GUIDEBOOK

This guidebook has been informed by the original discovery and design process and three years of running the Surfrider Leadership Academy; a shortened pilot program in 2015, and full 6-month versions in 2016 and 2017. The discovery and design process involved several months of immersion in the community, attending Marine Resources Committee (MRC) and Washington Coastal Marine Advisory Council (WCMAC) meetings, holding informal meetups with community leaders and hosting design sessions with key influencers who weighed in on prototypes of the program. That thoughtful process of discovery and design helped create a program that's focused, above all, on the coastal community's needs and motivations. After three years we have taken note of several ways to improve the product and experience for the participants. None of the changes were major, but the result is a more refined and mature academy.

SLA participants attending a 2015 virtual training.



INTRODUCTION

ORIENTATION

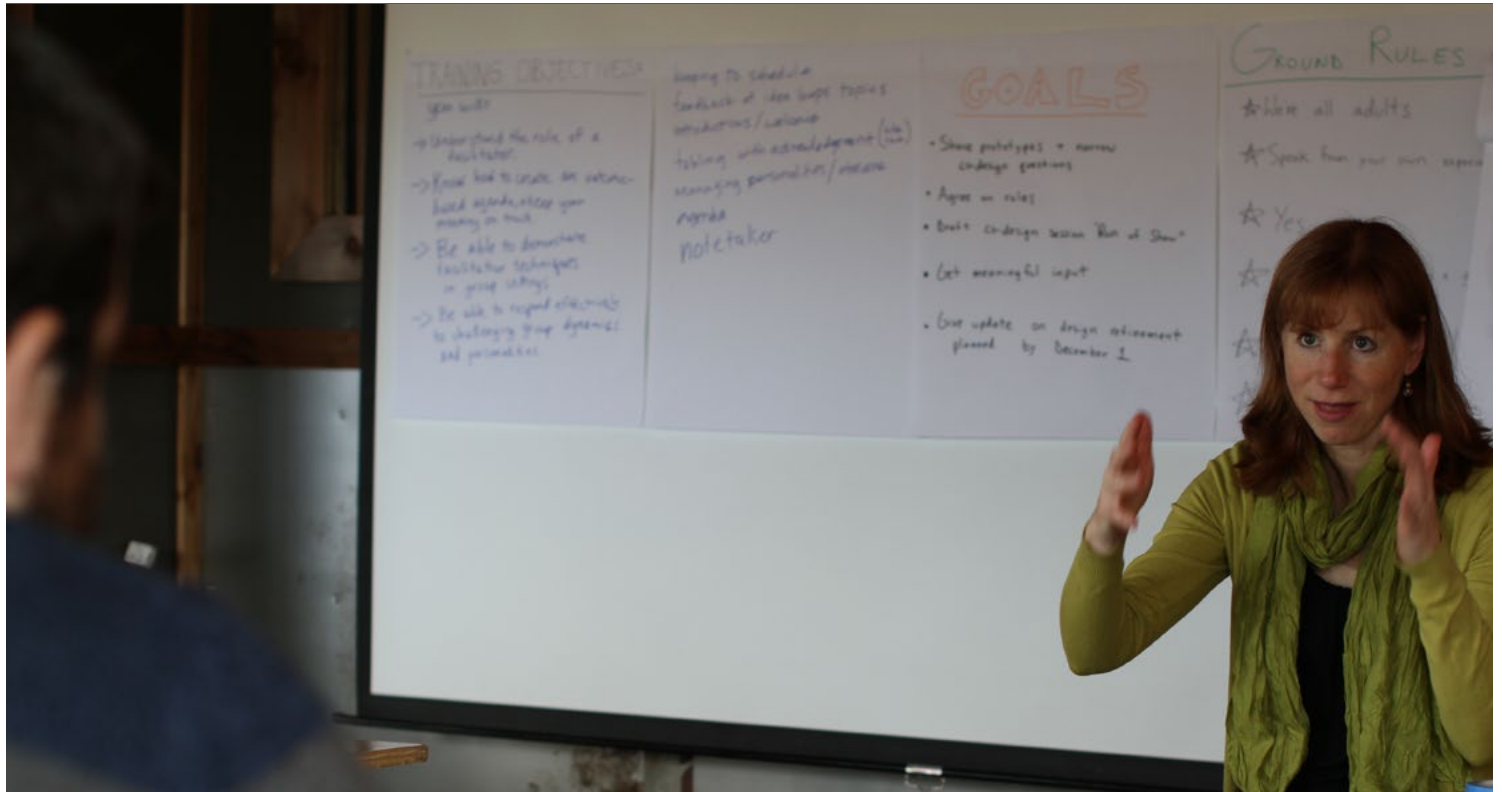
This guidebook is your resource for implementing and running the Surfrider Leadership Academy. The goal of the guide is to provide tips, tools and timelines—everything you need to adapt the program to your community.

Along with step-by-step guidance, you'll also find references to ready-to-use tools developed while designing and running the program. All tools are referenced in red in the left margins.

Keep in mind that this guidebook was designed to be a living document. It's intended to provide structure for creating your own program, but it's also a resource for anecdotes, tips and insights shared among Surfrider staff and chapter members, which help to evolve the program over time.

THE PROGRAM

ACADEMY GOALS



SURFRIDER LEADERSHIP ACADEMY HELPS COASTAL CITIZENS BECOME STRONGER CONSERVATIONISTS AND MORE EFFECTIVE LEADERS BY:

PROVIDING LEADERS WITH ESSENTIAL SKILLS

All effective leaders start with a foundation of soft skills like self-awareness and collaboration, as well as hard skills like presentation, facilitation and planning.

DEVELOPING A SHARED PURPOSE

Leaders work collaboratively to identify the needs and opportunities that best serve the broader community of coastal citizens, zeroing in on a clear, common goal that takes the form of a group project.

BUILDING LASTING RELATIONSHIPS

The best way to connect and mobilize a network is by cultivating a deeper awareness of how people live in the community and how each of its members can champion the cause.

THE PROGRAM OVERVIEW

SURFRIDER LEADERSHIP ACADEMY 2017

After identifying an opportunity to develop leaders who could work together in tackling the Washington Coast's biggest challenges, Surfrider and Context Partners piloted a coastal leadership program in 2015.

In 2016 and 2017 we ran fully fledged programs, and branded it as the Surfrider Leadership Academy. Each year has been successful and unique, with numerous insights and lessons that we have learned from and built into each new iteration.

By the numbers:



8 PARTICIPANTS



3 VIRTUAL TRAININGS



3 IN-PERSON RETREATS

There are two core components of the Surfrider Leadership Academy: **a networked leadership approach** and **the curriculum arc**.

NETWORKED LEADERSHIP

Impacting coastal conservation isn't likely to happen under a traditional command-and-control leadership style. Networked leadership recognizes that there is no one-size-fits-all approach to solving problems. To be effective in today's changing world, leaders must have the awareness, confidence and tools to make decisions based on changing relationships and situations. Networked leaders view themselves as facilitators, able to organize, motivate and reward a group of people toward pursuing a long-term vision.

CURRICULUM ARC

To take networked leadership from theory to practice, we use the Public Narrative framework developed by Marshall Ganz. Ganz tested this framework while working on the front lines of the civil rights and farmworker movements of the 1960s and '70s, as well as in 2008 for the grassroots effort behind Barack Obama's historic presidential campaign.

Ganz's framework uses the power of story to develop leadership skills and build movements. When individuals tell their personal stories about why they're taking action in service of a greater vision, they inspire their community, and that community in turn will inspire others to join the cause.

THE PROGRAM

CURRICULUM ARC

NARRATIVE'S ROLE IN THE PROGRAM

There are three types of stories in Gantz's Public Narrative Framework, which together serve as the anchor of the program curriculum:

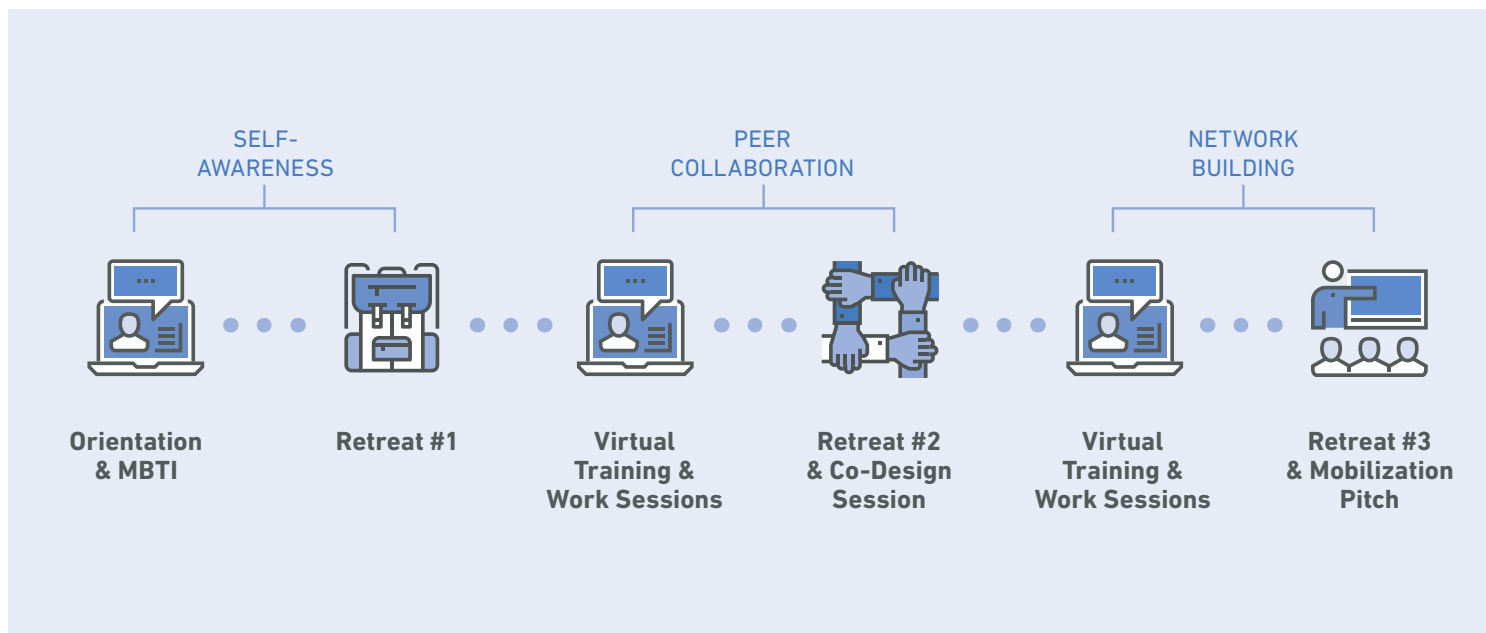
- 1 **Story of Self** – Why have I been called to do what I do?
- 2 **Story of Us** – What is our shared identity and shared purpose?
- 3 **Story of Now** – What urgent challenge will we take action on together?

Answering these questions over the course of the program will help participants build the awareness, purpose and relationships needed to practice networked leadership on the coast. Below is a table highlighting how the narrative, skills, program components and tools align.

NARRATIVE	SELF	US	NOW
CORE QUESTION	Why have I been called to do what I do?	What is our shared purpose and shared identity?	What urgent challenge will we take action on?
DESCRIPTION	We all have stories of success and failure that drive us to do what we do. Our Stories of Self weave together pivotal moments in our lives that shape who we are, why we are doing the work we do and our vision for the future.	The Story of Us articulates the shared elements of individuals' Stories of Self in a cohesive narrative. In highlighting these specific moments, beliefs, geographies or visions, this story provides the group's connective tissue.	The Story of Now builds on the Story of Us by focusing the group's shared purpose onto a specific challenge that necessitates action. This story articulates the vision and presents opportunities and incentives for others to engage.
FOCUS	Self-awareness	Peer collaboration	Network building
SAMPLE OF TOOLS	MBTI assessment Network roles Network map	Group mission statement Group project prototypes Co-design Run of Show	All training resources Discovery synthesis Mobilization pitch

THE PROGRAM

ACADEMY JOURNEY










During the Surfrider Leadership Academy, participants complete a series of virtual trainings, work sessions, and in-person retreats. Together they facilitate a co-design session, initiate a group project and deliver a final mobilization pitch. Self-awareness, peer collaboration and network building are the central themes for each cluster of activities but the curriculum incorporates elements of each at the same time. This sequence also mirrors Marshall Ganz's public narrative framework. The goal of the program is to develop leaders who will go on to create a growing network of conservation activists and collaborators.

THE PROGRAM

FLOW & TIMELINE

The curriculum arc provides the program’s foundation, but the real power comes from putting the lessons into practice.

PROGRAM STEPS	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10+
 CREATE THE CURRICULUM	Confirm specifics (reading materials, guest practitioners)	Tailor curriculum arc for cohort Draft Run of Show for VT#1	Adapt Curriculum based on VT #1 Draft Run of Show for Retreat #1	Adapt Curriculum based on Retreat #1 Draft Run of Show for VT #2	Adapt Curriculum based on VT #2 Draft Run of Show for Retreat #2	Adapt Curriculum based on Retreat #2 Draft Run of Show for VT #3	Adapt Curriculum based on VT #3 Draft Run of Show for Retreat #3			
 PLAN THE LOGISTICS	Confirm program dates, identify retreat locations, book lodging	Confirm Virtual Training and Work Session Dates	Share Retreat #1 travel and training logistics	Finalize Retreat #1 Logistics	Share Retreat #2 travel and training logistics	Finalize Retreat #2 Logistics	Share Retreat #3 travel and training logistics	Finalize Retreat #3 Logistics	Assess program budget	
 CONFIRM THE TEAM	Confirm program team, advisory board, guest practitioners	Articulate roles and responsibilities for all involved	Confirm Virtual Training & Work Sessions roles	Confirm Retreat #1 roles	Confirm Virtual Training & Work Sessions roles	Confirm Retreat #2 roles	Confirm Virtual Training & Work Sessions roles	Confirm Retreat #3 roles		
 ASSESS AND ITERATE	Define program metrics for Baseline Metrics Tool	Capture application data in Baseline Metrics Tool	Self-assessments		Survey #1	Co-design session assessment	Survey #2	Mobilization pitch assessment	Survey #3 (final) One-on-one sessions with program director	Advisory board debrief Annual survey to participants, peers and alumni
 BUILD THE COHORT	Announce program Application and selection process	Inform selected and non-selected applicants Announce cohort Send welcome packet								Next cohort search
 RUN THE PROGRAM			Orientation MBTI	Retreat #1	Virtual Training & Work Sessions	Retreat #2	Virtual Training & Work Sessions	Retreat #3 Cohort letters to selves		
 CULTIVATE THE NETWORK	Source referrals and nominations		Remote touchpoints	Guest alumni presence	Remote touchpoints	Guest alumni presence	Remote touchpoints	Mobilization pitch attendance	Publish recap story	Promotion by alumni and advisory board

PROGRAM STEPS AND TOOLS

There are seven steps for customizing and implementing the program. Each step has a set of tools and tips to keep the program relevant and adaptable.



1. CREATE THE CURRICULUM



2. PLAN THE LOGISTICS



3. CONFIRM THE TEAM



4. ASSESS AND ITERATE



5. BUILD THE COHORT



6. RUN THE PROGRAM



7. CULTIVATE THE NETWORK

PROGRAM STEPS AND TOOLS

1. CREATE THE CURRICULUM



AN EFFECTIVE LEADERSHIP PROGRAM HAS A CLEAR VISION, A UNIQUE POINT OF VIEW AND A TESTED CURRICULUM ARC. THESE ELEMENTS ARE CUSTOMIZED FOR INDIVIDUAL PARTICIPANTS, GEOGRAPHIC REGION AND THAT REGION'S RELEVANT ISSUES.

Tools

PUBLIC NARRATIVE FRAMEWORK

NETWORKED LEADERSHIP AND CURRICULUM ARC

These two elements are foundational to the program. Keeping these consistent is essential for two reasons:

- **Efficiency**
Keeping the approach and arc of the program in place year after year allows for easy replicating and scaling, saving time and money.
- **Comparable Metrics and Data**
Comparable experience data allows for deeper learning about what works in different geographies, with different groups and with different program leaders, from year to year, from community to community and from chapter to chapter. This also ensures that the Surfrider Foundation is building a consistent leadership practice throughout the culture of its network.

PROGRAM STEPS AND TOOLS

1. CREATE THE CURRICULUM (CONTINUED)

**RETREAT/WORKSHOP LOCATIONS**

Location has a big influence in shaping the experience. Selecting locations requires significant time for planning and logistics in the first few years, but should become easier in future years. Keeping retreats and workshops in the same place when possible will make planning and implementation much easier, less costly and less time consuming. It will also help ensure that participants will have comparable experiences from year to year.

For subsequent years of the program, we would strongly recommend considering the following locations:

Orientation: With an Introduction to MBTI

Given the reliance on technology and logistics, be sure that everyone has a working webcam, understands dates and times for key program events, and is clear on retreat and training logistics. The orientation also provides an introduction to Myers–Briggs Type Indicator (MBTI). Later the participants have a one-on-one call with a MBTI expert that helps them interpret the result of their personality types.

Virtual Trainings: GoToMeeting

Trainings should last an hour to 90 minutes, depending on content. Participants should be prepared to use their webcams and chat functionality. It's a good idea to have a "tech check" waiting room 15 minutes prior to each training. It is important to be flexible on the training and tailor the topics to best support the needs of group. Note that our preferred virtual meeting tool is GoToMeeting, but others can be substituted.

Retreats: Lake Quinault Lodge, MRC Summit, Final Retreat and Mobilization Pitch

For the in-person retreats, it's important to be in an environment that gets people out of their daily routine. The group needs to feel like they're taking a break from life and business as usual, in an environment that's restorative and inspiring. Lake Quinault Lodge is an ideal setting for the first retreat and it's also central for participants coming from all parts of the coast. In Washington, the second retreat should take place wherever the MRC Summit occurs, to take advantage of the audience. Consider holding the third retreat in a location where an alum is doing great work and willing to host the group. It is important to consider balancing travel for the participants. Ideally, all retreats would be centralized, but if the MRC Summit is located on the extreme north or south side of the coast, consider having the final retreat on the other side.

Group Project Work Sessions: Virtual as Needed

During the program, the cohort will likely need to work on their group project which can be achieved by facilitating virtual work sessions when necessary.

PROGRAM STEPS AND TOOLS

1. CREATE THE CURRICULUM (CONTINUED)

**Tools**[GROUP PROJECT STRUCTURE](#)[WEEKLY UPDATE EMAIL](#)[TEMPLATE](#)**GROUP PROJECT STRUCTURE**

The idea behind the group project is to apply learning from the program in a way that benefits the community. The structure of the group project encourages participants to practice specialized skills from the program. A participant tracking sheet and weekly update email keeps the participants engaged and on-track.

READINGS

Some of the readings are essential regardless of the context, while others should be tailored for each group. The first reading should focus on leadership. Subsequent readings should reflect and expand learning from the trainings and/or have relevance to the group project. For example, in the pilot we shared Harvard Business Review's Focused Leader and an article from Newsweek about the Elwha Dam removal. The HBR article provided an essential "deep dive" into the three elements of leadership development. The Elwha Dam article was selected because most of the applicants identified this event as a pivotal Pacific Northwest environmental success story. A book can also be used throughout the program. In 2016 and 2017, we read David Brooks's *The Social Animal* over the course of the program, however, we consistently had trouble discussing the book during our retreats because of time constraints and prioritizing other elements of the program, including development of the group project. For this reason, we believe it is better to use shorter articles that focus on specific elements of leadership or that may be relevant to the group project.

EXTERNAL TRAINERS

External trainers bring expertise and insights as well as broadening the group's network. Each year, the trainers supporting the program should be reevaluated. It's not essential to find new trainers each year, but there should be an intentional conversation to make sure they're supporting each new group of participants. See below for more details on what to look for and how to identify individuals who can best complement the group.

[WELCOME NOTE DRAFT](#)[PARTICIPANT BIO TEMPLATE](#)[READINGS](#)[SKILLS AND NETWORK](#)[ROLES ASSESSMENT](#)[TRAVEL LOGISTICS](#)[LIABILITY WAIVER](#)**WELCOME PACKET**

As participants are confirmed and the group is solidified, each participant should receive a welcome packet. The purpose of the packet is to encourage sharing and gathering information, but more importantly, it's an essential touchpoint for beginning a transformative experience. The packet should be personal and concise, thoughtful and clear. It should balance inspiration and information related to the year's program. You can see components of the welcome packet in the list of tools on the left.

PROGRAM STEPS AND TOOLS

2. PLAN THE LOGISTICS



**A GOOD PROGRAM IS DEPENDENT UPON THOROUGH PLANNING.
CONFIRM AS MUCH AS POSSIBLE IN ADVANCE FOR THE RETREATS,
VIRTUAL TRAININGS AND ONLINE TOOLS.**

This section is an overview of the logistics and details that create a powerful experience.

Tools

[BUDGETING SPREADSHEET](#)
[TIMELINE SPREADSHEET](#)

[RETREAT PLANNING
SPREADSHEET](#)

BUDGET AND TIMELINE

Before beginning to think of where to hold a retreat or workshop, be clear about your budget and timeline constraints. Keep a budgeting spreadsheet handy for easy access when needed.

RETREAT LOCATION

Locations should be central to your participants, yet offer a sense of “getting away,” providing a space for both work and relaxation. We recommend using the same retreat location each year when possible to save costs and increase shared experiences among alumni. Some things to look for in a retreat location:

- Quality lodging
- Workshop space
- Meal options
- Recreational activities

RETREAT LOGISTICS

Design the retreat schedule to avoid having to drive early in the morning or late at night, and to allow ample collaborative time for the team. The recommended schedule is Noon on Day 1 to Noon on Day 3. Once details are firm, provide participants with a logistics packet that includes:

- Packing list
- Travel info
- Accommodations info
- Check-in and check-out info
- Wifi info
- Retreat agenda
- Dining info
- Property map

PROGRAM STEPS AND TOOLS

2. PLAN THE LOGISTICS (CONTINUED)



Tools

[TRAVEL REIMBURSEMENT](#)[LETTER](#)[TRAVEL REIMBURSEMENT FORM](#)

REIMBURSEMENT PLAN

It is recommended that all lodging, meals and transportation costs are covered, to ensure that the program is open to all. However, there may be situations where participants can pay for part or all of their costs, with reimbursement available where needed and when possible. It is worth noting that reimbursing participants for their mileage can be costly, especially depending on where people live.

ONLINE TOOLS

With much of this program happening online, it's important to select easy-to-use tools available to all participants. The other consideration for online tools is that they may provide an opportunity for participants to broaden their online work expertise. For the virtual training platform you choose, the following should be considered:

- Webcam access
- Toll-free call-in or VOIP access
- Screen-sharing
- Chat
- Recording
- Scheduling—Doodle is an easy and free tool to coordinate selecting dates and times for calls and trainings.
- Surveys—Survey Monkey is simple and reliable.
- File sharing—Google Drive allows your team to collect and share photos, and collaborate on documents.
- Video hosting—Vimeo allows the team to share private “Stories of Self” videos with participants as well as video updates for the advisory board.
- Informal exchange—After experimenting with a Facebook group with the 2016 cohort, we decided to make the group open to alumni. Future cohorts can experiment with emerging communication tools, such as Slack, but we’ve found that group email is the most useful communication tool for participants.

PROGRAM STEPS AND TOOLS

3. CONFIRM THE TEAM



THE CORE OF THE SURFRIDER LEADERSHIP ACADEMY IS PEOPLE: THE PROGRAM TEAM, PARTICIPANTS, ADVISORY BOARD AND GUEST PRACTITIONERS. THIS SECTION DETAILS THE QUALITIES TO LOOK FOR AND WHAT IT TAKES TO TURN A GROUP INTO A COHESIVE TEAM.

PROGRAM TEAM

Select your program team with care, as they define the experience the participants will have. The team can be scaled up or down depending on the size of the leadership program. The key responsibilities your team will have in developing and implementing the program include:

- **Curriculum design**
Designing and evolving the curriculum arc and activities for each cohort should balance the participants' personal growth/discovery with highly planned and detailed activities.
- **Experience design**
Consider how the participants will experience the curriculum arc at various points in the program, including workshop location, accommodations, transportation, travel logistics, coordinating with site visit personnel, etc.
- **Facilitation**
In order to successfully guide the group through their experience, the program must have a strong facilitator. Your facilitator should have a clear understanding of the roles each person plays, and she or he should also be able to:
 - Create a safe, trusting environment in a short period of time
 - Balance curriculum goals with ongoing group needs
 - Sense how engaged the group is intellectually and emotionally
 - Synthesize themes and principles that emerge from the group
 - Provide direct feedback to participants
 - Be flexible, able to adjust the agenda and adapt curriculum on the fly

PROGRAM STEPS AND TOOLS

3. CONFIRM THE TEAM (CONTINUED)

**Tools**

ADVISORY BOARD INVITATION
EMAIL
ADVISORY BOARD EXPECTATIONS

ADVISORY BOARD

The advisory board is essential in providing an outside perspective on key components of the program, including cohort selection, curriculum advisement and final evaluation. The key considerations in putting together an advisory board are:

- Knowledge of the local community
- Understanding of leadership development
- Ability to provide honest and constructive insights

Advisory board members should have at least two of the above qualities to help ensure that your group of advisors has a diversity of perspectives.

INITIAL ORIENTATION /
WELCOME EMAIL DRAFT

PRACTITIONERS/TRAINERS

Finding the right trainers to support the program goals and share their expertise brings the curriculum to life. Trainers should represent an area of knowledge that's relevant to the curriculum. Great trainers are confident about their expertise, bringing their own ideas and content to share, but they're also curious about how to align what they know with the goals of the program. Communicate early on with potential trainers about the goals of the program, the role you need them to play and how their stories and content could tie into the larger curriculum arc.

Once you have your curriculum designed, you'll see opportunities where trainers could support skill development or enhance experiences. Identify trainer candidates and vet them for program alignment, reputation and availability.

PROGRAM STEPS AND TOOLS

4. ASSESS AND ITERATE



ASSESSING AND ITERATING THROUGHOUT THE PROGRAM IS AN INTENTIONAL PROCESS. IT BEGINS WITH IDENTIFYING METRICS, SETTING A BASELINE AND THEN MEASURING AND ADJUSTING THE PROGRAM ACCORDINGLY. AT THE END OF THE YEAR, TAKE A MOMENT TO PAUSE, REFLECT AND REFINE THE PROGRAM BASED ON THE YEAR'S LEARNING.

Tools

MBTI ASSESSMENT
NETWORK ROLES SURVEY
BASELINE ASSESSMENT
QUESTIONS

METRICS

The program features two types of measurement: assessment and tracking. Assessment is used with the MBTI and network roles questionnaires. Both of these identify individuals' preferences, which should remain relatively constant over time. Tracking, on the other hand, is used to show change, such as an increase or decrease in specific skill development and attitudes.

The assessment tools for this program have been tested and validated with statistically significant sample groups. The tracking tools we use to measure progress and growth improve with each iteration. And we're constantly seeking ways to evaluate hard-to-measure aspects of leadership such as empathy, determination and collaboration.

In previous years we have used pre-program and post-program surveys results from participants to compare changes in leadership capabilities. In the past year we expanded this to track progress over time by issuing surveys to all alumni. We intend to continue this approach so that we can demonstrate change over time and track impact, both qualitatively and quantitatively.

POST-RETREAT SURVEYS
FINAL SURVEY
ADVISORY BOARD DEBRIEF
AGENDA

LEARNING

Each time a retreat and virtual training have been completed, we conduct a survey. The final evaluation of the Surfrider Leadership Academy provides a broader picture of the lessons learned, along with suggestions for evolving the program.

SLA GUIDEBOOK

ITERATION

This guidebook should be updated based on what we learn from participants, trainers and the advisory board. It's an evolving document in that sense, a constant refining of practices and guidelines.

PROGRAM STEPS AND TOOLS

5. BUILD THE COHORT



GREAT COHORTS ARE COMPOSED OF PEOPLE WHO HAVE DIVERSE PERSPECTIVES, BUT FEEL **CONNECTED AND COMMITTED TO ONE ANOTHER BOTH PERSONALLY AND PROFESSIONALLY.**

Participants should trust one another to listen without judgment so that each feels safe to share and explore their own leadership style.

The ideal size for the program is six or eight people. This will increase the likelihood of having multiple perspectives in group sessions, but still allow the group to break out into pairs. The small size of the group is perfect for deeper relationship growth during and after the program.

Tools

PROGRAM ANNOUNCEMENT
PROGRAM PROMOTION PLAN
REMINDER EMAILS TO NETWORK
APPLICATION FORMS
(nomination, application, reference)

APPLICATION

Candidates are asked to fill out and submit their own applications as well as have another person submit information on their behalf (reference or nomination). If someone is nominated before they apply, they'll receive an email asking them to submit an application (they are not considered to be a candidate unless they complete the application form).

During this process, the program team should check in weekly to ensure that there's a diversity of candidates, and to encourage individuals who might fill any gaps (experience, geography and expertise, for example) to apply.

SELECTION TOOL
CALL AGENDA

SELECTION

The selection process should be as transparent as possible, with the selection criteria, timeline and decision-making process shared with the community. The program team should support the advisory board in identifying a group of participants who meet the criteria and create a cohesive and dynamic cohort. A scoring system has been used in the past and it is worth noting that the scoring criteria should be carefully considered and reflect the desired qualities of the participants. It is also important to understanding that the scores are not necessarily definitive and are to be used to facilitate discussion among the Selection Committee who is ultimately responsible for selecting the most appropriate cohort for the program.

ACCEPTANCE EMAIL
NOT-ACCEPTED EMAIL
PUBLIC ANNOUNCEMENT
OF COHORT

NOTIFICATION/CONFIRMATION

Once the cohort is selected, candidates should be notified and confirmed as soon as possible (there should be a deadline to accept the opportunity). Once all participants have been confirmed, notification letters should be sent out to all applicants who weren't accepted. Finally, the program team should release an official announcement so that the advisory board and the public can share and celebrate the final cohort.

PROGRAM STEPS AND TOOLS

6. RUN THE PROGRAM



ONCE LAUNCHED, THE PROGRAM SHOULD BE UNDER CONSTANT EVALUATION AND ITERATION TO ENSURE THAT IT'S BEST **SUPPORTING THE MEMBERS OF THE COHORT.**

The following should serve as a guide rather than scripts to allow for a balance of adaptability and structure within the program:

Tools

WELCOME PACKET
RUN OF SHOW
SAMPLE ORIENTATION DECK

ORIENTATION

A virtual meeting orientation should welcome the participants and cover the curriculum, logistics and introductions. Participants should feel confident about the content, structure and tools. The meeting can be combined with the first virtual training or take place as a stand-alone session.

RUN OF SHOW
SAMPLE OF TRAINER MATERIALS

VIRTUAL TRAINING: INTRODUCTION TO MBTI

The goal of this training is to orient participants to the MBTI assessment in preparation for their individual coaching sessions. The 60-minute group session should provide a balance of content sharing and interaction. Afterwards, the trainer will have one-on-one sessions with each participant to go over their individual MBTI preferences. As mentioned above, this can be combined with the orientation for a 90-minute session.

RUN OF SHOW
TRAVEL INFORMATION PACKET
TRAVEL REIMBURSEMENT LETTER
TRAVEL REIMBURSEMENT FORM
EVALUATION SURVEY

RETREAT #1

The retreats are the heart of the program. The first one is an opportunity for participants to spend time together learning, connecting with each other and renewing themselves. The program team should follow the curriculum but be ready to adapt as certain elements take more or less time, depending on the group. The retreat also needs a balance of content and space, learning and reflection, to ensure that participants aren't overwhelmed or exhausted. The Run of Show provides a sample of how this can be achieved, but it should be adjusted depending on the needs of participants. The first retreat is a great time to go deeper into the Public Narrative framework, having participants share and practice their Stories of Self and come to an agreement on the Story of Us.

PROGRAM STEPS AND TOOLS

6. RUN THE PROGRAM (CONTINUED)

**Tools**

RUN OF SHOW

SAMPLE OF TRAINER MATERIALS

(Garrett Brennan, Context Partners)

RUN OF SHOW

SAMPLE OF TRAINER MATERIALS

(Liz Banse, Resource Media)

TRAVEL INFORMATION PACKET

SAMPLE PROTOTYPES

SAMPLE INSIGHTS

CO-DESIGN RUN OF SHOW

EVALUATION SURVEY

RUN OF SHOW

SAMPLE OF GROUP TOOLS

RUN OF SHOW

TRAVEL INFORMATION PACKET

SAMPLE PRESENTATION

PRESENTATION RUN OF SHOW

FINAL EVALUATION SURVEY

VIRTUAL TRAINING & WORK SESSIONS

The second virtual training marks the beginning of the peer collaboration module. The topic should be relevant to the group and serve as a foot-hold toward their group project and co-design session at the second retreat. During the 2015 pilot, the second virtual training focused on facilitation; in 2016, it was prototyping; and in 2017 it was message development. Additional work sessions should be scheduled as needed.

RETREAT #2 (CO-DESIGN SESSION)

During the second retreat, participants immerse themselves in the community by attending the MRC Summit, sharing prototypes on their group project and facilitating a co-design session with the community. The team decides how they will proceed based on what was learned, ultimately leading to a group project that's aimed at having a positive impact on the Washington Coast community.

VIRTUAL TRAINING & WORK SESSIONS

By the third training, the cohort is often anxious to have more time to work on their group project. The training can evolve into a collaboration session where each cohort member is thinking about how to best utilize their role and skills to tap into the broader network. This is the first training in the network-building module.

RETREAT #3 (MOBILIZATION PITCH)

The third and final retreat includes one last training related to network building, followed by the group project. In 2016, a planned communications training was adapted to media pitching to fit the cohort's group project and requested skill-set.

The retreat culminates with a mobilization pitch in the form of a final presentation to the advisory board, alumni and other community members. After the closing ceremony on the last day, the participants are asked to complete a final survey and a one-on-one interview with the program director.

PROGRAM STEPS AND TOOLS

7. CULTIVATE THE NETWORK



NETWORKED LEADERSHIP IS INCORPORATED THROUGHOUT THE PROGRAM

CURRENT COHORT

There are several opportunities for participants to deepen their relationships with each other and connect with past and future groups. The program should build in unstructured time for participants to spend with other cohort members. Participants should also be asked to write a letter to themselves to be mailed six months later, reminding them of what new learning they had hoped to retain after the program.

ALUMNI

After three years, we're beginning to focus on how academy alumni can stay engaged with the program and continue collaborating with one another. In 2017 we hosted a webinar and asked alumni to complete a survey that asked how and when they would like to stay connected. A majority of them said they would like to gather semi-annually, preferably in person. And 91% of those surveyed indicated that they'd like to serve on the Advisory Board. Based on this feedback, we hope to host at least one alumni event in 2018. Other opportunities for alumni to interact include:

- Participating in retreats with specific roles
- Attending the final presentation
- Meeting up with alumni either informally or at Surfrider Foundation events
- Doing group evaluations or design sessions on the future of the program

Tools

ALUMNI SURVEY

VIRTUAL COMMUNITY

CONCLUSION OVERVIEW



Each year, Surfrider and its partners collect feedback that can be incorporated into future programs at additional locations across the Surfrider network. This learning is collected through:

- Documentation of lessons learned by the team
- Post-session surveys of program participants
- Individual final interviews with participants
- Post-session feedback from trainers
- Anecdotal feedback from program participants and team members
- Suggestions from the Advisory Board

The following recommendations should serve as guiding considerations for decision-making as the Surfrider Foundation looks to grow the program.

CONCLUSION**LEARNING & FUTURE PRIORITIES****New Insights****BALANCING STRUCTURE AND FLEXIBILITY**

When planning for the retreats and the virtual trainings, it is important to balance structure with flexibility. Developing a solid agenda for the retreats is a must in order to move the group along their journey but the facilitation team must also be nimble and make adjustments on the fly. Each cohort has been different and some spend more time on certain agenda items and others less. Facilitators need to carefully consider when to give the cohort more time and also when to guide them to quicker decision making. Similarly, the topics for virtual training sessions should be tailored to the needs of the cohort and their group project, which means that they will likely vary from year to year.

ENGAGEMENT

After completing three iterations of the Surfrider Leadership Academy we have built a substantial and growing circle of influence. We should continue to find meaningful ways to connect with the community. Alumni of the academy are instrumental in this effort. Thus far we have integrated some alumni into the fabric of the program by asking them to serve on the advisory board or as guest experts or as hosts for the retreats. In 2018 we expect to expand alumni engagement by convening the whole group and potentially by supporting the implementation of the 2017 cohort's group project.

KNOWLEDGE CULTIVATION

While participants report enjoying the program's reading list, there's an interest in diving deeper into group discussion based on the readings (and some have expressed interest in seeing the reading list expanded). Future cohorts should experiment with ways to opt-in to extracurricular readings and discussions. And the greater network could be surveyed for additional resources that apply to the group project. In that way, the program could become a cultivator of knowledge housed for the benefit of the entire coastal community.

ROLE CLARITY

Ratings of the program in general are glowing. When participants are asked how likely they would be to recommend a friend or colleague to the program, the average score hovers near 10 out of 10. Still, participants have reported that program communications and roles were sometimes confusing. In 2017, we repeatedly articulated the different roles of the facilitation team and generally had one person communicating with the cohort via email. This worked very well, resulting in much less confusion but it is recommended that future teams be aware of the potential pitfall.

VALUE ARTICULATION

We recently asked participants if they'd consider paying to be a part of the Surfrider Leadership Academy. Several respondents said they'd pay a small fee and that some of the reimbursed aspects of the program wouldn't preclude them from participating. One person even pointed out that a fee would help convey the value of the program to the participant's employer. As the program continues, the team will consider how different funding models might support the sustainability and expansion of the program.

**Past Lessons That
Continue to Resonate**

CONCLUSION

NEXT STEPS



THE FINAL PROJECT

The inaugural Surfrider Leadership Academy pilot in 2015 culminated in a session at the Marine Resources Committee (MRC) Summit in La Push, WA, where participants presented solutions on their chosen group project, marine debris. Participants in the 2016 full program focused on initiatives that would increase access to sustainable seafood for citizens living and working on the Washington coast. In both instances, valuable insight was gained by gauging the audience's reaction toward the project.

When the 2016 cohort initially presented their topic of sustainable seafood, they were met with skepticism from the community. The cohort pivoted and, on the following day, shared their Stories of Self, which helped the audience understand the passion the group had for its cause. Suddenly, the participants weren't seen as outsiders, but as members of the community. The event gave the group confidence not only in their project but also in their abilities as networked leaders.

The 2017 cohort leveraged the momentum created by the prior cohorts and proposed an initiative with considerable cross-community support. During the program they laid the foundation for a coastal video contest targeting students and they continue to work collaboratively to push the project along even after completing the program.

THE FUTURE OF THE SURFRIDER LEADERSHIP ACADEMY

In order to build upon the program's cause of creating networked leaders in coastal communities, we suggest the following next steps:

- **Focus on Alumni Engagement**

After completing three academies, we now have 22 alumni who are highly trained, passionate and eager to tackle the future challenges facing the Washington coast. We feel that it is a perfect time to further engage these leaders, further develop their network, and collectively focus on a coastwide effort. It is very likely that the group as a whole would be interested in supporting the rollout of the 2017 cohort's group project.

- **Offer the Academy in a New Region**

We are very interested in offering the Surfrider Leadership Academy in another region, depending on need and capacity. Hawaii is especially promising because Stuart Coleman, the regional field manager, understands the program since he participated as a trainer this year and he has experience and passion for leadership development. Additionally, Surfrider aims to build certain elements of the academy into Surfrider Foundation University and regional conferences.

CONCLUSION**PARTING THOUGHTS**

This guidebook is meant to serve as a living document, revised as each Surfrider Leadership Academy iteration is implemented in various coastal communities and Surfrider chapters. Ultimately, the guidebook should serve as inspiration for building a network of leaders and activists dedicated to protecting the world's ocean, waves and beaches.

The facilitation team of the Surfrider Leadership Academy would like to thank our dedicated Advisory Board without whom this important work would not be possible.

PARTNERS

The Surfrider Foundation is a non-profit grassroots organization dedicated to the protection and enjoyment of our world's oceans, waves and beaches. Founded in 1984 by a handful of visionary surfers in Malibu, California, the Surfrider Foundation now comprises more than 500,000 supporters, activists and members with more than 160 volunteer-led chapters and student clubs, and over 450 victories protecting our coasts.



Context Partners is a new type of design firm focused on relationships at scale. We create strategies that empower people, grow organizations and make lives better. Our clients face a changing world where identity, information and power are rapidly shifting. Traditional models are failing and once-passive audiences are coalescing into powerful, vocal communities. Context Partners believes organizations that build, navigate and leverage their relationships will shape the future.

RETREAT #1

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

[YEAR] Retreat #1 AGENDA

[DATE] – [DATE] // Lake Quinault Lodge

TIME	[DATE]	LOCATION
11am	Arrival Bring luggage to the Ballroom	Beach
12pm	Lunch & Introductions	Roosevelt Room
1:30pm	Opening Ceremony	Beach
2:30pm	Networked Leadership	Ballroom
3:00pm	Storytelling and the Public Narrative Arc	Ballroom
3:15pm	Story of Self Round #1	Ballroom
4:45pm	Room check-in + free time	
6pm	Dinner	Roosevelt Room
8:30pm	Campfire	Beach

RETREAT #1

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

TIME	[DATE]	LOCATION
8am	Breakfast & Opening Reflections	Roosevelt Room
9am	Story of Self w/ Guest Expert Trainer	Ballroom
9:45am	Story of Self <i>Refinement</i>	Ballroom
10:15am	Story of Self <i>Round #2</i>	Ballroom
12pm	Lunch	Roosevelt Room
1:30pm	Story of Us: <i>Finding Shared Purpose</i>	Ballroom
3:00pm	Story of Us <i>Refinement</i>	Ballroom
4:00pm	Break	
6pm	Happy Hour	TBD
7pm	Dinner	Roosevelt Room
8:30pm	Campfire <i>Discussion Topic: TBD</i>	Beach

RETREAT #1

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY

Washington Coast

TIME	[DATE]	LOCATION
8am	Breakfast & Opening Reflections	Roosevelt Room
9am	Story of Self w/ Guest Expert Trainer	Ballroom
11am	Network Mapping	Ballroom
12pm	Lunch & Closing Ceremony	Beach
1pm	Goodbye, for now!	

RETREAT #2

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

[YEAR] Retreat #2 AGENDA

[DATE] – [DATE] // [Location]

TIME	[DATE]	LOCATION
11:30am	Arrive at Hotel	[Hotel name]
12pm	Lunch & Welcome <i>Welcome to our 2nd Retreat!</i>	[Hotel name]
12:30pm	Story of Self Activity	[Hotel name]
1pm	CCD Refresh, Prototyping & Discovery Synthesis	[Hotel name]
2:10pm	Refined Prototype Design	[Hotel name]
3:00pm	Break & Room Check-In	[Hotel name]
3:10pm	Co-Design Session Prep	[Hotel name]
4:00pm	Guest Expert Training <i>[Details TBD]</i>	[Hotel name]
5:00pm	Free Time Before Social Hour <i>Carpool at 5:45pm</i>	Anywhere
6pm	Social Hour <i>Mingle and get to know MRC Summit attendees</i>	TBD
7pm	Group Dinner <i>Continued Discussion, Refinement and Reflection</i>	TBD
8:30pm	Close <i>Get rest for big day tomorrow!</i>	

RETREAT #2

SLA REATREAT AGENDA TEMPLATES**SURFRIDER LEADERSHIP ACADEMY**

Washington Coast

TIME	[DATE]	LOCATION
8am	Breakfast <i>w/ MRC Summit attendees</i>	TBD
9am	Observe MRC Summit Presentations <i>Full schedule available separately</i>	TBD
12pm	Lunch <i>Cohort leaves by 12:45pm to meet at Hotel</i>	TBD
1pm	Co-Design Prep Time	[Hotel name]
2pm	Quick Dry Run <i>Travel back to River Street Building at 3:00pm</i>	[Hotel name]
3:30pm	Surfrider Leadership Academy Project Co-Design Session	TBD
4:30pm	Adjourn; Cohort Debrief and Synthesize Feedback	TBD
5pm	Break & Personal Time <i>Carpool to dinner at 5:45pm</i>	Anywhere
6pm	Dinner followed by Social Event TBD	TBD
7:30pm	Optional: Informal Continued Discussion and Refinement <i>Or Personal Time</i>	[Hotel name]

RETREAT #2

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

TIME	[DATE]	LOCATION
7:30am	Pack Up & Room Check Out <i>Drop bags in cars</i>	[Hotel name]
8am	Breakfast	TBD
9am	Updating Your Community	[Hotel name]
9:30am	Prep Time for Update	[Hotel name]
10:30am	Break <i>Final deadline for check-out of rooms</i>	[Hotel name]
11:00am	Closing Thoughts <i>Leave for Summit at 11:30pm</i>	[Hotel name]
12:00pm	Lunch <i>Cohort mingles with MRC Summit; gets final input including feedback and ideas to incorporate into refined prototype for future; takes photo</i>	TBD
1pm	Surfrider Leadership Academy Refined Prototype Share Out	TBD
1:30pm	Final MRC Summit Presentations	TBD
2:30pm	Wrap Up and Adjourn	TBD

RETREAT #3

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

[YEAR] Retreat #3 AGENDA

[DATE] – [DATE] // [Location]

TIME	[DATE]	LOCATION
11am	Cohort arrival <i>Cohort memebers welcome to arrive, drop bags, and get settled in</i>	[Hotel name]
11:30am	Opening ceremony <i>Please be ready to get started at 11:30am</i>	TBD
12pm	Lunch	[Hotel name]
12:30pm	Welcome <i>Goals, roles, logistics and intentions</i>	[Hotel name]
1pm	[Guest Expert Training Session] <i>Details of session</i>	[Hotel name]
2:45pm	Time to Get Organized <i>Planning your collaboration as we coundtown to your mobilization pitch</i>	[Hotel name]
4pm	Meal Planning & Next Steps Huddle <i>Who, what, where, when then buffer time until dinner</i>	[Hotel name]
6pm	Dinner <i>Final dinner with just the cohort and facilitation team</i>	Location to be shared
7:30pm	Close <i>Big day tomorrow! Continue work as needed and get some rest</i>	Anywhere

RETREAT #3

SLA REATREAT AGENDA TEMPLATES**SURFRIDER LEADERSHIP ACADEMY**

Washington Coast

TIME	[DATE]	LOCATION
8am	Team Breakfast <i>[Breakfast details]</i>	TBD
9am	Cohort Work Time <i>Agenda TBD by Cohort</i>	[Hotel name]
12pm	Team Lunch <i>[Lunch details]</i>	[Hotel name]
1pm	Dry Run & Final Touches <i>Agenda TBD</i>	[Hotel name]
2pm	Free Time for Head Clearing	Anywhere
2:30pm	Grab a coffee!	Anywhere
3pm	SLA Mobilization Pitch <i>1 hour presentation to honored guests w/ 30 min of Q + A</i>	[Hotel name]
4:30pm	Wrap up and Adjourn	[Hotel name]
5pm	Social Hour <i>Open to advisory board, alumni and peers</i>	TBD
6pm	Dinner <i>Honored guests will mingle and dine with cohort to celebrate</i>	TBD
8pm	Close <i>Optional reflection in journals</i>	Anywhere

RETREAT #3

SLA REATREAT AGENDA TEMPLATES

SURFRIDER LEADERSHIP ACADEMY
Washington Coast

TIME	[DATE]	LOCATION
7:30am	Check out of hotel <i>Drop bags in cars or bring to meeting space</i>	[Hotel name]
8am	Check out of hotel <i>Informal breakfast and debrief with remaining guests</i>	TBD
9am	What Comes Next <i>Debrief and mapping the future of your group project</i>	[Hotel name]
10am	Reflection <i>Discussion and personal reflection time</i>	[Hotel name]
11am	Closing & Box Lunch <i>Box lunches to eat or take on the road</i> <i>Group photo</i>	[Hotel name]
11:30am	That’s all folks!	TBD

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