

**A UTILIZATION-FOCUSED EVALUATION OF THE NATURAL STEP,
SUSTAINABILITY FOR LEADERS – LEVEL ONE COURSE**

By

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ABSTRACT

The Natural Step (TNS) is a global non-profit organization, providing a science-based framework, methodology, tools, and training for sustainability to: leaders; change agents; and champions in organizations and communities. This thesis is a utilization-focused evaluation of a two-day course called *Sustainability for Leaders – Level One*, which was designed and delivered as a pilot over six sessions, in six sites, by TNS Canada in the Fall/Winter of 09/10 (course now ongoing). TNS Canada's intention is to scale use of TNS Framework upwards and outwards within Canada. Research included: evaluating course materials; observing pilot deliveries; interviewing course designers, facilitators, participants; and assessing participant feedback. The research uncovered many positives in the course, but also found areas for improvement. Feedback and specific recommendations are given about: course design, facilitation, course impacts, the integration and definition of leadership for future deliveries, and knowledge generated for the *Sustainability for Leaders – Level Two* course.

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INTRODUCTION

Background and Rationale

The Natural Step (TNS) is a global non-profit organization with a mission to promote real change toward a sustainable world. The TNS Framework provides a science-based sustainability definition, methodology, tools, and training for sustainability to leaders and change agents in organizations and communities. The organization began in Sweden in 1989 under the direction of Dr. Karl-Henrik Robèrt, and has helped thousands of organizations and communities move towards sustainability (TNSC, 2009a). Worldwide, there are autonomous TNS offices in eleven countries including Canada. TNS Canada's mission is "connect(ing) every leader in Canada with the inspiration and learning they need to make strategic choices for the long-term benefit of our environment, economy and society" (TNSC, 2007).

The intersection of my passion for sustainability with my personal work history laid the foundation for this study. Professionally, I am an organizational consultant, designing and delivering learning programs around leadership, team-building, emotional intelligence and idea generation for learning organizations across North America. Research by Molnar and Mulvihill (2003) suggests "to date, one of the most promising bridges connecting organizational learning and corporate sustainability activity has been The Natural Step" (p. 168). The research goes on to describe how "advocates of corporate sustainability and practitioners of organizational learning have launched collaborative ventures because they perceive an integral link between fostering fundamental change, engaging extensive collaborative activity and, in some cases, revisiting core assumptions about business and its purpose" (p. 168). I agree with this statement and see the theory of the learning organization being a key to pursuing sustainability within organizations, and in turn, society. Further, I believe that TNS is taking a visionary approach to fostering links

between organizational learning and sustainability. The links between my experience and the TNS approach were synergistic, creating a mutually beneficial relationship for this study.

In TNS Canada's *Theory of Change* (2009a) document, TNS stated its vision is "a sustainable world – one in which our communities, businesses and institutions thrive within our natural limits" (p. 1). TNS uses a scientific framework and baseline definition for sustainability to accomplish this goal. Within their framework, TNS has defined the Systems Conditions for a Sustainable Society according to four rigorous, scientific principles (see below and Appendix A):

In a sustainable society, nature is not subject to systematically increasing...

...concentrations of substances extracted from the Earth's crust,

...concentrations of substances produced by society,

...degradation by physical means,

and, in that society - people are not subject to conditions that systematically undermine their capacity to meet their needs. (TNSC, 2011c)

The principles provide constraints within which human society can operate in a sustainable way. TNS prides itself on the fact that the four principles create a frame within which we (as individuals and organizations) can be as innovative as we like in creating a sustainable society, as long as the system conditions are not violated. I believe that the tools and common language of TNS help organizations and communities work within the TNS framework to develop their own picture of sustainability and a plan to move towards a sustainable future.

TNS is an organization creating positive change towards sustainability in the world. The organization is evolving and is constantly available to constructive input. For example TNS Canada executive director describes "learning days" that TNS holds quarterly, where:

We spend (time) talking about what went well, where we can do better, what the clients are saying, any ideas about new things we could be doing or improvements to our methodology, and then we make sure we are sharing that with the group and address any problems (and)... opportunities and then we make sure we build that into our plans.

(personal communication, January 15, 2010)

This thesis is an opportunity for me to contribute, in a small way, to positive change for TNS in the areas of pedagogy, idea generation, and information dissemination. TNS principles, framework and ideas are well established, so the next steps for the organization include attention to continuous improvement in teaching and enabling use of the TNS approach to sustainability, which I hope this thesis will inform and support.

Statement of Research Problem

This thesis describes a utilization-focused evaluation of a new training course called *Sustainability for Leaders – Level One* (SFL1), which was designed by TNS Canada. The course was designed for existing and emerging sustainability consultants, practitioners, and champions within organizations or communities. A bigger picture purpose of the course, as stated by a TNS advisor and SFL1 course facilitator, is to scale up and out the utilization of the TNS Framework within Canada. In the fall/winter of 09/10, the two-day course was introduced and delivered by TNS Canada on six different occasions, in cities across the country. The specific course objectives are to provide participants with grounding in understanding and use of the TNS Framework and methodology, while revealing insights into creating organizational buy-in for action towards sustainability. This course is a new project for TNS, and is intended as a pilot for future deliveries of SFL1, and as a step on a learning path towards a more extensive, and application based Level Two version.

For this evaluation I: 1) assessed all course materials; 2) attended and observed three of the six course deliveries in person (Calgary, Vancouver and Halifax); 3) interviewed the course designers and facilitators; 4) interviewed course participants from four of the six deliveries (Calgary, Vancouver, Ottawa and Halifax); 5) e-mail surveyed participants for follow-up data, months after the course deliveries; and 6) assessed written participant feedback collected by TNS. There were two overarching objectives to this research:

First, to contribute to the continual improvement of future deliveries of SFL1 by evaluating the course based on the opinions of participants and facilitators, my own observations, and current best practices in the fields of adult education and leadership training. I am providing specific feedback and making recommendations to TNS around: key elements of course design and improvement areas, facilitation/facilitators, the impacts of the course on participants, and the leadership element of the course.

Second, to solicit, compile and report on knowledge generated through the opinions of participants and facilitators, and my own observations, about the design and content of the TNS *Sustainability for Leaders – Level Two* (SFL2) course (currently under design).

Research Questions and Data Collection

The first objective of this research is to provide feedback and recommendations, based on the SFL1 pilot to facilitate improvements of future deliveries of SFL1. To achieve that objective I aimed to answer the following questions:

- 1a. What are the key elements of the SFL1 course design? What worked well in each of those elements? What could be improved in the course?
- 1b. How did the facilitation of SFL1 go (from the participant, facilitator and observer perspectives)? What worked well? What could be improved?

1c. What impacts did SFL1 have on participants? Questions to participants to determine impact related to: their biggest highlights/takeaways, the stories they tell, their satisfaction with the course, and their use of the TNS Framework.

A topic/question that emerged from the research was:

1d. The course is called Sustainability for Leaders – is the leadership element addressed properly? How could the leadership element in the course be improved?

The second objective of this research is to solicit, compile and report on knowledge generated about the design and content of SFL2. To achieve that objective I aimed to answer the following question:

2. What are some recommendations for the development of the SFL2 course, based on SFL1 participant and facilitator feedback, my own ideas, and best practices in adult education?

In preparing research questions for this thesis, I followed Michael Quinn Patton's Utilization-Focused Evaluation process (1997), which "begins with the premise that evaluations should be judged by their utility" and states, "the focus in utilization-focused evaluation is on intended use by intended users" (p. 20). In this context the primary users of the evaluation are representatives of TNS with responsibility for the future of the SFL courses. The objectives of TNS representatives and subsequent research questions were determined through my dialogue with one of the course designers (Pong Leung); some of the course facilitators (Pong Leung, Sarah Brooks, John Purkis, and Mike Purcell); Kelly Hawke Baxter (TNS Canada Executive Director); and Dwayne Hodgson (TNS Canada Manager of Sustainability Learning Programs). Patton (1997) suggests that "evaluation findings can serve three primary purposes: rendering

judgments, facilitating improvements and/or generating knowledge” (p. 65). Each of these purposes is served by different parts of this evaluation and their related questions.

Study Limitations and Delimitations

There were several primary limitations of this study: my physical attendance and presence at SFL1 courses, the number of stakeholders from whom I was able to garner information, and specific limitations based on the stakeholders I engaged with. This study looked at the first six deliveries of SFL1 across Canada, which were deemed the ‘pilot’ group of deliveries. However, I was only able to attend three of the six deliveries (Calgary, Vancouver and Halifax), which means I missed certain styles of delivery by facilitators whom I did not observe (in Toronto, Ottawa and Montreal). There were a total of 106 participants in the first six deliveries of SFL. I was able to obtain information in the form of an interview and/or e-mail questionnaire from a total of 24 of those participants. SFL1 was facilitated in teams of two by TNS advisors. Of the six advisors who facilitated the six pilot deliveries of SFL1, I was able to observe and interview five of them at some point in the process. Limitations of the respondents themselves included the fact that individuals who were willing to volunteer to give feedback may have been a certain type of participant (i.e. the type that is willing to give more time to TNS, and in turn could be seen as having more of an affinity for TNS, which could affect their answers to questions). Limitations in terms of the facilitators include the fact that there was one with whom I did not speak or observe, and a total of three deliveries of the course which I did not observe. A further limitation (for both participant and facilitator interviewees) was the fact that I did not have them re-read and vet their interview transcripts. This was a conscious choice based on honouring people’s time and not wanting to burden them with further requests. While this does

impose a minor limitation, the use of tape recorder and word-for-word transcription should reduce the impact of this limitation.

An important delimitation to this study relates to the scope of potential areas of investigation within the SFL course, and the level of detail reported back to TNS. Specifically, looking at the key elements of SFL1 in answering research question 1.a, I chose twelve elements or themes to report back on, which I deemed most relevant, based on my observations and the nature of participant responses to interview questions. For example, there were many comments around improving the teaching of a part of TNS Framework called ‘The Funnel’, thus ‘Improving the Funnel’ became a theme of the feedback. There were more than twelve specific key elements of the course which could have been evaluated in depth, but time and space did not allow for it.

Another delimitation I put in place was ending the research after the first six deliveries of SFL1, which occurred in late 2009 and early 2010. The course was deemed successful by TNS and subsequent deliveries occurred later in 2010 and continue in 2011. While I have been in touch with TNS, and provided information and ideas along the way, the research for this thesis was restricted to the first six deliveries.

Need/Significance

In a discussion with course designers Pong Leung and Heather Worosz early on in this process, it was revealed that there was no formal plan for evaluation of SFL1 beyond a one-page evaluation filled in by participants at the end of the second day, and the lessons learned that were shared between the facilitators during the process. TNS is a non-profit organization with budget challenges to face as they “strive to inspire, educate, and connect Canadian leaders to accelerate the transformation toward a sustainable world” (TNSC, 2011a). Therefore the need and

significance of this study is that TNS received support in becoming even better at inspiring, educating and connecting Canadian leaders through the feedback provided in this evaluation. This being a utilization-focused evaluation, I identified the primary users of the evaluation (TNS) and focused on “their information needs... their intended uses” (Patton, 1997, p. 42). The data gathered and recommendations made in this thesis were specifically for TNS and designed to improve future deliveries of SFL1 and report on knowledge generated for SFL2.

The findings from this study could be used by TNS to inform decisions on other learning programs, as the data gathered came from individuals in their target market.

Researcher’s Perspective

I had both primary and secondary personal goals for this research. Through my evaluation of TNS SFL1, my primary personal goal was to produce a utilization-focused report for TNS which will be used to help meet their objectives, including: improving future deliveries of SFL1; contributing to increased use of the TNS Framework by Canadian sustainability practitioners; and reporting on ideas generated for the TNS SFL2 course. My hope is that this evaluation will be used. This report is far from the last word on SFL1, rather it is one of many steps in the evolution of the course and the creation of its successors. My secondary personal goal was to increase my knowledge and understanding of the TNS Framework, training and application. Through each step of my research and evaluation I have sought opportunities to continue my development, blending my passion for sustainability and learning with the TNS Framework and organization. My bias lies in the fact that I am an acknowledged proponent of TNS and the TNS Framework. It is therefore less likely that I would find fault in something TNS is doing as I completed this evaluation. Completion of this evaluation has me proposing many

design changes to the delivery and contents of TNS SFL1, but no foundational changes to the TNS approach or purpose, reflecting my stated bias.

LITERATURE REVIEW

The literature review for this thesis falls into four main areas. First, I present a brief review of the specific evaluation theories applied in this study; second, a discussion of adult learning theory, and related best practices in program planning and teaching; third, a look at TNS itself, its values and processes, extending into an exploration of the concept of a learning organization; and finally, a glimpse at the views of TNS on leadership, in the context of organizational and societal change towards sustainability.

Evaluation theory began the investigation, and was used to guide the goals and focus of the research. Choosing a utilization-focused evaluation came from my own desire to have the results of the research be of real use to TNS. The use of developmental evaluation (Gamble, 2006) emerged from the utilization focus, when TNS Canada's executive director described its use in TNS processes while I was investigating what TNS wanted out of this process. Adult learning was a natural area to research as SFL1 is a course exclusively for adults. Researching TNS processes and values offered further opportunity to focus on the end users of this evaluation, by understanding where TNS was coming from, and to match my recommendations with what TNS was doing as an organization. Finally, when questions arose about the leadership element of the course (called Sustainability for Leaders), it was important to understand the perspective of TNS on this multi-faceted topic.

Evaluation theories

This study is a utilization-focused evaluation, which means the evaluation was conducted with the intended users (representatives of TNS) in mind. Patton (1997) principally informed the research process. The utilization-focused evaluation concept "begins with the premise that evaluations should be judged by their utility and actual use" and "the evaluator facilitates

judgment and decision making by intended users rather than acting as a distant, independent judge” (p. 20). Patton goes on to explain, “Utilization-focused evaluation does not advocate any particular evaluation content, model, method, theory or even use. Rather it is a process for helping primary intended users select the most appropriate content, model, methods, theory and uses for their particular situation” (p. 22). Patton’s description of utilization-focused evaluation also focuses on the necessity for the evaluator to make choices, as

it is never possible to look at everything in great depth. Decisions have to be made about what’s worth looking at. Choosing to look at one area in depth is also a decision to not to look at something else in depth... the criterion for making those choices of focus (is) the utility of the resulting information. (p. 190)

Making choices of focus within the myriad interview data and materials for SFL1 meant that decision criteria had to exist. With Patton’s concept as a guide, I consulted with representatives of TNS to inform the studies’ objectives, research questions, themes and foci; including using the idea of developmental evaluation as a framework for this study, which led to my delivery of ongoing rather than summative feedback to TNS during this process.

TNS executive director recommended developmental evaluation to me through a document named *A Developmental Evaluation Primer (2006)*, produced by the McConnell Foundation, which gives an overview of this evolving field. The primer was used by TNS to help guide their internal evaluations. This endorsement matches Gamble’s (2006) suggestion that developmental evaluation is best suited to organizations like TNS, in which “the organization has a culture suited to exploration and enquiry” (p. 19). The six deliveries of the SFL1 course under observation in this thesis were described by one of the course designers as a pilot project, and a way to see what works (P. Leung, personal communication, October 1, 2009). The fact that the

deliveries being evaluated were a pilot and the fact that SFL1 was a building block for SFL2, which was under design, made it an ideal candidate for the developmental evaluation approach, with a goal of improving the course as it evolves.

Developmental evaluation is a term, introduced by Patton (1997), which refers to evaluation processes undertaken for the purpose of supporting program, project, staff and/or organizational development. The evaluator is part of a team whose members collaborate to conceptualize, design, and test new approaches in a long-term, ongoing process of continuous improvement, adaptation and intentional change (p. 105). The approach necessitates a particular attitude and mindset.

Gamble (2006) suggests “evaluators must balance being both sufficiently close and independent (to other stakeholders)... flexible and not overly attached to specific evaluation approaches” (p. 37). The challenge of “rolling with the punches” seems inherent in taking this approach. Elsewhere he describes the philosophy of developmental evaluation as an “intention to innovate” (p. 11), which creates an opening for immediate and ongoing feedback.

Improvement-oriented evaluations are described by Patton (1997) to include formative evaluation. He states “formative evaluation typically connotes collecting data for a specific period of time, usually during the start-up or pilot phase of a project” (p. 69). He notes that in addition to formative evaluation, improving programs can include identifying strengths and weaknesses, continuous improvement, and being a learning organization (p. 76). I considered using this approach, as descriptions such as above match well with the pilot aspect of SFL1, but I chose to concentrate on utilization-focused and developmental evaluation theories because they seemed to best match my desire to assist TNS.

After reviewing potentially appropriate evaluation theories I began with a utilization-focus, because it seemed to best match my desire to contribute to practical improvements to SFL1 for TNS, and learn to work the way they work. Additionally using the open, collaborative style of developmental style of evaluation preferred by TNS was a natural product of the utilization-focus on TNS.

Adult Learning Theory

In evaluating and seeking to improve TNS SFL1, I considered theories of adult education and best practices in program planning and teaching. Merriam, Caffarella, and Baumgartner (2007) bring the ideas of many adult education theorists together, including Knowles' (1980) concept of andragogy, which refers to the art and science of helping adults learn. Knowles advances ideas about adult learning including: "there is a change in time perspective as people mature – from future application of knowledge to immediacy of application; the most potent motivations are internal rather than external; and, adults need to know why they need to learn something" (Merriam et al., 2007, p. 84). This type of learning, with a focus on personal engagement and practical application, is described by TNS founder Karl-Henrik Robèrt in his book *The Natural Step Story* (2002), when he says "TNS is built on personal engagement and responsibility. People learn not to support the process but to actually run it" (Robèrt, 2002, p. 131). The 1991 North American Association for Environmental Education workshop summary on Action Models in Adult Environmental Education (Andrews, Camozzi, & Punttenney, 1991) provides an extensive list of factors against which we can benchmark SFL1. Some of their main factors listed as critical to adult learning are in line with Robèrt's ideas and include: participants must own what is being taught; participants need a personal stake in the program; the program should have follow-up; the program should have an opportunity for hands-

on/participation/practice; learning must be relevant to participants' lives; and participants should feel the material is usable.

In describing adult learning through narratives and stories, Merriam et al. (2007) also cite the work of other experts in this field. For example, they describe the work of Jonassen and Hernandez-Serrano (2002) around past stories in the form of case studies helping guide future action of students. These authors state “stories can function as a substitute for direct experience, which novice problem solvers do not possess. Supporting learning with stories can help students to gain experience vicariously” (Merriam et al., 2007 p. 210). Stories are central to the way TNS is taught, both in case studies in SFL1 and also through other forms of communication and teaching. In his introduction, Robèrt (2002) writes:

There are things to be learned, not only from the intellectual achievements of TNS but also from the breakthroughs and mistakes of the organization. Therefore, this book will be presented as a story. It is my wish to make the story so entertaining, trustworthy and relevant that it may recruit more people into the dialog on how to apply systems thinking for strategic planning toward a socially and ecologically sustainable world. (p. 3)

Key principles in educating adults are also represented in Caffarella's book *Planning Programs for Adult Learners* (2002), which draws from extensive adult learning sources and describes principles for adult learning that include: adults learn best if their rich background of knowledge and experience is acknowledged and built upon; adults are pragmatic in their learning and want application; the way adults learn is affected by the roles they play in life; adults come to learning situations with their own personal goals and objectives (p. 29). Caffarella's principles inform her Interactive Model of Program Planning. The model is non-linear, involves many stakeholders, and has a checklist that makes the model a practical tool. The twelve categories of

the model, which include ideas on identifying program ideas, building a solid base of support, making recommendations and communicating results, and coordinating facilities and on-site events, each contain detailed suggestions for action in program planning. Caffarella's model fits well with developmental evaluation, because in this model program designers, sponsors, participants, and evaluators all co-operate to produce the best possible program. A relevant example of Caffarella's principles is in identifying program ideas. She states "because adults are more willing to engage in learning activities when the content is meaningful to them, collecting ideas for programs from participants enrolled in current educational programs is a good way to generate ideas for future programs" (p 29).

The Natural Step: values and processes

In performing this utilization-focused evaluation of SFL1 for TNS (who is both a subject and end user of the evaluation), it was important to look into TNS itself: the organization's values and processes, and the theory of the learning organization.

As mentioned in the introduction, Dr. Karl-Henrik Robèrt founded TNS in Sweden in 1989. From its beginnings as a collaborative project among dozens of scientists, and through its work with communities, businesses and other organizations, TNS is all about creating a conversation and engaging stakeholders in creating the next step, versus being prescriptive about exactly what should be done to effect change (Altomare & Natrass, 1999; James & Lahti, 2004; Robèrt, 2002). TNS Systems Conditions for a Sustainable Society were created through a collaboration of scientists according to four rigorous, scientific principles (see Appendix A), and form the baseline or underpinnings of TNS. Robèrt lays out the core values of TNS, which include:

- All TNS work is based in science

- TNS is an organization which believes in transparency between all of its stakeholders
- TNS strives to be a learning organization
- TNS aims to ‘walk the talk’ with its own high environmental standards
- TNS is committed to continuous learning as an organization and in its work with others. (2002, p. 237)

TNS is also guided by processes, which inform everything that they do. TNS processes include:

- TNS Framework, which guides strategic planning through tools like backcasting and a process called ABCD.
- Simplicity without reduction, which is a way to explain systems, based on the systems conditions for a sustainable society, shining a light on ‘upstream causes’.
- Consensus, meaning TNS aims to engage as many brains as possible in tackling sustainability challenges.
- Best practice, which means that TNS materials are designed to support other sustainability tools, rather than be adversarial
- Autonomous learning, in that TNS wants individuals to internalize the general principles of TNS Framework, and then independently apply it to their own particular situation.
- Partnerships and co-operation, implying TNS believes that more can be achieved if people and organizations are working together, rather than in isolation or through confrontation.
- Continuous learning, which means TNS relies on all stakeholders to seek continuous improvement, which requires:

- Systemically updating TNS teaching materials
- Constantly developing new tools for specific purposes
- Sharing tools, experiences, successes, failures and problems
- Listening and always being open (p. 237-239)

Because this evaluation was utilization-focused, some of the guiding processes that TNS use including tools like backcasting, principles of dialogue, transparency and open communication, education and training, and the theory of the learning organization, were factors in guiding my overall direction and processes for this thesis. When interacting with TNS, I strove to communicate as if I was one of their own, guided by everything I had read and learned about them through this process.

A specific example of a TNS process tool from within the TNS Framework is the concept of ‘backcasting’. Backcasting is essentially beginning with the end in mind. When using this tool, an organization or community imagines a truly sustainable future (based on the four systems conditions for a sustainable society), and then plans out their action steps in reverse, culminating with the next step an organization or community should take to move towards that imagined sustainable future. TNS Canada (2009b) states: “at the individual level, most of us backcast automatically, but when we plan for the future in larger groups, such as communities, municipalities or businesses, we tend to use forecasting instead” (p. vii). In planning for sustainability, forecasting may mean looking to the past to establish a future trend or using a short-term solution to get rid of a problem today, without addressing the systemic and long-term nature of the issue. When backcasting based on the four systems conditions, there is a principle-based definition of future success to work towards. This means an organization knows that its next move towards a desired goal will be as efficient as possible (TNSC, 2009b). Creating this

type of understanding allows individuals and organizations to make decisions in the context of cause and effect in relation to sustainability.

Literature about strategic life-cycle management (Broman, MacDonald, Ny, Robèrt, and Yamamoto, 2006), sustainability-focused organizational learning (Molnar and Mulvihill, 2003) and seeing the myriad sustainability tools in existence through a systems lens (Aloisi de Lardere et al., 2002), all refer to TNS processes as being a valuable guide to more specific sustainability initiatives. For example Broman et al. describe the improvements to life cycle assessment borne by the use of a Framework like TNS, ranging from providing a structure for operating, to a set of questions that ensure the full context of sustainability including the strategic business/economic dimension are taken into account (p. 72). The research of Molnar and Mulvihill (2003) goes into their findings about leaders in corporate sustainability. As they put it, ‘true leaders’ in corporate sustainability used “the TNS four systems conditions as a compass for sustainability... and therefore accept(ed) that (they) had to be publicly accountable” (p. 171). In spite of the divergent perspectives from which these authors approach TNS, they agree that it is an established and legitimate baseline in the world of organizational sustainability.

Learning Organization

In his book *The Fifth Discipline* (1990), Senge introduced and defined the term learning organization as “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (p. 3). Senge’s definition is somewhat lofty and idyllic, but the learning organization concept can be simplified and easily understood. In her book *Creating a Learning Organization* (1995), Brahm stated simply “a learning organization is an organization that prioritizes learning” (p. 4).

In describing the tools that are important for creating a learning organization, Braham (1995) refers to Senge's point that "becoming a learning organization is not about emulating a model. Rather, you create the learning environment as you go, based on your organization, its customers, problems, markets and individual personalities" (p. 17). The research of Molnar and Mulvihill (2003) describes the concept of a learning organization as still evolving, but points out common practices which include: an explicit commitment to being a learning organization; fostering a sense of community and interconnectedness within the organization, a focus on communication through meaningful dialogue and creating the capacity to embrace change and to be flexible, resilient and inventive. In their book *Sculpting the Learning Organization*, Marsick and Watkins (1993) put it more simply by discussing organizational learning as a form of planned organizational change. "The goal of organizational learning is an increase in the organization's overall capacity to make changes. Successful learning organizations create systems that build the overall capacity of the organization to grow and learn continuously" (p. 270).

A learning organization, then, is one that is open, is seeking improvement, is always reacting to what is happening now, and is able to do these things because it proclaims itself to be this way, and demonstrates that proclamation. TNS advisors and board members describe TNS as a learning organization. Based on my work with TNS and the above definitions of a learning organization, TNS seems to be living these principles as they are defined. TNS demonstrates learning organization traits through: their use of informal 'lessons-learned' sessions during SFL1 deliveries; their general use of developmental evaluation theory; and the fact that TNS representatives are part of the team creating ongoing options for change through recurring TNS

‘learning days’ where staff are able to openly discuss current programs and initiatives, and ways to improve them.

Relevant TNS-related ideas on leadership

Leadership can be defined in countless ways, but the definition relevant to this study is how TNS defines it. TNS Canada’s mission statement has a focus on leadership in terms of action:

Our mission is to connect every leader* in Canada with the inspiration and learning they need to make strategic choices for the long-term benefit of our environment, economy and society.

*A leader is anyone with passion, a purpose and a genuine commitment to making things happen. (TNSC, 2007, p i)

There is a quote from Robèrt which appears in myriad TNS documents and materials, including annual reports, sustainability primers, and course materials for SFL1 in which he states “the question of reaching sustainability is not about if we will have enough energy, enough food or other tangible resources... The question is: will there be enough leaders in time?” (TNSC, 2009c, p. 17). Robèrt speaks of the type of action-oriented leader referenced in TNS Canada’s mission statement. His quote also refers to leadership in the way he describes it in *The Natural Step Story* (2002), in the final chapter entitled The Hidden Leadership. He explains the leaders we need are ‘hidden’ in terms of the paradigm from which they are working, the old paradigm being the way things have always been done, whereas ‘hidden’ leadership comes from a true understanding that our population and its lifestyle has grown beyond planet Earth’s carrying capacity and “there is nowhere left to go” (p. 196). Robèrt sees the role of leaders as understanding and believing in visions of a sustainable future for humans on Earth, and then

engaging others “because it is their job to see and interpret and communicate visions, and to be stubbornly persistent in doing so.” (p. 201). So to TNS, leaders are action-oriented communicators, armed with the tools and commitment to make something happen. It is the mission of TNS to prepare ‘hidden’ leaders and make them “visible, to speed up the process of making the new paradigm – ‘the taking care of the planet culture’ – the norm” (p. 204).

The type of leadership that Robèrt and TNS describe, which is more about understanding, relationships, action, and meaningful work; rather than hierarchical position, is echoed in other current literature on leadership. In *The Leadership Pipeline*, Charan, Drotter and Noel (2011) state that one of the three key achievements necessary when one becomes a leader is “building social contracts through establishing relationships with direct reports, bosses, and support groups that facilitate open dialogues and trust” (p. 41). In *Positive Leadership*, Cameron (2008) looks at factors that produce results, and finds that leaders who “Reinforc(e) the benefits (of the work) produced for others... identify the long term impact of the work, and emphasize contribution goals... all foster a sense of meaningfulness and, as a result, higher levels of performance (p. 79). TNS goal is to produce leaders who are comfortable creating relationships to foster pro-environmental behaviour at any level of an organizational chart, and who have a meaningful and relevant platform from which to work. Higher levels of performance through intrinsic satisfaction, combined with TNS Framework that encourages engagement in a non-traditional hierarchical sense, helps create opportunities for leaders emerging from TNS training to create significant positive change.

Also relevant to TNS views of leadership is the work of TNS Board Director and sustainability author Bob Willard who writes, in his book, *The Sustainability Champion’s Guidebook*, “there are hundreds of books on how to lead change successfully... this... describes

seven practices that are most relevant to sustainability champions” (2009, p 36). His Seven Leadership Practices for Sustainability Change are to: 1) get credible, stay credible; 2) dialogue; 3) collaborate, educate, network; 4) meet them where they are; 5) piggyback existing initiatives; 6) influence the influencers; 7) practice ‘planful opportunism’. Willard’s book goes on to describe many aspects of moving towards sustainability in organizations but his descriptions of the Seven Leadership Practices and the practical action ideas contained within them are particularly relevant to the SFL1 course. More specifically, the practices of credibility; collaborate, educate, network; and influence the influencers tie into exactly what TNS is trying to teach course participants to do once they return to their organizations. Some of Willard’s points are tied directly to the discussion and recommendations later in this thesis.

Conclusion

The values and processes that TNS aspire to as a learning organization, such as continuous improvement and openness to change, are well supported by utilization-focused and developmental evaluation theories, hence my selection of these methodologies for this study. TNS Canada has a strong culture of learning and is a practicing learning organization.

Key principles in adult learning around applicability and relevance described in the literature are a match with the mission of TNS to prepare Canadian leaders to use the TNS Framework, and are important to the evaluation of SFL1. The applied nature of SFL1 suggests it will be successful in connecting with its adult participants. The storytelling/case study aspect of TNS also correlates with narrative learning style described in the literature.

Leadership is a key tenet of TNS philosophy and practice, and therefore its development is a critical element in the success of SFL1 and other TNS courses, therefore the elements that support and enable leadership development also form part of this evaluation. While extensive

literature exists on the broad topic of leadership, it is clear that TNS interpretation of leadership, and related, supportive literature for sustainability leaders are relevant here. As a result, this topic became one of the foci of the literature review.

RESEARCH METHODOLOGY

Research Design and Rationale

The methodology for this utilization-focused evaluation of TNS SFL1 was conducted with the intended users (representatives from TNS) in mind. The utilization-focus led to the additional investigation into and use of developmental evaluation. This is because developmental evaluation is the preferred method of TNS. I used both methods to provide feedback and make recommendations about course design, facilitation, impacts of the course, and leadership, for future deliveries of SFL1; and to generate knowledge for the development of SFL2.

To collect data for all research objectives and questions I: 1) assessed course materials (introductory package, online pre-course training, workbook, visual aides and follow-up materials); 2) attended and observed three deliveries of the course; 3) interviewed course designers and facilitators; 4) interviewed participants following course deliveries, and a few months after course deliveries; 5) e-mailed participants a brief questionnaire for follow-up data a few months after the course deliveries; 6) assessed participant feedback submitted in the TNS-administered one page post-course feedback form; 7) reviewed literature relevant to the study; 8) kept personal journal notes and reflections during the entire process; and 9) provided ongoing feedback to TNS. The methods and approaches I used are described below, followed by descriptions of their direct application and details of data collection for this study.

Utilization-focused evaluation approach

Patton (2007) describes the primary role division that occurs in utilization-focused evaluations between academic and service orientations. He explains the difference:

Academic evaluators tend to be at universities and emphasize the research purposes of evaluation, traditional standards of methodological rigor, summative outcome studies and

contributions to social science theory. *Service evaluators* tend to be independent consultants or internal evaluators and emphasize serving stakeholders' needs, program improvement, qualitative methods and assisting with program decisions. (p. 122)

I am certainly the latter, and my specific actions as a service oriented utilization-focused evaluator included the following:

- Passing on specific verbal and written feedback and suggestions to facilitators before and during SFL1 deliveries in the Fall/Winter of 2009/10
- Verbal feedback to facilitators during post-course facilitator interviews (six different occasions) in the Fall/Winter of 2009/10
- Preparing and delivering verbal and written reports containing higher-level SFL1 feedback to TNS Canada Executive Director in January 2010 for her use in the January TNS 'Learning Day'
- Discussions with the Manager of TNS Learning Programs in March 2010 about early findings, the leadership element of the course, and the challenges of developing an SFL2 curriculum that would work for the various stakeholders
- Sending the early drafts of my sections on Leadership in SFL1 and ideas around recommendations for SFL2 to the manager of TNS Learning Programs in July of 2010
- Sending drafts of compiled course and interview data to the new Manager of Learning Programs and TNS Exchange and discussing findings and big picture recommendations for the course with her in March of 2011
- Sending this thesis both in part and whole to various TNS representatives, upon its completion, with an offer to discuss the research and results with anyone interested

Developmental evaluation approach

Developmental evaluation is an approach that is sponsored and encouraged by TNS in their own internal evaluations, so as a utilization-focused evaluator, it made sense to work with an approach already being used by the organization. “What developmental evaluation does is combine the rigour of evaluation, being evidence based and objective, with the role of organizational development coaching, which is change oriented and relational” (Gamble, 2006, p. 18). My role in evaluating this course was to design and ask questions of all stakeholders while sharing information in such a way that allowed for continuous improvement of the evolving design of the course, ongoing attention to its future deliveries, and generation of knowledge for dialogue about SFL2. During the program deliveries I attended, I took my own notes to capture a record of the flow of each session as it unfolded, so individual elements of the entire course could be referenced and investigated. I also took notes on how particular exercises or pieces of the course were going, along with the overall feel in the moment. Further, I considered which activities and strategies helped the participants reach the goals of the course through my observations in the moment and specific questions during the interviews.

My experience as a facilitator in organizational learning settings, and the nature of my observing three distinct deliveries of the same course, were a natural link to the developmental evaluation approach. My background and the developmental evaluation philosophy lead me to not simply observe, gather, and “save” information and suggestions until the end of all six deliveries, but to also selectively offer suggestions and assistance to facilitators during my evaluation time to improve the current or next session

Data Collection

To start, I reviewed the existing course materials including the workbook and PowerPoint slides. I interviewed designers and facilitators, inquiring into the goals of the course and the details of the course materials. I evaluated the pre-SLF1 online training course by taking the course myself and asking participants questions about it during the interviews. In addition, I assessed and evaluated the course welcome package and follow-up materials by reading everything sent to participants by course facilitators before and after the course. To complete this portion of the evaluation, I inquired into participant opinions of all course materials during post-course interviews.

All interviews were conducted either in person, or by phone. The interviews were recorded in MP3 format with a USB microphone onto my laptop computer using Amadeus Pro software, and were later transcribed.

Participant Data: Post Course One-On-One Interviews

I developed interview questions based on consultation with TNS representatives about the information that interested them, themes I extracted from observing the first (Calgary) course delivery, best practices derived from Caffarella (2002), consultation with my thesis supervisor, and from input provided by Dwayne Hodgson, TNS Manager of Learning Programs, who reviewed the final drafts of the questions.

There were six deliveries of the course in this pilot program. Logistical and scheduling issues did not allow me to interview participants for facilitators from two deliveries (Toronto and Montreal), though I was able to obtain the official TNS one-page participant feedback forms from those courses. I conducted post-course interviews with groups of two to seven participants within ten days following each delivery of SFL1 I attended (Calgary, Vancouver, Halifax), and

after one of the deliveries (Ottawa), which I did not attend. In total I performed 17 post-course interviews. Interviews lasted between 20 and 75 minutes, with the average being about 45 minutes. In discussions with TNS representatives in advance of this study, their requested goal was to interview four participants per course. With my focus on four of the six pilot deliveries I was able to meet this objective. To recruit participants for the study, I gave a short description of my study at the beginning of each course I attended, and then passed around a sheet asking for volunteers during the course. In the case of the Ottawa delivery, I had a TNS representative send an email to participants describing my study and asking for volunteers.

Discussing the experience of the course itself with participants immediately following the delivery enabled their gut reactions and more immediate, preliminary opinions to be expressed. Interview questions focused on participant experience, their thoughts on course design and facilitation, the topic of leadership, and their ideas or desires for SFL2 (see Appendix B for the interview guide).

I also performed post-course interviews with some of the course facilitators. There were a total of six facilitator interviews with four facilitators. The same TNS advisors facilitated the Calgary and Vancouver courses, but I interviewed them after each course. The other two TNS advisors I interviewed facilitated the Halifax delivery. The facilitator interviews focused on what they thought went well in the session and what could be improved or changed (including their own performance), their thoughts on leadership, and their ideas for SFL2. Facilitator interviews lasted between 30 and 75 minutes, with the average being about 45 minutes. The interview guide can be found in Appendix C.

Participant Data: Follow Up E-Mail Surveys and One-On-One Interviews

Between three and four months after the deliveries of SFL1 I sent brief (three question) surveys by email to 43 participants (who had stated they were willing to receive email questions from me) from the three course deliveries I attended. I asked for feedback on: the story they tell people about SFL1 and TNS; their use of the TNS Framework; and if they obtained what they wanted out of the course. I received 11 e-mail responses to this survey (a 26% response rate). A typically good response rate, exceeding the level required for data validity is 30% (Cohen and Manion, 2007). The questions can be found in Appendix D.

I also conducted a total of five follow-up interviews three months after course delivery. The interviews included questions about the impact of SFL1 on participants by asking about: the story they tell people about SFL1 and TNS in general; what stood out the most for them; and their use of the TNS Framework in their work. There were also questions about: follow-up and support from TNS; networking; and thoughts on future learning with TNS. The interview guide can be found in Appendix E.

Participant Data: Other TNS Interviews

In addition to the participant and facilitator interviews, I interviewed and had discussions with other TNS representatives and executives. I asked questions about: the direction of this research and about some of my higher level findings and ideas related to SFL1; the type of information TNS was interested in, and about SFL1 and SFL2 in general; the leadership aspect of TNS USA SFL1 training, and TNS USA's method of follow-up and evaluation for their version of the course. I engaged these representatives and executives in order to gain their perspective on my work, and to pique their interest in the results of my research. I felt this type

of engagement would make it more likely that my results would be read and potentially used in the future by TNS.

Data Analysis

For data from interviews, I collected and read the transcribed participant answers to all interview questions, and organized them as summaries for individual questions. Once organized, I re-read the answers and highlighted key quotes while organizing the data under the thesis research questions. During this process, themes emerged, which I developed into the 12 key elements of SFL1 described in research question 1a. The themes were chosen through a combination of the frequency certain topics were mentioned by respondents, the depth of specific responses, and the types of data TNS had stated they were interested in receiving. Data to inform research question 1b, which related to facilitators and the course facilitation, came from both direct questions to participants and facilitators within the interviews, and from answers to other interview questions that touched on facilitation or facilitators. The impacts of the course, which are investigated in research question 1c, were gleaned from answers to the interview questions that were general rather than specific (e.g. what was the best part of day one?). Research question 1d about the leadership aspect of SFL1, emerged from an early interview where a participant stated directly that they were confused about the title of the course and the lack of overt leadership focus. In subsequent interviews, I asked questions related to the leadership aspect of the course and uncovered strong opinions on the subject. The data for research question 2 was taken directly from interview questions about what should be included in SFL2. I made an effort to run all interviews in the same way (using the interview guides), but the nature of the conversations meant that not all questions were asked to or answered by all subjects summary data from the interview questions are grouped below under the research questions they pertain to.

Once the themes and final research questions emerged from the data I returned to my own notes from the course deliveries I attended and looked for correlations. I was able to build on and confirm participant data with my notes. The relevant ideas from my observations became key elements of my recommendations to TNS.

RESULTS, DISCUSSION AND RECOMMENDATIONS

Summary of the study

This study was a utilization-focused evaluation of a two-day course called Sustainability for Leaders – Level One, which was designed and delivered as a pilot by The Natural Step (TNS) Canada in the Fall/Winter of 09/10. This evaluation is written for TNS, and at their request provides feedback and makes recommendations about: course design, facilitation, impacts of the course, leadership, future deliveries, and knowledge generated for the *Sustainability for Leaders – Level Two* course.

The results, discussion and recommendations presented here are: data consolidated from interviews and e-mail questions from participants and facilitators following SFL1; and my own ideas generated through observing course deliveries and the interview process. The results, discussion and recommendations are organized under the two objectives of this research and their corresponding overarching research questions. Within each research question there were multiple questions asked of course participants and facilitators, and multiple recommendations emerged. Each section within each research question begins with summarized data taken from the interviews. This is followed by results, discussion and recommendations related to that section.

Summarized data, results, discussion and recommendations have been grouped together in this thesis in conjunction with the utilization-focus of the evaluation. It will be easier for TNS representatives to follow and apply the results of the research if all relevant data, quotes, discussion and recommendations for each question, theme, and section are in one place. The fact that there is not a single result or finding from this evaluation, but rather dozens of small points which flow best when presented in context, was another reason for this decision.

The first objective of this research is rendering judgments on the SFL1 pilot, in order to provide feedback and recommendations to facilitate improvements of future deliveries of SFL1 (questions 1a to 1d). The second objective of this research is to solicit, compile and report on knowledge generated about the design and content of SFL2 (question 2). The overarching research questions are:

- 1a. What are the key elements of the SFL1 course design? What worked well in each of those elements? What could be improved in the course?
- 1b. How did the facilitation of SFL1 go (from the participant, facilitator and observer perspectives)? What worked well? What could be improved?
- 1c. What impacts did SFL1 have on participants? Questions to participants to determine impact related to their biggest highlights/takeaways, the stories they tell, their satisfaction with the course, and their use of the TNS Framework.

A topic/question that emerged from the research was:

- 1d. The course is called Sustainability for Leaders – is the leadership element addressed properly? How could the leadership element in the course be improved?
2. What are some recommendations for the development of the SFL2 course, based on SFL1 participant and facilitator feedback, my own ideas, and best practices in adult education?

Note: The questions from the various interviews/questionnaires are underlined, and numbered according to the interview guide (See Appendices B, C, D, and E). The order they are presented represents the themes and research questions. Summarized data and results to research questions were derived from participant and facilitator interviews. Discussions and

recommendations were derived from interview data, and my own observations and ideas. Key recommendation points appear in bold under the research questions, and their sub-themes and sections for ease of use and understanding.

Coding for the interview questions is as follows:

- PPP after the question means it was from the post-program participant interviews (within ten days of program completion)
- FI after the question means it was from a facilitator interview
- TMFU after the question means it was from a participant follow up interview three to four months after the course
- ETMFU after the question means it was from a participant follow up e-mail survey three to four months after the course

Research question 1a. What are the key elements of the SFL1 course design? What worked well in each of those elements? What could be improved in the course?

Twelve key elements or themes that make up the SFL1 design were distilled from my analysis of answers to the interview questions. These themes have been used to form the organizational framework for compiling and summarizing relevant interview data, results, discussion and recommendations. The themes are:

- 1.a.1. Marketing
- 1.a.2. Clarity of course goals/objectives
- 1.a.3. Pre-course information
- 1.a.4. Workbook
- 1.a.5. PowerPoint
- 1.a.6. Course opening

- 1.a.7. Improving the funnel
- 1.a.8. Adding E to ABCD
- 1.a.9. Twenty minute presentations
- 1.a.10. Networking
- 1.a.11. Support and follow-up
- 1.a.12. General and overall improvement areas

Marketing

Summarized data.

Marketing describes how participants heard about the course, why they decided to attend, and participant suggestions for increasing future attendance in SFL1.

5. How did you first hear about TNS, Sustainability for Leaders – Level One course?

(PPP)

There were 16 responses including: three individuals who heard about the course through TNS advisors or board members, and seven participants who had heard about TNS from different places (including Good Work Canada, and TNS's work in Whistler), and then found out about SFL1 specifically from the TNS website. The rest of the responses included individuals whose organizations were already involved with TNS in some way.

7. Why did you decide to attend this course in the first place? (PPP)

Of the 12 responses, most related to wanting some practical applications of TNS. Four participants mentioned knowing TNS well, but wanting more details on its implementation (what questions to ask, practical implementation of TNS, etc.). Three responses specifically cited the desire to improve sustainability in their organizations, three more wanted methods to present sustainability effectively, and two were networking related.

6. What do you think would be the best way for others to learn about future deliveries of this course? (PPP)

There were eight responses to this question; some were general (two mentions of social networking, two mentions of list serves, conferences, TV ads, brochures, municipal websites, and word of mouth), and others were more specific. Specific ideas included: having an official certification attached to the course to put on a CV; get endorsed by a bigger, better known organization (e.g. Suzuki Foundation) and have them link to TNS; go through the higher education associations to target that market; register SFL with the Canada School of Public Service which “helps ensure that all public service employees have the knowledge and skills they need to deliver results for Canadians” (CSPS, 2011), but which has no results related to SFL in separate searches for ‘Natural Step’ and for ‘Sustainability’.

Results, discussion and recommendations.

TNS Canada’s mission of “connect(ing) every leader in Canada with the inspiration and learning they need to make strategic choices for the long-term benefit of our environment, economy and society” (TNSC, 2007, p. i), matches well with a goal of SFL1 mentioned informally by a course facilitator: “(with SFL1) we are aiming to spread use of the TNS Framework up and out in Canada” (personal communication, November 14, 2009). It is therefore important for TNS to know how people are connecting with the course and what they are expecting. The way people found TNS and SFL1 varied (from personal connections to TNS, working with organizations already connected to TNS, and just having general professional or personal interest in sustainability) but the common theme was individuals obtaining specific information from the TNS website after their interest had been piqued.

The main reason people gave for attending the course was to get practical applications of the TNS Framework and tools. There was also substantial interest in networking.

It was just more to get that hands on approach...see how do you work at implementing this? What does it look like? What are the questions that you ask? What are some of the issues to watch out for and the practical implementation of it...I always like different courses... for the networking aspect where you get to find other people who are interested in the same thing, people that you can collaborate with and learn different things from. (VAN3, p. 3)

Recommendation: based on the multiple ways people heard about the course and their reasons for attending, **TNS should continue to market the practical, applied nature of the course**, and should also pursue additional opportunities to market the networking aspect of the course (connecting individuals who care about sustainability through TNS). Backing up that marketing by providing more overt opportunities for networking within the SFL1 frame would help create that connection. See Networking section 1.a.10 below for more detail.

Recommendations: There were multiple participant ideas about getting people to hear about future deliveries of SFL1. Two specific ideas worth mentioning are:

1) Several participants worked at post secondary institutions. One participant who teaches sustainability at UBC introduced TNS tools to her lesson after SFL1. **TNS could make an overt effort to incorporate TNS story and principles into higher education sustainability curriculum**, which could in turn lead to more enrolment and interest in TNS in general.

I have been put into a sort of sustainability leadership role at the college and trying to research as much as I can about what is going on right now, what's available to the college, to myself, to this department as well for faculty development... Natural Step was another option that came up... I think I just found it online. (HAL1, p. 2)

2) **Register SFL with the Canada School of Public Services (CSPS).** Sustainability training through TNS could be a great option for public service employees seeking professional development, which could increase enrolment in SFL1.

Clarity of Course Goals/Objectives

Summarized data.

These questions dealt with assessing the clarity and transparency of the course's goals to participants, and the goals of the participants themselves.

9. What expectations did you have coming into this course? (PPP)

The 12 responses mentioned multiple expectations including: eight mentions of learning TNS basic concepts and how to apply the Framework; three mentions of learning to engage an organization in sustainability; three mentions of a TNS 'refresher'; three mentions of hearing from TNS experts; and two mentions of networking to "see who was there". The remaining responses (one each) included applying TNS to government policy, getting feedback on presenting sustainability, personal sustainability, philosophical questions (consumerism vs. sustainability), and one response of not knowing what to expect.

8. In your own words, what do you feel were TNS's objectives and goals for this course? (PPP)

All ten respondents noted that the goals of the SFL were to help people to be familiar with and able to speak about and apply the TNS Framework (training the trainer).

17. Thinking back to when you arrived on (whatever day), do you feel like you had a good understanding of TNS's goals and objectives? (PPP)

The two responses to this question stated that they had difficulties with the opening of the program and felt that facilitators did not make the goals and objectives clear (both from Calgary delivery –the only ones who were asked this question).

Results, discussion and recommendations

Participant goals for the course and their perception of TNS goals and objectives were similar, in that they both included becoming familiar with the TNS Framework and being able to apply it. “I think I wanted to become more familiar with the concepts and I think hearing it more than once from the people who are experts in that field made it easier for me to be able to explain it to somebody else... and networking opportunities” (OTT 3, p. 3);

I thought I would learn about the Framework and figure out how I could use it in my setting... if I would be able to actually use it in my own organization” (OTT1, p. 4).

“Graduates are able to explain and begin to apply The Natural Step Framework for Strategic Sustainable Development to help their business, community, or organization take a leadership role in sustainability. (TNSC, 2011b)

Recommendation: Have a more overt focus in the course objectives from TNS on participants applying the tools back in their organizations. This would support Knowles’ (1980) ideas about adult learners needing immediacy of application. This could be accomplished by inserting a page in the early part of the workbook where participants answer questions related to what they want to do in their organization/professional situation related to sustainability. After each segment of the course is taught there could be one or two sentences to complete where the participant considers direct application of the tool or concept to their situation. This would take minimal time and create a documentation of specific applications for each participant that would directly meet their objective for taking the course.

Pre-Course Information

Summarized data.

The following questions dealt with pre-course materials, communications and web based information participants received before the course began.

10. This course started with a welcome package – any comments? (PPP)

Of the nine responses, seven noted overall positive feelings about the welcome package. Specific positive comments highlighted the sections on addressing food concerns, when to get there, where to stay and knowing what to expect, including the homework. Of the two participants that did not respond positively to the welcome package, neither had spent much time with it. A noteworthy comment from a participant who was otherwise positive about the package was that the welcome package asked participants to offset their individual carbon impacts of travelling to and taking the course, but there was no specific acknowledgement or discussion of it during the course.

11. Online Sustainability 101 course – comments? (PPP)

All eleven responses to the question were positive, and included comments on having access to the online course in advance of SFL1 and for a full year after the course, the layout of the course itself and the timing (not too short, not too long). One participant wished the online course had been acknowledged or referred to in the course itself to connect the online and live learning.

12. Is there anything else you would have wanted in advance of the course? (PPP)

There were two responses: one requesting more notice for the e-learning and of the homework on the first night of the course (this was a Calgary participant – first course delivery). The second request was for more logistical information, e.g. to list a few more hotels and provide specific directions for finding the room once in the building.

Results, discussion and recommendations.

Participants were positive about the welcome package and the online Sustainability 101 course, and stated that the online course gave them a good introduction/refresher to TNS. “I like having the (welcome) package, I knew what to expect including the homework, the time

commitment so I could plan accordingly... it was comprehensive, with info, but not too overwhelming – good balance” (OTT, p. 4);

“That (Sustainability 101 online) was my foundational exposure to TNS... it was a great course... an overview that left me wanting more... I like that it has many different types of visuals... the (online) course itself isn’t referred to (in the session), but the content absolutely is...it’s the same material in my mind” (CGY3A, p. 2)

Recommendation: Build off the positives that the welcome package and online course create, such as a positive learning experience in Sustainability 101, participants feeling organized, and interested in learning more about the TNS Framework.

Positive pro-environmental aspects of the course that are mentioned in the welcome package (such as the vegetarian food and suggestions for carbon offsetting travel to the course), could be used as examples of TNS “walking the talk”. Willard (2009) describes “walking the talk” type actions as the first of his seven leadership practices for sustainability change: Get Credible, Stay Credible. Overall, the comprehensive nature of the welcome package would make a good checklist for the course facilitators to ensure completeness.

Workbook

Summarized data.

The workbook is handed out at the start of day one, and flows chronologically with the course agenda for the two days. The workbook contains facts and information, directions and tools for exercises, and areas for reflection.

13. Looking at the workbook, are there any comments about the setup or the workbook in general? Does anything stand out to you as a highlight or as being particularly effective? (PPP)

Of the seven responses, the fact that the course flow followed the workbook was noted as a highlight three times. There were two positive mentions of the visual images, including use of

images from the workbook within the course itself. There were also positive comments about the details, the agenda, and task numbering.

14. Still looking through the workbook, is there anything that you feel is missing? Is there anything in there that you felt is not useful or redundant or just does not work? (PPP)

Of the seven responses, four mentioned that more space for notes for their own application and ideas would have been good. Two responses requested help with presenting TNS information to other people (i.e. principles in “common” language and adding a FAQ section for people who are presenting the principles so participants are ready to answer questions when presenting to others). Two responses requested layout changes, including more obvious differentiation between sections, and a request for headers for pages that matched the topics (rather than just Sustainability for Leaders at the top of each). Other suggestions included: having a couple of pages that could be pulled out and used as a mini poster (for a reminder); removing the words READ or LISTEN (seen as too childlike) from the instructions and; putting the course agenda on the first page.

15. How do you envision using this workbook in the future? (PPP)

Of the 11 responses, eight responded that they would use the workbook to present TNS to others. This usage included preparation for presenting TNS back at the workplace, to explain TNS to a client, to create coursework for a university sustainability class, to guide a sustainability 101 workshop (for creating questions and tasks), and as a guide to specific concepts (e.g. backcasting, funnel etc.). Three participants said they would not use the workbook, but two of those three said they would simply prefer to use the online course or the TNS Sustainability Primer to review the TNS Framework.

10. Looking at the workbook, are there any comments about the setup or the workbook in general? Does anything stand out to you as a highlight or as being particularly effective? (FI)

Four facilitators responded with multiple positive comments, including two mentions of facilitators and participants having the same workbook as an example of TNS transparency (which is a core value of TNS), the fact that there is a base version of the workbook for each SFL1 delivery and facilitators have time budgeted in advance to tweak and personalize it based on pre-course surveys and their own ideas, the workbook allows participants to listen or read depending on their learning styles, the workbook gives participants a takeaway which can help them with future presentations, the workbook gives written instructions to the exercises which allows for better flow of the course (participants can read if they don't understand), the workbook is well organized, and the fact that other participants gave positive verbal feedback about the workbook.

11. Still looking through the workbook, is there anything that you feel is missing? Is there anything in there that you felt is not useful or redundant or just does not work? (FI)

Two facilitators responded to this question and provided multiple ideas for changes. These included providing more space for notes within the workbook, changing direct instructions such as 'LISTEN' to something softer like 'the facilitators will give an overview', providing examples of the four sustainability principles in plain language (as an appendix), and putting the specific instructions for the homework into the workbook (they are only in the email).

12. How do you envision participants using this workbook in the future? (FI)

The single facilitator response stated that participants would use the workbook for reflection and direction on running TNS exercises or activities.

Results, discussion and recommendations.

The workbook was well received by participants for its flow following the course agenda and its visual images. Facilitators also like the workbook:

The workbook itself... is quite well thought out in terms of process and time... and very transparent (with) what we are doing so there is no ‘their version’ and ‘our version’, (participants) essentially see what we see so it’s very transparent in terms what we try to do as a learning objective. (FAC1A, p. 4)

Recommendation: Adding additional space in the workbook to personalize and add notes, comments and practical application ideas. Eight of the eleven participant responses about how they would use the workbook related to using it as a basis for presenting TNS to others and more space for writing was a common theme for workbook improvements.

There are places where I wanted room to make notes of my own, and I’ve had to squeeze it into the margins. I like to make my own notes... put my ideas into the context of what we’re talking about, and I think that’s important. (CGY3A, p. 4)

Recommendation: A participant suggested the addition of FAQs to make the workbook a more practical tool:

In the presentation of the system conditions or principles... include FAQs on the typical critiques or questions they always get when they present (them)...partly what they are doing is selling this framework, and if people stumble here, it’s pretty hard to chew on the stuff after... I think we ended up spinning our wheels a little bit. (CGY4, p. 10/11)

Recommendation: Put Max-Neef’s human needs information back in the workbook.

I observed an important omission from the workbook (also mentioned by two participants), related to human needs, in the fourth TNS systems condition. This subject is taught using PowerPoint and discussion, and is based on the identification of nine human needs by Chilean

economist Manfred Max-Neef (2010). For participants to present human needs to others, having access to the language of Max-Neef's identified needs (subsistence, protection, affection, understanding, participation, idleness, creation, identity and freedom), would assist them to better explain the intricacies of this concept, and help people understand the theory. Max-Neef's needs were in the materials for the first (Calgary) delivery of SFL1 but removed for subsequent deliveries.

PowerPoint

Summarized data.

These questions focused on the PowerPoint presentations in the SFL1 course.

16. Were the presentation slides (PowerPoint) informative/useful? Any suggestions?

(PPP)

Of the nine responses, eight were positive about the SFL1 PowerPoint slides. The one negative respondent stated that they do not like PowerPoint in general.

Specific positives included: two mentions of the Interface video embedded in the presentation; knowing that they would have access to the slides afterwards and being able to use them for their own presentations; and the overall professional look and feel of the slides.

Suggestions included: four participants wanted a hard copy of the slides to make notes on and work off of during the course; a mention of making it more clear that all the PowerPoint slides would be made available to all participants after the course.

13. Were the PowerPoint slides informative/useful? Any suggestions to change the slides? How? Why? (FI)

Two facilitators responded – both mentioned that having a hard copy available might be good (but both had some concern about the additional paper). One facilitator mentioned the fact

that the SFL1 slide deck has additional slides at the end, which is great because it can help with teaching particular points that arise in a session.

Results, discussion and recommendations.

The SFL1 PowerPoint presentation received positive reviews by eight of nine respondents, who liked the professionalism and particularly enjoyed the Ray Anderson Interface video. Participants had concerns about not having access to the slides: “if I know I can access it later, then my learning in the moment is different” (CGY1A, p. 5). “I like hard copies of things. I know it’s not as sustainable but I like things on paper because I need to see them” (CGY3, p. 4). Facilitators noted the concern about the “sustainability” of printing out hard copies of the slides as well.

Recommendation: Send the slides to participants in advance of the course: that way they know they have access to the information and can choose to print them if they desire.

Course opening

Summarized data.

These questions focused on the first impression participants had of the course and how the opening by the facilitators was received.

18. Do you feel like you had a good understanding of what was going to happen over the next couple of days? (PPP)

Of the seven responses, all generally felt the start of the course was good. Positives included: getting to know where the facilitators were coming from; having a facilitator at the door to greet them and assure them they were in the right place; having coffee ready, and being given an outline of what to expect.

19. Is there anything else you would have liked included in the opening? (PPP)

Five participants suggested improvements: facilitators should have introduced themselves more strongly (featuring their skills and experience); an explanation of the ‘extra’ TNS materials that were available as people entered the room; having a more extended icebreaker/networking piece; provide a way to get to know the participants better – specifically why they were there; delve into content quickly because the course is for leaders and leaders are busy so show that their time is being valued; describing and teaching how to engage people in sustainability in general before getting deep into the framework.

16. Is there anything else you would have liked included in the opening? (FI)

There were three facilitator responses with multiple ideas including: run a world café piece upfront to mingle people and get multiple perspectives (this is a tool used by TNS in engagement); give more background on why the course is being run (building participant capacity); create comfort, interest and excitement within the group (one facilitator noted Sarah did this well in Toronto); and run an exercise that would help them internalize a mental model of what to expect in the next two days.

Results, discussion and recommendations.

It was clear from the research that participants had a strong interest in knowing about the facilitators and their background/experience with TNS. “(It’s) very important to know where the facilitators are coming from because... their ideas and energy is what we were buying into” (VAN4A, p. 8). “I felt that they could have introduced themselves more strongly, that a big reason why people are there is (getting) sufficient sense of Natural Step credibility (and they are) spending money to spend two days with them” (CGY4, p. 5/6). I suggested to TNS Canada executive director that the facilitators highlight their experience more, and that their stories are part of the narrative that participants take back to their workplaces and help to spread the use and understanding of TNS. She replied that TNS facilitators and advisors are taught to be humble and

to make the sessions about the materials instead of about them (personal communication, Jan 15, 2010).

In SFL1, facilitators tell stories of Karl-Henrik Robèrt, and all the amazing things he has done since starting TNS. **Recommendation: the stories of the TNS facilitators/advisors who run SFL1 are also very valuable and could be used by course participants to engage people in their own organizations.** By sharing more of their stories and experiences in the beginning, the facilitators are not only creating credibility for what they are teaching (which participants have said they want), but are also laying the groundwork for positive TNS stories that can help spread the word of TNS across Canada. Further, facilitators that open the course by sharing their stories and experiences early would follow Renner's (1983, p. 10) idea that adults "learn best (in a climate of) trust, mutual respect, support and warmth. In establishing an appropriate climate, the facilitator can focus on his or her experiences and strengths." **Recommendation: Opening the course with personal stories lays the groundwork for trust and respect, and lets the learners know they are in good hands.**

Improving the Funnel

Summarized data.

The funnel is a metaphor used by TNS to describe the increasing pressure that population and consumption are placing on our world (the big end of the funnel) and the decreasing capacity of the earth to provide for the needs and desires of the population (the small end of the funnel). In SFL1 participants are asked to draw a funnel for their organization showing the forces that are putting pressure on the big end of the funnel and describing opportunities for change on the small end.

21. What would you change about day one if you could? Why? (PPP)

Six responses were specifically related to improving the funnel piece of the course. All six participants felt it could have been explained in more detail, and five felt that specific examples could have been given. Specific suggestions for improvement included: give an example of what a funnel drawing could look like before asking participants to draw one themselves; refer quickly back to that part of the e-learning course; TNS USA used a supply and demand explanation at a course in Portland which was described as effective; create and present an alternative metaphor to help people connect with the funnel idea and language.

Results, discussion and recommendations.

When asked about improvements for Day one of SFL1, the ‘Funnel’ metaphor/exercise was mentioned more than any other topic. Representative quotes from three different deliveries included:

They did just jump into the funnel stuff assuming everyone really got it and I know that’s covered in the E-learning but some people didn’t do the E-learning... they could have quickly covered (it again)...and just make sure that everybody actually understood the metaphor... (CGY4, p. 12)

“It would be good to have worked through examples with some things... for example, with the funnel, it’s great as a picture but how about actually working through an example and showing both ends.” (VAN5A, p. 12)

My own course observations matched these comments and I have the following **recommendations:**

- Have **more supplies** (marker pens with more colours, flipchart sheets etc.) ready to make this easier

- Have a **funnel already drawn** on the wall which can be referred to when introducing global sustainability challenges earlier in the morning (i.e. reasons the funnel is closing)
- **Bring up the E-learning** and reference what they already learned about the funnel (perhaps showing a slide from the E-learning).
- When formally introducing the metaphor, refer to (with a visual slide) the funnel **exactly as it was explained in the E-learning** in advance of SFL1
- **Facilitators should illustrate an example** or two of what people might do with this task (e.g. draw a sample funnel and give examples for an organization so people know what they are being asked to do)
- **Refer directly to** the notes and the questions in **the workbook**
- Tell participants to **write the name of the organization on each drawing**, so they are easier to understand when viewed by others
- In the de-brief **ask participants to share something that they learned about their partners' organization** in relation to sustainability.

Adding E to ABCD

Summarized data.

ABCD is an acronym used by TNS to describe their process of working with organizations. (A=Awareness, B=Baseline Analysis, C=Compelling Vision and D=Down to Action). There is talk within TNS of adding E=Evaluation, to the acronym and process, and while it is used in some places, it has not been officially adopted by TNS International.

Two responses about improving the course related to adding “E” to the “ABCD” process. Both responses came from participants in the Calgary delivery. Both felt that evaluation is an

essential step in the sustainability planning process. Despite the fact that TNS international has not officially added it yet, both participants felt that it should be taught in the course.

Results, discussion and recommendations.

As earlier described, ABCD is an acronym used by TNS to describe their process of working with organizations. There is talk within TNS of adding E=Evaluation, to the acronym and process, and while it is used in some places, it has not been officially adopted by TNS International.

Two responses about improving the course related to adding “E” to the “ABCD” process. Both responses came from participants in the Calgary delivery, where “E” (for evaluation) was mentioned. Both felt that **evaluation is an essential step in the sustainability planning process and that it should be taught in the course:**

It would be good to include the E because we all know that’s absolutely vital...

knowledge of TNS International is that the E has not been added officially yet but the fact that it gets brought up by Sarah, and people know about it, it should be in the materials as well... even though it hasn’t gotten the international nod, we know from the practice point of view that it’s absolutely vital (CGY4, p. 14)

Twenty-Minute Presentations

Summarized data.

A key element of SFL1 is an assignment where participants must present TNS principles and tools to other participants in small groups. The presenters define the role their audience will pretend to take on. The idea is to prepare participants ready to present TNS to a live audience.

24. The 20-minute individual presentation at the start of day two – Thoughts?

Comments? (PPP)

All ten respondents felt that to be “forced” to present TNS materials was a positive experience, and seven of them specifically mentioned that it was positive to learn from the other class participants’ presentations as well. Other positive comments included: building on the work of others in the group and using each other’s techniques; the benefits of getting feedback; practicing presentation skills; having to think through it to present it really created learning; and the small group (three people) setting worked well.

Specific suggestions for improvements included acknowledging that TNS materials are presented in a generic way, leaving lots of room to customize or personalize depending on audience; showing examples of different adaptations of the materials for presentation on day 1 so people know that they can be creative; asking if TNS representatives can give some feedback on specific TNS “stuff” in the presentations (comments in this respondents group were mostly on presentation style etc.); allow a little time for working on the presentation during day 1 (and opportunities to ask questions); give participants more guidance about what to give feedback on and how to communicate it (including how to present negatives).

21. Please comment on your impression of the individual 20-minute presentation at the beginning of day two. (FI)

Two facilitators responded with multiple ideas. Both stated that this activity is a very important part of the course, and one said “there is no better way to learn the framework”. Improvement ideas for the 20 minute presentation included: better communication up front that there will be homework on the first night of the course; give specific direction that within the 20 minute presentation presenters must give their version of the four principles in plain language (as this is one of the most important things to be able to do to communicate TNS).

Results, discussion and recommendations.

Delivering a 20-minute presentation of a TNS principle to the other participants at the start of Day Two was described by all ten respondents as a positive experience. The learning that occurs from being “forced” to present helps to engage participants, and assists TNS in its mission of increasing exposure for TNS by preparing people to talk about it. One idea for improvement is based in part on the following feedback: “it was a good exercise... the only comment I have... it’s good to get feedback from your fellow classmates but (it) tends to relate a bit more to presentation style and generic things, maybe not specific to TNS content” (VAN3, p. 6).

Recommendation: TNS should design a feedback sheet to be used as a guide for participants observing the presentations. The feedback would be given to the presenter, and could help guide them in future presentations. This also makes it more likely that individuals presenting TNS to their various organizations will perform at a higher level. The sheets could have categories that included the intended audience and style, and also categories that would solicit comprehensive information about content presentation (e.g. sustainability principles in plain language, slides, personalization to audience, etc.). I observed one participant giving specific feedback to another about improving their presentation for a senior management type audience, where there was nodding and agreement but nothing recorded. With the amount of new information being processed during the course, it is more likely to be retained and used if participants have it in writing. I discussed this idea with a TNS facilitator who responded: “that would be really helpful... (and) as facilitators, it would be good for us to get our hands on that too to see where the gaps are in presentations... so we know where to focus” (FAC4, p. 8). So if logistics allowed it, the feedback forms could be copied for TNS use, and participants could also keep the sheets with feedback for themselves.

Recommendation: Facilitators should mention that much of the material being covered during Day One could be used by participants as part of their presentation on Day Two. The presentation (and first day's homework of preparing a presentation the next day) is mentioned in the pre-workshop package. If it was also mentioned throughout the day as TNS principles are being taught, participants could be thinking about and personalizing their presentations through reflections as they learn about different tools in the framework. At the end of day one, facilitators could be more overt in showing examples of how TNS materials have been customized for presentations to connect with particular audiences (e.g. slides for a corporate focus vs. engagement tools for a grade school audience). On this subject one participant noted: "Sarah touched on it... that TNS is presented in a non-prescriptive, generic way... leaving room for innovation... they should encourage people to come up with that" (VAN2A, p. 10). Discussing and showing how being innovative while presenting TNS is possible, will lead to presentations that are more personal to the presenters, and more likely to be repeated to 'real' audiences outside TNS training.

Recommendation: At the end of day one, facilitators should offer some tips for presenting TNS (the next day and in the future). This could come in the form of a handout containing advice from past participants (e.g. personalizing presentations to the audience, and including storytelling) on one side and from TNS facilitators (e.g. start by asking the audience the top three things on their mind then create links between those things and sustainability during your talk) on the other. The combination of tips from past SFL1 participants and facilitators would help understand what is possible with the presentations they are creating.

Recommendation: when introducing this exercise, have facilitators always tell the story (which was shared in the Halifax delivery) about TNS founder Karl-Henrik Robèrt

giving a 20-minute presentation on TNS to officials from the resort community of Whistler (one of the memorable stories that participants can then in turn tell outside of the course). His presentation led to the community adopting TNS as a guiding factor in their 2020 sustainability community plan. This would accomplish two things: to continue the storytelling method which so effectively connects people with TNS, and also remind participants that their 20-minute presentations could have huge leverage, and are therefore worth careful attention.

Networking

Summarized data.

Having a chance to meet and network with like-minded individuals was a big draw for many participants. This theme explored participants' thoughts and experiences related to networking.

29. There was a diverse mix of people in the room, from different industries, organization and communities – how did you feel about that? How do you think it influenced the course and your experience? (PPP)

All ten respondents felt the diversity was a positive element of the course. Specific comments included: it (diversity) was a true strength of the course and is part of what sets TNS apart; it's good to get different perspectives; liked the diversity, helped to think of where others are coming from; the interdisciplinary feedback was interesting and helpful (particularly in small group work); even more diversity would be good (e.g. someone with a very economic-focused background and outlook in the group); it enriched the experience; it was nice because "you forget there are other industries out there".

Three respondents noted some additional advantages to a different mix, including seeing the benefits of having more people from their sector attending; and the positive aspects of being able to hear from different sectors.

10. Have you been in contact with anyone with whom you took the course? Why and in what context etc? (PPP)

There were six responses to this question, and four participants had met up with people from the course in some positive way. The connections included: a participant who began attending “sustainability breakfasts” which were hosted by another participant; a participant who ended up in a leadership workshop with another SFL participant, and have since connected further; another pair of participants connected on a community garden initiative which they discussed during the course; and one person said “*when you pay for a course part of it is the learning but a lot of it is the networking*”. VAN5B

11. Would you like to have further contact with course participants, or hear about participant progress? If yes – how should this be accomplished? (PPP)

Of the three responses to this question, one participant was too busy for more contact, one wanted contact with individuals who did similar work and the third wanted: online contact, information, and course follow-up; feeling that it is helpful to have a network within a geographical region.

12. Thinking back, would you have liked to have more overt or specific opportunities to interact with other participants during the course time? (PPP)

Of the four responses, two felt the networking time in the course was sufficient. Two stated that more networking should have been done, as they felt it would help with further engagement and application of TNS to individual situations.

Results, discussion and recommendations.

It was clear that the networking aspect of SFL1 is an appreciated aspect of the course that could use even more overt attention to enhance the experience of the participants. Representative quotes included:

Certainly one of my hopes, prior to taking the course, was that I would increase my network of people who care about the earth and focus on sustainability, so I guess if I were to be black and white about it, that objective wasn't met, so something that would have facilitated that might have been helpful. (CGY1B, p. 8)

Best aspect of the course... first thing that springs to mind is the interaction... people are asked to interact with each other, ask questions, talk things over. I think that is a really valuable learning tool, in that you learn best by looking at things from different angles and by discussing it with your peers. (OTT2, p. 23)

We're all coming from such different backgrounds, but all obviously have an interest in sustainability and all had interesting things to say to each other, so it's... that networking idea that we really think we were coming for...in the end that's part of the course as well. (OTT1, p. 11)

One thing that was missing from the entire experience was networking, and just discussing. We had a bit of time over lunch, and I know that is not necessarily the purpose, but a lot of growth comes from those one-on-one discussions with people, which are useful... I think people tend to naturally do that, but maybe it takes a little while to get the motivation or nerve to do so. (CGY3A, p. 9)

Recommendations: TNS should look for more opportunities to facilitate networking for participants within the two days. Specific ideas include:

- **Create a participant handbook containing short bios of the course participants and facilitators as well as their contact information** (this idea was discussed with TNS Canada executive director in January 2010 as part of the developmental evaluation approach, and she felt it was a good idea):

- This information could be provided by participants as part of the course application process
 - There could be space next to each person's information so that individuals could take further notes
 - When people introduce themselves at the beginning of day one, everyone can connect faces to the information, to get an idea of who they want to connect with further
 - An early mixer exercise could include a 'speed dating' aspect, with people instructed to gather more information to put in their booklets as part of that process
- **Use Renner's (2005) icebreaker technique called Four (or more) Corners early in the course** to help people identify sectors within the courses. While opinions were mixed among participants and facilitators about the value of having mixed sectors represented in SFL1, there was definite interest in knowing who was in the room and where they were coming from. TNS could use this technique early in SFL1, as it is a way of physically grouping individuals who come from the private sector, government, education, consultants, and non-profit. This would allow individuals to identify further with other participants, and target their networking within the two days according to their preferences.

Recommendations: Other explicit ways TNS could set participants up to network include: naming an informal meeting place for the evening of day one, where anyone who wanted to could gather for drinks or socializing; starting day two with a bit more overt networking time (i.e. talk to someone you didn't talk to yesterday); taking a group photo to be e-

mailed to the group as part of the follow-up; setting up an open space for conversation over lunch on day two (i.e. people who wanted to meet and discuss a topic of their own choosing would be given a chance to do so); networking opportunities within the course follow-up in the form of reply-all emails answering brief questions to the group; and connection on the TNS Exchange (online network).

Support and Follow-Up

Summarized data.

This theme explores participant thoughts on the current support and follow-up offered by TNS after SFL1 and also future possibilities.

36. Is there any type of support that you would like or expect from TNS moving forward out of this course? (PPP)

There were 14 responses, some with multiple ideas. Thirteen respondents were interested in some form of support moving forward, eight wanted to be connected with people, events and courses through TNS, and six specifically mentioned that a lot was being done already (due to the resource package and the invitation to call or email the facilitators with any questions etc.). Other follow-up desires included wanting: to work more with TNS; to hear real success stories as they happen; a customized TNS course for their city (specifically a different one for managerial and admin staff); a more formalized sequence of training from TNS workshops and courses as prerequisites for others etc.; a class list from the course; more examples of organizations using TNS.

Two participants from the same course delivery (Halifax) were concerned that they had not received the resource package yet (the course had been over for a few days).

8. Did you get the follow-up package from TNS/the facilitators? (TMFU)

Have you looked at it? Was it useful? What exactly did you do with it?

All five respondents had received the follow-up package, but none of the five had done anything with it yet.

9. What type of follow-up or support would help you the most in accessing and applying the TNS Framework / tools? (TMFU)

There were five responses – all different. Two mentioned that they wanted more information on actual case studies and success stories (i.e. current updates of who is using TNS and how they are doing it). Other responses included: sector specific webinars; learning to teach TNS principles; and continuing the current phone and email support from TNS.

31. What types of support do you feel would be most useful for participants to effectively implement the course materials? (FI)

Both facilitator responses felt the current support system (openness to answering calls and emails and providing the post course resource package) was quite good. There was also an idea for a follow up call/webinar with each course group to talk about how participants were using the framework and what they were getting out of it.

In a separate interview, the director of learning for TNS USA mentioned undertaking a personal follow-up call with 80-85% of participants from four TNS USA SFL1 courses in 2009.

Results, discussion and recommendations.

Thirteen of fourteen participants were interested in some form of support following the course. It was acknowledged that the resource package and invitation to call or e-mail TNS representatives with questions was already a good level of support. There was interest in additional connection with people, events and courses through TNS, including information about TNS case studies and successes.

Representative quotes:

I want to hear about everybody who is doing this, I want to know how strong our ranks are... you hear success stories from TNS and they are all huge organizations... its kind of difficult to relate to (VANSTORY, p. 8)

What would be great is (hearing about) more case studies that are completed and (if a new business is introduced to TNS or new statements being made by businesses who are working (with them), or achievements, or news alerts. (VAN5B, p. 10)

Facilitator quote about the resource package:

We are sending this (resource file) out to everybody because... it's the same resources that come up over and over... as we continue to do more sessions and there is greater interest in additional resources we can add those to the file... we've got a good start now... I know people are anxious to get it, I've been getting emails that say thank you for the workshop and I'm really looking forward to having those (FAC2B, p. 9)

The follow-up package for SFL1 developed as the course evolved. In the first delivery (Calgary) facilitators were referring to particular resources (articles, images etc.) that they said they would get to participants after the course. In the next delivery (Vancouver), facilitators referred directly to a resource package they would send participants after the course. Some of the package content was based on what was sent to Calgary participants, and additional resources (articles etc. which were referred to in the course) were added to the list that was kept by one of the facilitators. I had a conversation with one facilitator (during the Halifax delivery) about the follow-up package, who agreed to post a list at the front of the room that identified the resources that would be sent to participants as follow-up, so they did not have to worry about keeping track of all of them during the course.

An interesting response to the resource package is that although the idea of receiving it was positively anticipated by participants, all five respondents in the three month follow-up survey said they had received it but had not done anything with it.

Recommendation: To continue the networking aspect of the course and encourage use of the resource package, a facilitator could send three follow-up emails to each SFL1 class in the months following the course (at one, three, and six months after the course). (The follow-up email would ask the group to ‘reply-all’ to the email.) The email could contain up to date TNS information (link to a live case study or success story) and two or three simple questions about the information sent in the email, plus their use of any of the follow-up resources or the TNS Framework itself. This would allow participants to remain connected and feel some accountability for putting the resources to use (be it by reading an article that was sent, or using TNS slides in a presentation). Based on the responses, the facilitators could respond to the group and/or to individuals whose ideas and/or application of the TNS Framework warrant further attention. This follow-up and accountability would be optional and participants could opt in or out for the three emails at the conclusion of the two day course.

General and Overall Improvement Areas

Summarized data.

The interviews contained multiple questions about participant and facilitator ideas for improving the course. This theme explores their many suggestions.

21. Day One Improvements (PPP)

There were ten responses with multiple ideas for improvement including two mentions of having smaller groups within the session (i.e. groups of three vs. groups of five or six) where individuals get more air time for applying learning to their own situations. There was also one mention of each of the following: improve describing the entire framework and how it works;

improve the explanation of the funnel exercise before the group draws it; include the human needs piece in the workbook; add tools on how to get people in an organization engaged/on board for sustainability; and add more physical movement.

23. Day Two Improvements (PPP)

There were nine responses with multiple ideas. Six related to the hands-on case study example including three mentions of keeping the focus on the process rather than the details (and putting up a map of the whole process at the beginning). Other improvement ideas included: using a train the trainer approach; have a Q+A with guest presenters who have actually implemented TNS; more talk of who is using TNS - *'want to know how strong our ranks are'* (VANSTORY); have a (better) recap at the start of day two; create an action planning worksheet that people can take home; rotate the groups in the case study exercise to see what other groups had been doing.

32. Can you name an area of improvement you would like to see in the course? (PPP)

Of 11 responses, four mentioned more networking, three responses were around leadership and having more discussions of how to become a leader, and two mentioned more open discussion. Two participants suggested less time be spent on the resort case study. Other ideas included: hearing from a CEO who is in the process of implementing sustainability; providing a rationale for the activities in TNS Framework exploring the TNS website; improving the recap on Day Two; providing certification for SFL1 that could go on a CV.

14. Is there anything you would suggest for change and improvement to the course?

(TMFU)

Four responses included: be more aware of the course audience, don't seem 'rushed'; include more facilitated networking opportunities (and more pre-preparation recommendations;

include conversations with business leaders who are applying TNS; and a script and role play for selling sustainability.

Results, discussion and recommendations.

Recommendation: Give more attention to individual participant experience making SFL1 more about them. There was a range of responses to questions about overall improvement of the course but one theme that emerged was individuals wanting the course to be a little more personalized. A number of participant suggestions as to how this could occur included: smaller groups (for more individual airtime); more reference and application of TNS to individuals' particular situations (see previous recommendation to have reflections inserted into the course, where participants reflect on the application of a tool or topic to their own situation); having a small amount of class time dedicated to navigating the TNS website and showing individuals how to locate and use resources they might need and use; focusing more on the process than the actual details of the fictional case study, which relates to the recommendation to more overtly teach participants to teach or use TNS as it is being introduced to them; recapping what was learned back to participants; and providing certification for SFL1 that could go on a CV.

Questions around general improvement to SFL1 also related to other topics including networking, human needs, and leadership, which are addressed in other parts of this thesis.

Research question 1.b. How did the facilitation of SFL1 go (from the participant, facilitator and observer perspectives)? What worked well? What could be improved?

Facilitation: questions to participants – summarized data.

The following data is summarized from the participant interviews related to SFL1 facilitation.

25. Facilitator questions – As a team did they: (PPP)

A. Clearly explain objectives?

Of the 12 responses, 10 felt objectives were explained clearly. Two felt that more explanation/examples should have been given before some exercises.

B. Sustain the interest and participation of the group?

All 10 respondents were generally positive. Two participants mentioned that their interest waned on the second half of the second day and that facilitators should have stepped up and refocused the group. Two participants mentioned that the small groups tended to get off track. Positive notes included: the teaching segments going back and forth between two different facilitators was helpful and well timed; participant questions were well answered; facilitators read the group quite well.

C. Have their teaching segments organized effectively?

All seven respondents felt facilitators were very well organized. One respondent stated they were organized 'to the point of being intimidating'.

D. Give clear directions for tasks and exercises?

There were 10 responses; six felt the directions could have been improved and four felt they were clear. Ideas for improvement included: mention things ahead of time to help with logistics (papers, page numbers etc.); do not hurry through directions; put key points on whiteboard; be more specific when checking in on groups to ensure they are on task.

E. Clarify and answer questions from participants?

Seven participants answered this question and all responded very positively about how facilitators clarified and answered questions. One commented that it felt like the facilitators were there for them, not the other way around. A specific quote which stood out is:

I was actually very impressed with both of them...In terms of their speaking ability, their clarity, they also presented the material and they brought personal examples or personal experiences to the lecture, which makes it much more three dimensional... It's presenting the material with reality...that's what sets them apart. It makes them better teachers... people will retain information better if they have something other than what's written in the workbook. (OTT1, p. 19)

26. Strengths of facilitators

The 15 responses included many references to the positive balance of the team that was facilitating the session. Seeing facilitators work together, confer and collaborate as a team was noted in five responses. Facilitator strengths that were noted included: great energy, passion, professionalism; articulate, engaging, approachable presenters, ability to speak to the examples, great leader, maturity, honouring peoples time, great at responding to questions, welcoming, experience (and giving examples of it), orchestrator of content, humble, listening, accepting questions and even criticism of the TNS Framework, humour, not threatening, describing personal stories and sustainability journey, great for the French speakers, lively, knowledgeable.

27. Improvement areas for facilitators

There were six responses to this question, with three of them requesting more information about facilitator experience at the beginning of the sessions, two that requested more time for unstructured conversations and questions, and one that focused on ensuring that the activities and energy did not lag.

Facilitation: questions to facilitators – summarized data.

The following data is summarized from the facilitator interviews related to SFL1 facilitation.

1. Did you have any personal goals going into this session? What were they? Were they met? (FI)

There were three facilitator responses; one stated goal was to get the group laughing and to learn from participants, and two responses were general (to do well, get the group engaged).

7. Thinking about your time in advance of Sustainability for Leaders – Level One, what are the things you did to prepare for facilitating and leading this course? (FI)

There were six facilitator responses, including four mentions of reviewing the advance participant surveys and adjusting the course because of them, and four comments around learning from past deliveries (from themselves and other facilitators) and making small changes. Two said facilitator experience is a key piece of preparation: *'we're essentially sharing our experience'* (FAC1A, p. 4).

6. Is there anything you would do differently, or any unmet needs you found you had, in advance of facilitating this course again? (FI)

Three facilitator responses included multiple ideas: better room selection for the session (acknowledging this is difficult from a distance); sending participants advance questions on governance and organizational change to get them thinking early; having a facilitator's guide with additional notes about unpacking the exercises (a lot is left up to the individual facilitator at this point); asking participants to bring projects they are working on to assess them, based on TNS principles.

7. Were the pre-course surveys the participants filled out online useful? In what way? (FI)

Both facilitators who responded felt the pre-course surveys were helpful in highlighting participant expectations and needs.

14. What concepts/questions/reminders etc. do you think might be good to have on display in the room (whiteboard or flipchart paper) during the entire course at all times (to assist visual learners)? (FI)

There were four facilitator responses. Two generally endorsed things displayed in the room (one suggested adding plants). The other two responses included more details, such as: a place for participants to share their ideas (a bike rack); a place to share the best information that comes out of the 20 minute presentations; a graphic of the ABCD process; the four sustainability principles; backcasting; and posting reminders for different exercises. .

17. What stood out to you as a highlight or important activity on day one? Why? (FI)

Three of the four facilitators mentioned TNS core concepts and principles as a highlight. Other highlights mentioned were: strategic goals and action planning; subtleties of the TNS Framework and its application; case studies; and the common language exercise (a blind drawing exercise).

28. Thinking about the course overall – were there any particular highlights that come to mind for you – things that went really well overall? (FI)

Three facilitators responded with multiple highlights including: people understanding the sustainability principles at a scientific level; the balance between exercises and presentation; the networking opportunities; the Williams Lake case study example; getting people outside; the good attendance of the courses (the interest that is out there for TNS); and the enthusiasm and commitment of the participants.

Four facilitator interview questions are combined here, because many of their answers to the specific questions wound up drifting across the entire course:

18. What would you change about day one if you could, and why? What would you change about day two if you could, and why? Is there anything in the agenda that you would change, now looking back at it? Visuals? Reflection time for participants? Activity or physical time? Food? Feedback from participants? Different focus? Again thinking about the course overall, was there anything that has not been mentioned that you felt did not work or could be changed or improved? (FI)

Combining the answers to four questions about course improvements from the six facilitator interviews yielded a number of different ideas.

All four facilitators (two of whom were interviewed after two different deliveries) talked about wanting to include more stories and case studies, selecting better case studies and looking for local case study examples. All four also mentioned improvements to the setting; seeing the room in advance, livening it up, having more green in the room or near the room, and attention to minor logistics in the room (coffee, chairs and tables etc.). Three facilitators talked about livening things up with a kinesthetic activity, particularly on the low energy afternoon of day two. Two comments focused on improving the execution of the funnel exercise and two suggestions for better food were noted (not from the Vancouver delivery, where the food was praised). Other improvement areas that were mentioned included: less time spent on the world café activity; clear information that the tools used in the course are the same ones that TNS uses in the field; have more optional exercises prepped; space to organize an informal social on the first night, an activity to identify participant next steps after the course, and time for participants to reflect on their own organization's challenges with the group rather than spending all the time on a theoretical case study.

23. Reflecting on your own performance – can you name some things you felt you did well and some things you felt you could improve? (FI)

There were five facilitator responses with both positives and improvement areas mentioned.

Positives mentioned included: good preparation (including working with surveys); humour; the Williams Lake example with pictures; pacing and balancing of information with activities; reading the room and addressing concerns; noting a low energy participant, talking to him at the break and incorporating his feedback into the next part of the session; giving a relevant, specific example or story when a question is asked.

Improvement areas included: managing personal energy better (not being so drained by the course); adding more energy, enthusiasm, and kinesthetic activity to the course; being sharper with debriefing exercises such as applying the concepts to people's own work; and sharing more good TNS examples and stories.

Facilitation – results, discussion and recommendations.

Recommendation: SFL1 facilitators continue to build on facilitator strength areas including:

- Clearly explaining course objectives
- Staying on track and well organized
- Clarifying and answering questions with personal examples: “*we’re essentially sharing our experience*” (FAC1A, p. 4)
- Focusing on TNS principles and core concepts to ensure understanding
- Using humour throughout the course
- The two facilitators working as a team, conferring, collaborating, and backing each others’ points up with stories and examples

- Reviewing the advance participant surveys and tailoring the course to the participants
- Describing how elements of the Framework being taught can be used by participants in what they do. One facilitator noted that “it’s useful to share the tools that we have with people and I’m not sure everybody understood we designed the workshop the way we did so we can say: this is how we actually work with organizations, so when we work with Landmark, Williams Lake and Roman Haws, this is actually how we go about doing this stuff... I think people were a bit frustrated that (this) was sort of ‘hypothetical’” (FAC2A, p. 17).
- Learning from past deliveries of TNS material in SFL and other settings (doing lessons learned)

Recommendation: TNS address improvement topics identified by participants, facilitators, and the evaluator in three specific areas:

1) Increasing participant knowledge and understanding of the facilitators experience through the following:

- Advance facilitator bios to participants and/or facilitator bios in the participant bio booklet recommended in the networking section.
- Stronger course opening in terms of detailing experience with TNS (including letting participants know about the stories and case studies to come)
- Reminding facilitators in advance of the course that participants are interested in knowing they are learning from people with lots of TNS experience. “I wanted to become more familiar with the concepts and hearing it more than once from the people who are experts in that field makes it easier for me to be able to explain it to somebody else” (OTT3, p. 3)

2) Facilitators should focus on explaining the myriad TNS resources available for use, and connect those resources to the experience of the course through the following:

- Making more overt references to the Sustainability 101 online course throughout the explanation of the TNS Framework
- Explaining what the “extra” TNS materials handed out at the course are for (e.g. *Sustainability Primer for Alberta* was available at the Vancouver delivery on a table but was never addressed – A participant pointed out this was confusing and should have been addressed).
- Continue to emphasize TNS representatives’ actual use of the tools being taught in SFL1 with organizations and communities
- Feature the TNS website and The Natural Step Exchange during the course, by having participants pull up the site on their laptops (with a mirror PowerPoint for those without computers)
- Put posters/flipchart sheets on the wall during the course featuring key TNS tools and ideas including:
 - The four TNS principles of unsustainability
 - Definitions of ABCD (from the TNS Framework) which can be referred to by facilitators and followed throughout the course by participants
 - The three “down to action” questions from the TNS Framework which are meant to guide all decisions (1 – Does it move us in the right direction? 2 – Is it a flexible platform? 3 – Is it a good return on investment?)

3) Follow through on suggestions for improvement from participants, facilitators, and the evaluator:

- Give more case study examples, with a focus on local case studies if possible
- Improve the set up of the room with ideas such as posters or sheets with key TNS concepts on the walls, and better advance organization of room logistics (chairs, tables, coffee etc.)
- Improve directions given for exercises (clear examples of what is expected etc.)
- Have more kinesthetic activities and movement to increase energy
- Have a whiteboard in the room to be used for quick notes, key points on exercise instructions, recorded ends of break and lunch times etc. would be an eco-friendly way to be sure everyone is on the same page
- Bring attention to the personal energy of facilitators (one facilitator mentioned the need to manage personal energy better and not be so drained from leading the course)

Research question 1.c. What impacts did SFL1 have on participants? Questions to participants to determine impact related to: their biggest highlights/takeaways, the stories they tell, their satisfaction with the course, and use of TNS Framework.

Impact on participants: biggest takeaways – summarized data.

20. What stood out to you as a highlight or an important activity on day one? (PPP)

There were 12 responses, some with multiple answers. Seven responses mentioned case studies and examples, including two specific mentions of the Ray Anderson video. Backcasting was mentioned twice, as was the blind drawing exercise to show the value of common language in sustainability. The introduction of new words came up twice (one was ‘unpacking’, the other was ‘rethink’).

22. Day two highlights (PPP)

There were seven responses, some with multiple answers. Two responses highlighted real case study examples (including Rocky Mountain Flatbread and how they used ABCD planning

methodology). Two mentioned the theoretical case study (Paradise Mountain) , and two participants liked revisiting the concepts that were most important to the group at the end of the day. There were two mentions of having a global action plan and then getting down to action planning and one mention of Force Field Analysis.

31. Thinking about the course as a whole – what is the best aspect of the course? What did you find most interesting or most useful? Why? (PPP)

There were 13 responses with multiple answers. Eight people highlighted networking, learning from and working with the other participants. Four responses were about strategic planning. Learning the right order (or a formula) to follow for presenting sustainability and TNS was mentioned three times, as was learning from TNS people and the case studies. Other best aspects mentioned once were: the four TNS sustainability principles; the drawing exercise for common language in sustainability; the discussions after the guest speakers.

39. Is there anything else that we have not covered that you would like to mention about the course? (PPP)

Of 11 responses, four mentioned the great facilitators. Other positive responses included: being pleased that there was an evaluator (myself) in the room to provide course feedback, and thus allowing the participant to concentrate on the course itself; a mention of the quality of the participants; kudos for the fantastic food and sustainable catering (Vancouver), and for a transit-accessible location; a person who felt being challenged to do an elevator pitch was good; and a participant who said they had already told many people how useful the course was, and hoped their supervisor would send them to SFL2.

Negative comments and/ or questions included a person who had issues with sustainability principles (particularly #1 and #2); a query about why TNS pamphlets were given

out on day one with no explanation, and a request for more ideas of how to engage people within an organization. A final comment from one participant was “*I have a question – what is the purpose of doing this course? It did not come across*” (HAL1, p. 20).

3. Thinking back to the course itself, what stands out to you most now? What do you remember? (TMFU)

There were five responses with multiple answers. The positive memories included: it was a good and worthwhile course; the great facilitation; the Max-Neef human needs information; the real life examples (Williams Lake); real applications of the framework and tools; the experiential activities (group work, 20 minute presentation and one-on-one conversations).

Two negative memories were noted: a TNS representative in the group (not a facilitator) made statements during group work which this participant felt were untrue, and an individual who felt that as a practitioner of sustainability, they didn’t get enough out of the course (but knew that SFL2 was coming).

15. Is there anything else you would like to say about your experience in the course? (TMFU)

There were four responses. The two positive responses were: great overall experience – had a great time; instructors were fabulous. One respondent was a leadership consultant who was concerned that it will be hard to apply the TNS Framework tools unless they were doing a TNS project or assignment. The final comment was that TNS was hard to apply at a grass roots level.

Impact on participants: stories participants tell – summarized data.

Participants were asked after three months to recount how they tell people about TNS and SFL1.

1. The story I tell people about TNS and my experience in the Sustainability for Leaders course is... (ETMFU)

There were 11 responses, which included a broad spectrum of responses ('story' was interpreted in multiple ways via email).

Responses that related to the SFL1 course included: the course was interesting, but better suited to business owners than government employees; you need to be interactive to 'get' the course –as you get so much from the other participants; the course was a practical introduction to how organizations can start planning for sustainability; TNS creates a common vision towards sustainability – the course was a good way to practice TNS tools.

Responses related to TNS in general included: TNS helps with grasping the essentials of the current sustainability reality; TNS gives examples of the different social and cultural dimensions of sustainability; the TNS Framework helps you put the pieces of the sustainability puzzle together; relief! – TNS provides a framework that goes beyond the triple bottom line; TNS is valuable for buy-in and visioning, not sure about TNS after that stage; *“TNS offers an objective method to evaluate current conditions, identify our strengths, our challenges, and our hopes ... and guide us in building the community we desire”* (CGY10).

1. What is the story that you tell people about your experiences in the course? (TMFU) – Same question as above, but this one came from interviews, not e-mail surveys.

There were five responses: SFL1 covers the basics of the TNS Framework and why it's important; the course is good for those who don't have a huge knowledge of sustainable business work, but is quite science heavy to non science people so there is a communication gap; SFL1 is an excellent course; respondents were impressed with facilitation, and were pleased to be a part of the process. A fourth tells people that SFL1 was a great course and recommends it, their favourite part being the four root causes of unsustainability. The fifth respondent stated that sharing the TNS info with the town council that sent them there was the only story they told.

2. What do you tell people now about TNS in general? (TMFU)

There were five responses. One tells a story of the examples and TNS people from SFL1, and is able to tell people TNS is gaining momentum. Another connects the TNS story to their own story of wanting to work with organizations that are behaving more sustainably. A third tells people that the TNS Framework is really good for embedding sustainability in business, but that the four systems conditions are hugely conflicting with many business imperatives. The fourth respondent talks about really liking TNS, with specific attention to the eye opening “four root causes (of unsustainability)”. The final respondent said they have never talked about TNS.

37. Would you recommend this course to a colleague now? Why? (PPP)

All eight respondents said yes. Two of the respondents had caveats (one would only recommend SFL1 to someone new to sustainability, and the other would describe carefully what the course was like, as they were unsure what to expect when they took it).

Impacts on participants: participant satisfaction with SFL1 – summarized data.

3. Thinking back to the course now, did you get what you wanted out of the course?

Please elaborate on your answer... (ETMFU)

There were 10 responses – seven “yes”, two “I don’t know” and one “no”.

Positive responses included: they are now doing more work with TNS; making human connections to TNS principles; having more confidence; the networking; quality participants and facilitators; and they got a handle on sustainability:

I really was looking for an intelligent, well-researched, and defensible alternative to the triple bottom line concept. In so many instances, we've seen the financial bottom line win out when the going gets slightly financially tough. The inherent compromises aren't productive or progressive. TNS reframes the context in an elegant, integrated model,

positioning 'sustainability' not as a series of costs, but as a collection of opportunities, and fertile ground for innovation. (VAN2A, p. 9)

Two respondents stated 'yes' but one added that the course was missing the leadership element, and the other was concerned about the challenges of applying the TNS Framework.

The two 'I don't know' responses included a respondent who was totally disillusioned in general with sustainability, and a second who couldn't remember the course very well.

The 'no' respondent was hoping there would be more information on changing attitudes to convince others to become more sustainable, rather than so much detail on the Framework itself, and wanted more practical case studies.

Impacts on participants: participant use of the TNS framework – summarized data.

2. Have you used specific tools from the course or elements of the TNS Framework in the work that you do? If yes – which ones and how? If no – why not? (ETMFU)

Nine of eleven respondents said yes, and the specific tools they used included the following: Five mentioned backcasting; four mentioned sustainability principles; four said they used the PowerPoint slides TNS provided for presentations; four mentioned ABCD; three said that TNS came up in their personal life as a basis for thinking; three mentioned the funnel; two mentioned materials on systems and the ecosystem; one person taught the creation of flexible platforms; and one used the drawing exercise showing the need for common language in sustainability

Two of the yes respondents mentioned concerns with the use of the TNS Framework. One said that TNS is only really for the converted so it is hard to talk about it to the "real world". The other said they wanted to have a conversation about using TNS for a bigger project but had not done it yet.

Of the two respondents who said they had not used the TNS Framework in their work, one said it was because they had no time and the other had changed jobs.

4. Has the course had any impact on your work? – Please expand, elaborate, comment etc. In what ways? (TMFU)

Two of the five respondents said that the course had not directly impacted their work as yet, but both saw themselves using TNS in their future consulting work. One respondent mentioned being involved in self-study around sustainability and TNS being a part of that. One respondent had adapted TNS principles for work with a petroleum-based community. They stated that TNS was too extreme to use without adapting. This participant wanted to do more environmental education with the community using a softened version of TNS. One respondent was a university professor of sustainability and used the TNS Framework in lessons.

5. Has the course had any impact on you personally and/or outside of work? Please expand, elaborate, comment etc. (TMFU)

Two of the three respondents said yes, one noted it was inspiring to know that there were others out there working on sustainability, and one of said that the course was an eye opener and “*lit my fire again*”. The third respondent said there was no impact personally because “*I was already kind of there*”.

6. Have you used any part of the Framework or tools from the course in your work? (TMFU)

There were three responses that mentioned multiple uses of the TNS Framework, including: TNS as a touchstone to go back to thinking about sustainability volunteer work; describing the four systems conditions verbally when discussing sustainability; using ABCD and

backcasting in an environmental planning process for a community; referencing the Framework and working through an example in a university teaching setting.

34. What challenges have you encountered (or do you anticipate encountering) in applying the TNS Framework in your organization? (PPP)

Four of the nine responses related to not having a power position in an organization. There were three mentions of the challenge of getting everyone on board. Two respondents talked about the challenge of translating TNS language (one talked about business language and the other about “non confusing” language). Two respondents said it would be hard to create strategic goals before jumping ahead with an action plan. Other challenges included: becoming comfortable enough with materials to present it; all change is difficult; getting all stakeholders to meetings.

35. What difference do you see this course making to your performance? (PPP)

There were eight responses with multiple answers including: it’s a lens for long term planning; it will help with departmental things like ordering supplies, etc.; it improved facilitation skills (and the need to build more facilitation skills); confidence; improved sustainability presentations; TNS helps with looking at the big picture; better network of people; more awareness of own attitude and action; increased credibility (through using TNS for arguments and ideas); reinforcement.

Impacts on participants – results, discussion and recommendations.

Recommendations: For SFL1 to be a catalyst for more Canadians knowing TNS and using the Framework, **the SFL1 experience should produce a positive story that will encourage participants to tell others about TNS and the course itself.** The impact of SFL1 on participants connects to TNS’s bigger picture purpose of scaling up and out the utilization of the TNS Framework within Canada, as people with a positive story to tell are likely to tell it. To

further influence the awareness and use of the Framework, **TNS should explicitly aim to influence participants' use of the TNS Framework following participation in SFL1.**

In looking at participant answers to questions about the impact of SFL1, the following points are worth noting and building upon in the future:

- Case studies and examples were most often mentioned as highlights of day 1 and day 2
- Networking, working with and learning from the other participants was most mentioned as the best aspect of the course
- The great facilitation was most mentioned when participants were given a chance to add something
- The stories participants said they told others about the course itself varied (e.g. the basics of TNS Framework, TNS applied examples, etc.), as were the positives mentioned (e.g. good framework, enjoyed networking, practical introduction to sustainability etc.), and some of the challenges (e.g. it was for business people, the sustainability principles are confusing and too science heavy etc.).

What failed to emerge was any pattern in people's stories. There is no unifying story of what happened or what was shared. Of course this is to be expected, as everyone experiences things differently, but TNS could consider the leverage opportunities available in aiming to influence the stories people tell, and in turn the impact of the course.

One point I observed and considered was that if one was to ask a TNS advisor or representative about the story they tell about TNS, the answers are likely to involve TNS founder Karl-Henrik Robèrt, some of the things he's done and people/communities/organizations he has

worked with. How could SFL1 produce a unifying story that participants would tell about TNS and SFL1?

Recommendations for improving the stories participants tell about TNS and SFL1 within the course include:

- **Facilitators being more clear in telling their own stories and the specific things they've done with/via TNS.** This is recommended because stories where the facilitators of the course have really made a difference would likely be told again by participants in their circles of influence.
- **Specifically discussing the value of storytelling as a tool** for engaging individuals working with TNS framework.
- **Taking a group photo** and sending a group email with the photo following the course. Individuals will have a reminder of the story that they are now a part of. This group email with the photo could also be an engagement tool for follow-up emails from and to the group, which enhances the sense of community and the story everyone is a part of.

Research question 1.d. The course is called Sustainability for Leaders – is the leadership element addressed properly? How could the leadership element in the course be improved?

Leadership element of SFL1 – summarized data.

30. The course is called Sustainability for Leaders– do you feel the leadership element is adequately addressed in the course? Please comment... (PPP)

There were 13 participant responses that included multiple ideas. Most respondents wanted leadership to be addressed more in the course: six people mentioned confusion about the title and leadership's place in the course, and asked for definitions of the terms leadership, sustainability leader, and sustainability champion. Three people mentioned that leadership was

not defined in the course, and an interesting quote prompted by this question was “*in this case, the word leadership is way fuzzier than the word sustainability*” (VANSTORY, P11). The question led three people to talk about personal leadership and leadership by example. Two people said they expected to be taught more about how to lead with TNS in an organizational setting. One person simply said that the course trains you in TNS concepts, not leadership.

Three respondents felt the emphasis on leadership in SFL1 was adequate; two noted that leadership was not overtly addressed, but if you bought into the TNS Framework, you would be leading discussions on sustainability. One mentioned that leadership training was a separate course, so not too much time should be spent on it.

27. The course is called Sustainability for Leaders, but there is not an overt attention to the theme of leadership – do you feel the leadership element is properly addressed in the course?

(FI)

Three facilitators responded with multiple ideas. Two facilitators stated that leadership would be addressed more in SFL2, and one stated that the title was more for marketing and that the course itself was about the TNS Framework.

Facilitator ideas for integrating leadership more into SFL1 included: more context around the TNS perspective on leadership can be provided (leaders can come from all levels of an organization), and re-emphasized through the Bob Willard material; an acknowledgement that it would be good to spend time on the leadership aspects that participants will face when they go back to their organizations; more space could be given to asking individuals how they will lead sustainability within their own organizations; and the dancing guy (YouTube) video (shown in Halifax) was helpful.

Leadership element of SFL1 – results, discussion and recommendations.

Recommendation: Increase the overt attention to leadership within SFL1.

Participants are generally expecting more of a leadership element out of a course called *Sustainability for Leaders* and 10 of 13 participants felt it was not given enough overt attention in the SFL1 pilots. Significant quotes from participants around the leadership aspect of the course included:

- I've been exposed to various encounters of TNS; I expected... more on leadership... (the course) was a review of the Framework. It didn't go into how you position yourself in your organization to lead the stuff. (CGY3, p 3/4)
- Depending on what level of leader they want to be it could be misleading so maybe you could say... we are defining leaders as this... (VAN3, p. 11)
- What leaders do - they have to set an example and so that aspect of leadership could have been discussed more I think (VAN6A, p. 7)
- I don't think they had very much on leadership or how to be a leader. I felt I was learning about a framework... I think it might be interesting for the future, but also a little bit more integration in (SFL1) because one of my big questions... was... how do I get others to follow that (TNS Framework) idea? (OTT1, p. 15)

In my observations, I found leadership touched on in the following ways in the current version of SFL1:

- There is a mention of leadership in the Welcome text on page 2 of the workbook (but it is not highlighted or discussed)
- In Calgary (and subsequent courses) a particular leadership definition comes up in the midst of the PowerPoint set on the morning of day one, but not in a broad or overt way, and not in relation to the course title

- In Vancouver, Pong said that TNS was about leadership, working with organizations that can be examples, and working with people like YOU (the people in the room)
- In Halifax the “Leadership Lessons from Dancing Guy” video was introduced ad hoc and shown as a link to leadership, but more as a humorous aside (see recommendations below for leveraging this video and idea)

I also discussed the future of the leadership element in SFL1 courses with the TNS USA training director who stated that:

As we’re starting internationally, to design additional courses to add on to, I feel pretty strongly that leadership development should be part of it all the way through... there needs to be more attention to the leadership challenges and training in the Level 1 course, and so we need to figure out a way to, even if it means sacrificing some other components, to allow more time for people to really understand - what are my leverage points and how I would be a more effective leader? (TNSUSA, p. 7).

The training director developed and ran comparable SFL1 courses for TNS USA in 2009 and 2010 so this endorsement for additional attention to leadership in SFL1 courses holds merit for TNS Canada.

Recommendation: TNS should keep the *Sustainability For Leaders* title and define leadership within the context of the course (and link that definition to the term “sustainability champion”). That definition would be used to explicitly integrate and expand on leadership within the course. Participant opinions about the course title and its definition included:

- I liked the course title but my sense is how they (facilitators) were actually interpreting as they delivered was that leaders are champions (CGY4, p. 7)

- I remember now that leadership is not defined... all this time talking about sustainability but we don't really talk about what leadership is... in Sweden we spent a couple of workshops just talking about what leadership meant and leadership in this case... is a way fuzzier word than sustainability... it's a really good point that they don't address that enough (VANSTORY, p. 11)
- Leadership is more about leading by example or affecting change... there's a bit of that that we were missing as far as the leadership goes. If the goal of the course was to make it so that you could teach others the principles of TNS I think that's good but then the title should be 'Sustainability for Facilitators' or 'Sustainability for ____', I don't know, whatever else. (OTT3, p. 10)

Based on interview data and observation, it is clear that leadership in the context of SFL is not defined. As it stands, the statement below (which appears as a paragraph in the middle of the welcome page in the *Sustainability for Leaders* workbook) is the only mention of what a 'sustainability leader' is in the context of this course:

Hundreds of organizations and communities around the world have used the TNS Framework to support their desire to take a leadership position on sustainability, thereby acting as role models to inspire their peers to do the same. By showing up here today, you have identified yourselves as leaders in our collective journey towards sustainability. (p. 2)

This statement is not brought up verbally in the course, and would only have been read if participants took the time to read the welcome page, rather than settling into the room and networking with others (which is what most of them did). Currently, the first task for participants on day one of the course is to answer the question: "What is your greatest challenge and greatest

opportunity in your role as a sustainability leader?” This topic is then used for conversation in a networking exercise. Hence, it would be best to define leadership in this context *before* beginning the course and having discussions based upon it. The TNS definition of leadership in the context of SFL1 could include:

- Understanding and knowing how to work with the TNS Framework
- Mention of the term/idea “sustainability champion” and how that relates to or is the same as the term/idea “sustainability leader”
- Touch on the idea that this type of sustainability leadership can occur in a home, community, organizational, or other setting, and can come from any official or unofficial “position”
- Words TNS staff feel will best connect with participants on this topic

Recommendations: Leadership should be integrated to the course while adding value, but without using too much ‘class time’. Here I suggest that this be accomplished by touching on leadership at five **recommended leadership integration points** in the course, which are described below, and work off of the current course design (i.e. they could be integrated fairly seamlessly). Each recommendation is accompanied by a relevant quote from an SFL1 facilitator.

Recommended leadership integration #1: Talk about definitions of leadership and introduce the TNS definition of leadership for this course (this idea was developed in the recommendation above) **at the very start of SFL1 as the first topic.** Putting the course title and expectations around leadership into context right away will make it clear to everyone how the title of the course relates to what they are about to experience. This leadership integration to SFL1 could happen at the beginning of the course, starting with a brief open discussion where a

facilitator could say: “this is Sustainability for Leaders, we would like to hear your ideas about what leadership is...” After hearing what a few people say and giving credit to their thoughts, the facilitator could mention/show a few definitions of leadership (from acknowledged leadership experts). Next, the facilitator could give the TNS definition of leadership in the context of SFL1. Ideally that definition would be in the workbook, and participants could be directed to highlight or circle it. Penultimately, this quote from TNS founder Dr. Karl-Henrik Robèrt, (which is currently featured at the bottom of the workbook welcome page) could be introduced and highlighted as this introduction of the leadership aspect of the course finishes up: “The question of reaching sustainability is not about if we will have enough energy, food, or other tangible resources... the question is: Will there be enough leaders in time?” Finally, the first task in the SFL1 workbook (where participants write and talk to each other about their personal challenges as a sustainability leader) could commence.

It goes back to your question about the introduction and context... one place we can provide a little more context is around our perspective on leadership which might not be the same exactly the same as everyone in the room... when we talk about leaders we are talking about leaders from all levels of an organization or community, not just those who are in traditional leadership positions... I think it would be good to spend a little more time upfront. FAC3, p. 13/14

Recommended leadership integration #2: Give more attention and class time to the 7 Practices of Sustainability Change Leaders page (adapted from Bob Willard’s Sustainability Champions Guidebook (see Appendix F) which was touched on (with varying time and attention given) near the end of Day 2 in the pilot versions of the course. Introduce the materials on the morning of Day 1, after the section called Emerging Sustainability Challenges and Opportunities

is finished but before any specific work is done on TNS Framework or TNS Sustainability principles. Facilitators could introduce the materials, then participants could read and highlight the single page before having one-on-one reflection conversations with a partner. This section could conclude with a facilitator tying a couple of Bob Willard's points to the TNS Framework, which would be next in the current flow of the course agenda (see Appendix G for suggestions tying Bob Willard's points to TNS principles and participant quotes).

This would provide three benefits:

1. Touching back on leadership again here would re-enforce the course introduction;
2. The Willard points are all understandable and actionable; and can all relate to the use of TNS tools and the Framework. These links could be highlighted, giving people more incentive to understand the rigors of the TNS Framework (which is being taught next).
3. This introduction to Willard's leadership material would make it more likely to resonate and stick when returned to on Day Two.

Then to come back to (leadership)... at the end with the Bob Willard material, it would probably be good to spend a little more time on the leadership aspects that the individuals, the champions or leaders who take the course are going to face when they go back to their organizations, because as leaders we just set them up for success to navigate change and to communicate well within the organizations. FAC3, p.13/14

Recommended leadership integration #3: Re-enforce leadership while adding a touch of humor with the three minute "First Follower: Leadership Lessons from the Dancing Guy" YouTube clip. At the start of the afternoon on Day Two, facilitators could show the clip then follow with a brief facilitated discussion of how embracing and working with TNS and

sustainability in general in an organization or community often implies being the second leader. When this clip was introduced to SFL1 for the first time in Halifax by a facilitator in an *ad hoc* manner, it was principally to bring humor and have a general but non-specific link to the content. I reflected that the “star” of the video (doing the strange dance), could be a fun analogy for the four sustainability principles of TNS, and that the people in the video who join him are the critical “first followers”, analogous to individuals aiming to spread understanding of sustainability and TNS. The direct link to leadership is described in the audio from the clip: “Being a first follower is an under-appreciated form of leadership. The first follower transforms a lone nut into a leader. If the leader is the flint, the first follower is the spark that makes the fire”. The clip can be used to start a conversation and can add a bit of self-deprecating humour if framed correctly (TNS is the lone nut with their “confusing principles” and the people in the room being the first followers who spark the fire). By this point in the course people understand that the principles are important but also a challenge to communicate to people. This analogy can help them understand their role as sustainability leaders including supporting TNS and the principles, despite the challenges involved.

I think that (dancing guy) video was helpful... probably a good addition to the workshop to bring it back to the fact that this is about creating leadership (FAC4, p. 17)

Recommended leadership integration #4: Adjust the current workshop-closing question (about participants’ three planned action steps coming out of the course) in the workbook to include the leadership definition that has been established for the course. The instructions could read: “Based on our definition of leadership, and everything we have discussed in the last two days, please identify your top three next action steps to further engage yourself and others in action towards sustainability.”

Possibly at the end we give more time and space to discussion about ... (the) leadership element... What can you do now... in your own organization? Where are gaps in (your) organization and how do you plan on bridging those gaps? That would help tie back more to the leadership aspect of the course. (FAC4, p. 17)

Recommended leadership integration #5: Ensure that participants know that leadership will be a key element of SFL2. With many topics (including leadership) being too broad to cover in the two days, acknowledgement of topics getting further coverage in SFL2 both promotes the second course, and satisfies people who want more in a particular area. This will also help participants understand that they need the grounding, tools and skills of the TNS Framework being developed in SFL1 to enhance and support their evolution as a sustainability leader. Specifically, facilitators could mention the more advanced leadership focus of SFL2 whenever leadership is being discussed as part of SFL1 (i.e. in the four leadership integration points above). Additionally, participant questions relating to a higher level or more intensive leadership topics (e.g. governance, long-term engagement, managing setbacks etc.), can be acknowledged and swiftly addressed, with facilitators explaining that SFL2 is the place for more focused attention in that area.

I think (SFL1) does a good job at setting them up (for leadership), but I think there is something more that we can do and as we develop (SFL2) and additional modules, we would... find ways of further refining that. (FAC3, p. 13/14)

Research question 2. What are some recommendations for the development of the SFL2 course, based on SFL1 participant and facilitator feedback, my own ideas, and best practices in adult education?

SLF2 Ideas

Summarized data.

As you may know, TNS is developing a Level Two of the Sustainability for Leaders course – what would you like to see in a next level of training? What would you be interested in learning or doing? (PPP)

There were 12 responses with multiple answers. Three responses requested looking deeper at the leadership aspect; three asked for more details on ABCD, including concrete step by step examples and challenges; and two requested training in facilitation skills and techniques for TNS.

Other desires for learning were: more discussion about Bob Willard’s materials related to translating TNS and sustainability into specific business contexts; experiencing sustainability problem-solving using the TNS Framework; translating TNS into ‘regular’ language; connections with eco-feminism, the spiritual, and the scientific; how to keep the sustainability process moving and keep people engaged in the long term; and what TNS looks like in an organization that has been using it for five or 10 years.

Desires around continued learning included one person who was not interested in SFL2, one person who wanted to go all the way to the TNS-focused masters program in Sweden, and one would like to see a more formalized sequence of TNS workshops with prerequisite courses.

7. Would you have liked more of an emphasis on developing teaching and facilitation skills as part of the course? (TMFU)

There were four responses. Three were interested in facilitation skills, but two of the three felt that there would not be enough time in the two-day course and one person was not interested in facilitation skills.

13 Are you interested in more training with TNS? If so, what else would you be interesting in learning? (TMFU)

Five participants responded, including: a fan of TNS who was interested in whatever they do; a person who wanted to take a TNS community planning course (six month offering); a person who wanted to learn to teach TNS; one who wanted to know more about the outcomes that have been achieved to date with TNS, and one who did not want any more TNS training.

32. If you were part of the design team for a Level Two of the Sustainability for Leaders course – what would you like to see in that course? (FI)

Five facilitators responded with multiple ideas. Three facilitators mentioned doing more with human needs (e.g. the work of Max Neef). Three mentioned the process of organizational change (e.g. the Bob Willard and Bob Dopplet materials), and two mentioned strategic lifecycle assessment.

33. How would you suggest the course be structured? In person? Online? A combination? Networking cohorts together? (FI)

Among the four facilitator responses were ideas to have advance interviews before the course, and to do as much in person as possible. One facilitator said SFL2 should be more practical than SFL1, with people doing real work related to their own organization, sharing those experiences for debrief, and then having coaching. Two facilitators suggested a five-month course with pre-work, two two-day workshops, some online engagement, and a wrap-up.

Results, discussion and recommendations.

Ideas generated for SFL2 by participants, facilitators and myself were wide ranging, but an overall theme extracted from the process relates to Knowles' (cited in Merriam, Caffarella, & Baumgartner, 2007) ideas on adult learning being about immediacy of application, and TNS founder Karl-Henrik Robert's (2002) statement about TNS being built on people learning how to run the process rather than just supporting it.

Recommendation: SFL2 should focus on the application of TNS. Specific areas explored here include: personal sustainability; leadership, organizational change and maintaining momentum; preparing for "typical" TNS situations; business skills not exclusive to TNS but relevant to working with the TNS Framework; building individual capacity around, and being more rigorous with, the TNS Framework; TNS brand; and action learning projects and/or live application

Personal Sustainability

Recommendation: Make the challenges of maintaining personal sustainability a specific topic in SFL2. TNS Board member and sustainability consultant/author Bob Willard writes about sustainability leaders needing to 'Get Credible, Stay Credible'. Walking the talk of sustainability can sometimes be challenging. A participant suggested that SFL2 could address this:

If you're touting sustainability you have to, at some level, be practicing it in your everyday life and leaders do that – that's a hard thing to talk about, our own contradictions, because you don't want people to feel guilty or point fingers... I'm definitely not perfect, I probably drive more than I should and blah, blah, blah... it would be interesting to have a conversation or a piece about the contradictions that sustainability leaders live through... on a personal level – how do you handle that? (VAN6A, p. 7).

Leadership, Organizational Change and Maintaining Momentum

Recommendation: make Bob Willard’s book *The Sustainability Champions Guidebook*, a course text for SFL2 and use its simple, well-researched format to introduce and guide the topic of organizational change towards sustainability. Ideas about sustainability leadership from Willard are introduced in SFL1, so this would build well on the previous learning. Organizational change is at the core of what TNS does. SFL1 provides the tools and framework for change, but SFL2 could get deeper into how to work with organizations as a sustainability leader. One facilitator said: “one of the things that I found through most of the workshops is that the process of organizational change is something that is of interest to a lot of participants” (FAC3, p. 14).

Recommendation: In terms of leadership, SFL2 could expand on the suggestions for leadership in SFL1 (listed above) and possibly introduce a mentorship program, where SFL2 participants mentor an SFL1 participant.

Preparing for ‘Typical’ TNS Situations

SFL2 participants will be advanced practitioners of sustainability, and therefore should be trained in what to expect when presenting the TNS Framework to diverse audiences.

Recommendation: SFL2 should leverage the myriad TNS resources and facilitator experience by focusing on:

- Learning and using TNS communication tools such as:
 - The Yes, and Technique
 - The Asking Advice Attitude
- Preparing for handling typical questions faced by TNS advisors as presenters of the material

- Working on TNS “elevator speeches”
- Discussing how to use “common language” to describe the four sustainability principles
- Nuances and subtleties of facilitating and working with the Framework (ideas from the veterans)

Business Skills not Exclusive to TNS but Relevant to Working with the TNS Framework

Recommendation: After participants have understood the TNS basics through SFL1, SFL2 can expand into marrying the TNS Framework with other relevant tools and processes. Facilitator thoughts on this included:

There may be stuff around business development, proposal writing, project scoping... , setting your system boundaries in any particular project and scope creep stuff. (FAC2A, p. 17)

Another component for Level 2 courses is getting into the similarities and differences of the Natural Step Framework as compared to other tools, concepts, resources that are out there. This is something we talked about putting in the Level 1 course but decided to leave for Level 2. (FAC3, p. 14)

Building Individual Capacity Around, and Being More Rigorous with, the TNS Framework

Recommendation: go deeper into TNS Framework in SFL2. In reflecting on their desires for SFL2, each of the facilitators interviewed expressed sincere interest in taking the TNS Framework deeper. SFL1 allows them to present the Framework and reasoning behind it, but does not allow them to expand on how important the specifics of the Framework and the science behind it needs to be in order for TNS to be effective in creating change. Some of those thoughts are reflected in the quotes below:

Going deeper into the Framework again is a reinforcing element so more practice with those sustainability principles (FAC4, p. 18/19)

When we say Level 2... we really have to get back to what we are trying to do with the courses and a lot of it centres around building capacity in people to apply the Framework then to use the Framework in their work... we need better understanding of how people intend to do that, what they want to do with the Framework so that we can further build capacity in those areas. (FAC3, p. 14)

How we [TNS] take information from that and turn it into a workshop and then a road map for working towards sustainability (FAC1B, p. 7)

TNS Brand

Recommendation: Focus on the TNS brand in SFL2, based on the fact that by the time individuals have signed up for SFL2, they have invested a significant amount of time and money into TNS and therefore would essentially be discussing their investment, which should be of interest to them. The course could include a discussion of the TNS brand and what it means right now, what it could mean in the future (the evolving TNS brand) and how it can be leveraged to initiate conversations and initiatives. Another possible topic could be the distinctions between TNS Canada and the other TNS organizations in the world (explain “how it works”). Finally there could be a piece on speaking to TNS principles when interacting with the media, which would enhance the brand, and in turn, the value for everyone.

Action Learning-Projects and/or Live Application

Recommendation: Integrate action-learning projects and/or live application into SFL2. The idea for action learning projects and/or live application builds on a participant idea from the Vancouver course, which was to have a real client come in and give their organization

as an example for SFL2 participants to apply the TNS Framework as a project team.

Organizations who volunteered would get free sustainability consulting, TNS would expand its reach, and participants would get valuable experience. SFL2 facilitators would coach participants and through this process educate and facilitate discussions and action within the volunteer organizations. These projects could also be summarized and described to SFL1 participants to increase the links between the programs, and to show people what they get to do next if they keep working with the SFL1 courses.

Another option of this type, suggested by a facilitator, relates to individuals working within their own organizations and “coming out of the course with a tangible outcome, either an assessment piece or engagement strategy or plan of some sort”. (FAC1A, p. 12) More specifically:

Organizational assessment (people from the course doing interviews with their peers in their organizations) around governance and performance management, which is very necessary in really doing this process in organizations - engaging people in HR, engaging people around the message – these things are important to talk about, but not necessarily directly related to the Framework, more part of the organizational change management process stuff. (FAC1A, p. 12)

CONCLUSIONS

Sustainability for Leaders – Level One course is a well designed, effectively executed, engagingly facilitated course. It succeeds in increasing the familiarity of Canadian sustainability practitioners and potential sustainability leaders with TNS concepts, and helps them understand the organization and why it exists. The course is not broken, and does not need to be fixed. However, as a learning organization, TNS is constantly seeking to improve as it evolves. This utilization-focused evaluation uncovered many of the positives in the newly designed SFL1, but also found areas for improvement. The suggestions contained within this thesis will hopefully be given consideration by TNS representatives, and help further improve all future TNS Sustainability for Leaders courses.

The results and discussion section above includes recommendations and improvements to various parts of the SFL1 course. Recommendations include: how to better market and promote the course; improvements of the materials for the course itself; detailed feedback on impactful lessons and topics; suggestions for leveraging a participant's interest in networking; and ideas for the course follow-up. There is a section that gives detailed feedback for course facilitators. There is also discussion of the overall impact of the course on participants, and thoughts about improving that impact. During the research, participants, facilitators and I highlighted the topic of leadership (as the course is named Sustainability for Leaders, and there is not an overt focus on leadership). The leadership aspect of the course is addressed, and recommendations are made to clarify and improve the course in this area, without having to drastically alter the course structure or content. Finally, there is a report on knowledge generated in relation to the Sustainability for Leaders Level Two course, which was in development by TNS during the research period. All of the information, recommendations and conclusions were generated with

TNS in mind. This utilization-focused evaluation is intended to be a living document for an active learning organization (TNS) to use to improve its programming, and in turn assist in the creation of a more sustainable society.

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APPENDICES

Appendix A: The System Conditions for Sustainability¹

In a sustainable society, nature is not subject to systematically increasing...



...concentrations of substances extracted from the Earth's crust,



...concentrations of substances produced by society,



...degradation by physical means,



and, in that society - people are not subject to conditions that systematically undermine their capacity to meet their needs.

¹ From The Natural Step Canada (2011c). The four systems conditions. Retrieved September 20, 2011 from <http://www.thenaturalstep.org/the-system-conditions>. Used under a Creative Commons Attribution-ShareAlike license: <http://creativecommons.org/licenses/by-sa/2.5/ca/>

Appendix B: Questions for Participants – Post Program

TNS, Sustainability for Leaders – Level One course

Purpose for conducting interview:

- To document the participant experience of TNS, Sustainability for Leaders – Level One course
- To understand participants thoughts, feelings, ideas and judgments about the course materials and facilitation
- Determine strengths to continue and areas to improve for the course
- To explore what participants would like or expect from TNS, Sustainability for Leaders – Level Two course

Methods and timing:

- A minimum of four participants will be interviewed following each delivery of the course
- An effort will be made to interview at least one or two of the participants in person right after the course
- All other interviews will be conducted by phone within a week of the course finishing
- All interviews will be recorded on a USB microphone, using Amadeus Pro software on my Macbook laptop computer.
- Consent to participate will be acquired from each respondent
- Permission to record will be requested at the beginning of each interview

Respondents:

- The evaluation will be described to the course participants as part of the opening of the course. It will be indicated that they will be asked to participate if they are willing and able.
- A sheet will be distributed to participants during the course, asking for contact information (phone number and email) along with a request for them to indicate if they are willing and able to participate in any of the following: A post-course interview in person; a post-course interview by phone; a short e-mail survey 3 months following the course; an interview by phone 3 months following the course.
- Background information (Full name, organization and location) will be available from course records and will be confirmed in interviews.

In advance

- Let respondents know that the interviews will take between 30 and 45 minutes, depending on how much time they can spare
- Request that respondents have the course workbook handy for reference

Interview Guide

(Aim to follow particulars mentioned by respondents with relevant probing questions to explore the comments further and deepen their responses)

Theme 1 – Comfort and Basic Information:

1. Ensure comfort – is this still a good time for the interview? Is there anything I need to know etc. If in person, offer refreshments if possible.
2. Briefly describe my project and it's purpose (Evaluation of the course that they took to improve it for future deliveries and as my submission for my masters thesis)
3. What is your name? (but assure them that their names will not be used in any formal reports)
4. What organization or community do you represent?

Theme 2 – Promotion / Communications

5. How did you first hear about TNS, Sustainability for Leaders – Level One course? (probes): Was it online? Through a colleague or friend?
6. What do you think would be the best way for others to learn about future deliveries of this course?

Theme 3 – Motivation / Initiation

7. Tell me a bit about why you decided to attend this course in the first place? – What was interesting or motivating to you about it? (probes): Were you inspired or encouraged by another person? Was there an event or circumstances that made a difference? Is this something that has become relevant in your work?

Theme 4 – Objectives and goals / Expectations

8. In your own words, what do you feel TNS's objectives and goals were for this course?
9. What expectations did you have coming into this course?

Theme 5 – Pre-course

10. This course started with a welcome package – any comments? Did you feel well briefed as to what you were about to experience? Was anything missing?
11. You also received a link to the online Sustainability 101 course – Did you open the course? Did you complete the course? Do you have any comments about the online course?
12. Is there anything else you would have wanted in advance of the course? (probes): Further information? Contact person? Testimonials from past participants? Other?

Theme 6 – Materials

Now I'd like to ask you some questions about the course materials and workbook – do you have your workbook handy?

13. Looking at the workbook (give them time to look through): Any comments about the setup or the workbook in general? Does anything stand out to you as a highlight or as being particularly effective?
14. Still looking through the workbook (give them more time to look through) – was there anything that you felt was missing? Was there anything in there that you felt was not useful or redundant or just did not work?
15. How do you envision using this workbook in the future?
16. Were the presentation slides (PowerPoint) informative/useful? Any suggestions?

Theme 7 – Course Agenda / Tasks and Exercises

I'd now like to ask you about the course agenda, tasks and exercises. We will go through the two days and I will mention some of the main tasks and exercises that we did. Can you please follow along in your workbook and mention if any particular tasks or exercises stood out as your favorites and also mention those that you felt needed change or improvement.

Lets start with the beginning of the course:

17. Thinking back to when you arrived on (whatever day) - Do you feel like you had a good understanding of TNS's goals and objectives were?
18. Do you feel like you had a good understanding of what was going to happen over the next couple of days?
19. Is there anything else you would have liked included in the opening?

On day one we did the following tasks and exercises:

- A. Task #3: The Natural Step – Who we are and what do we do?
- B. Task #4: Stories from the Field 1 (Landmark Builders)
- C. Task # 5: Emerging Sustainability Challenges and Opportunities (Discussion of Innovation, the funnel, the drawing your organizations funnel exercise and more)
- D. Task #6: Backcasting from Success
- E. The drawing in partners exercise to establish the need for common language around sustainability
- F. Task #7: Exploring Sustainability Principles (the four principles)
- G. Task #8: The ABCD Planning Methodology
- H. Task #9: Stories from the Field 2 (Williams Lake)
- I. Task #10: Drafting Strategic goals for the Future (working in groups – what does your organization look like in the Future etc?)

20. What stood out to you as a highlight or an important activity on day one? Why?

21. What would you change about day one if you could? Why?

On day two we did the following tasks and exercises:

- A. Task #13: Presentations on the TNS Core Concepts (specific question on this later)

- B. Task #14: Identifying Key Sustainability Challenges (working in groups identifying the ways your chosen organizations were not in line with sustainability principles)
- C. Task #15: Refining Strategic Goals (going deeper with the goals your group came up with on day one)
- D. Task #16: Force Field Analysis (identifying the things that would help or hinder your organizations moves towards sustainability)
- E. Task #17: Action Planning (prioritizing action based on 3 strategic backcasting questions and setting specific targets and actions around sustainability goals)
- F. Task #18: Stories from the Field 3 (Rocky Mountain Flatbread)

22. What stood out to you as a highlight or important activity on day two? Why?

23. What would you change about day two if you could? Why?

24. Please comment on your experience in your individual 20-minute presentation at the beginning of day 2?

Theme 8 – Facilitators

25. Now turning your attention to the course facilitators – As a team did they:

- A. Clearly explain objectives
- B. Sustain the interest and participation of the group
- C. Have their teaching segments organized effectively
- D. Give clear directions for tasks and exercises
- E. Clarify and answer questions from participants

(Ask “How?” and “In what way?” where appropriate)

26. Do you have any particular strengths or specifics to mention about (name each facilitator individually)?

27. Do you have any areas to improve for (name each facilitator individually)?

28. Do you feel you were able to personally participate effectively in the course? (Yes or No) Please comment...

Theme 9 – Participants

29. There was a diverse mix of people in the room, from different industries, organization and communities – how did you feel about that? How do you think it influenced the course and your experience?

Theme 10 – Leadership

30. I’d like to ask you about the course theme and title now: The course is called Sustainability for Leaders– do you feel the leadership element is adequately addressed in the course? Please comment...

Note: (one TNS representative suggested the name allows the course to be a ‘catch all’ for multiple sectors, one participant interviewed was disappointed in a lack of attention to the theme)

Theme 11 – Overall highlights and improvement areas of the course

I appreciate your time so far; we only have a few questions to go!

31. Thinking about the course as a whole – what is the best aspect of the course? What did you find most interesting or most useful? Why?
32. Can you name an area of improvement you would like to see in the course?
33. Is there anything else that we have not covered that you would like to mention about the course?

Theme 12 – Learning and Transfer

34. What challenges have you encountered (or do you anticipate encountering) in applying TNS framework in your organization?
35. What difference do you see this course making to your performance?

Theme 13 – Looking ahead and Sustainability for Leaders Level Two

36. Is there any type of support that you would like or expect from TNS moving forward out of this course? Or “what could that support look like?” (probes): There are specific types of support that can include - More online training? Case studies? A resource or contact person within TNS? Coaching phone calls? Networking opportunities? Online resources? Case study examples?
37. Would you recommend this course to a colleague now? Why?
38. As you may know, TNS is developing a Level Two of the Sustainability for Leaders course – what would you like to see in a next level of training? (probe): What would you be interested in learning or doing?

Theme 14 – Closing

39. Is there anything else you would like to say about your experience?
40. Is there anything else you would like to ask me?

Thank you so much for the time and thoughtful answers you have given today!!! The information you have provided will greatly assist in improving TNS training in the future!

NOTE – Questions on use of materials, application to work and real life, impact of the course and would you recommend the course will be among the questions asked in the follow-up interviews 3 months after the course.

Appendix C: Questions for Facilitators – Post Program

TNS, Sustainability for Leaders – Level One course

Purpose for conducting interview:

- To understand the facilitator experience of TNS, Sustainability for Leaders – Level One course
- To understand/document/access facilitators thoughts, feelings, ideas and judgments about the course materials and facilitation
- Determine strengths to continue and areas to improve for the course
- To explore facilitators vision of TNS, Sustainability for Leaders – Level Two course

Methods and timing:

- Both facilitators will be interviewed following each delivery of the course
- An effort will be made to interview the facilitators in person right after the course
- If in person is not possible, interviews will be conducted by phone within a week of the course finishing
- All interviews will be recorded on a USB microphone, using Amadeus Pro software on my Macbook laptop computer.
- Consent to participate will be acquired from each respondent
- Permission to record will be requested at the beginning of each interview

Respondents:

- The evaluation will be described to the course facilitators in advance of the course
- Facilitators will be encouraged to contribute ideas to the interview process

In advance

- Let respondents know that the interviews will take between 30 and 45 minutes, depending on how much time they can spare
- Request that respondents have the course workbook handy for reference
- Try to have a copy of the pre-course online survey ready to show them

Interview Guide

(Aim to follow particulars mentioned by respondents with relevant probing questions to explore the comments further and deepen their responses)

Theme 1 – Course objectives and goals

I would like to start by talking about the beginning of the course development...

2. In your own words - What was the origin of the course – why it was developed?
3. How was the need for the program determined?
4. In you own words, what are the main goals for the Sustainability for Leaders course
5. Did you have any personal goals going into this session? What were they? Were they met?

6. Do you have any requirements for this evaluation process I am conducting?

Theme 2 – Pre-course preparation

7. Thinking about your time in advance of Sustainability for Leaders – Level One, what are the things you did to prepare for facilitating and leading this course?
8. Is there anything you would do differently, or any unmet needs you found you had, in advance of facilitating this course again?
9. Were the pre-course surveys the participants filled out online useful? In what way?
10. Are there any questions you would suggest adding to that survey?

Theme 3 – Materials

Now I'd like to ask you some questions about the course materials and workbook – do you have your workbook handy?

11. Looking at the workbook (give them time to look through): Any comments about the setup or the workbook in general? Does anything stand out to you as a highlight or as being particularly effective?
12. Still looking through the workbook (give them more time to look through) – was there anything that you felt was missing? Was there anything in there that you felt was not useful or redundant or just did not work?
13. How do you envision participants using this workbook in the future?
14. Were the presentation slides (PowerPoint) informative/useful? Any suggestions to change the slides? How? Why?.
15. What concepts/questions/reminders etc. do you think might be good to have on display in the room (whiteboard or flipchart paper) during the entire course at all times (to assist visual learners)?

Theme 4 – Course Agenda / Tasks and Exercises

I'd now like to ask you about the course agenda, tasks and exercises. We will go through the two days and I will mention some of the main tasks and exercises that we did. Can you please follow along in your workbook and mention if any particular tasks or exercises stood out as your favorites and also mention those that you felt needed change or improvement.

16. Thinking back to the beginning of the course on (whatever day) - Do you feel like participants had a good understanding of TNS's goals and objectives were? Do you feel like they had a good understanding of what was going to happen over the next couple of days?
17. Is there anything else you would have liked included in the opening?

On day one we did the following tasks and exercises (will change for different deliveries):

- I. Task #3: The Natural Step – Who we are and what do we do?
- J. Task #4: Stories from the Field 1 (Landmark Builders)

- K. Task # 5: Emerging Sustainability Challenges and Opportunities (Discussion of Innovation, the funnel, the drawing your organizations funnel exercise and more)
- L. Task #6: Backcasting from Success
- M. The drawing in partners exercise to establish the need for common language around sustainability
- N. Task #7: Exploring Sustainability Principles (the four principles)
- O. Task #8: The ABCD Planning Methodology
- P. Task #9: Stories from the Field 2 (Williams Lake)
- Q. Task #10: Drafting Strategic goals for the Future (working in groups – what does your organization look like in the Future etc?)

18. What stood out to you as a highlight or important activity on day one? Why?

19. What would you change about day one if you could? Why?

On day two we did the following tasks and exercises (will change for different deliveries):

- G. Task #13: Presentations on the TNS Core Concepts (specific question on this later)
- H. Task #14: Identifying Key Sustainability Challenges (working in groups identifying the ways your chosen organizations were not in line with sustainability principles)
- I. Task #15: Refining Strategic Goals (going deeper with the goals your group came up with on day one)
- J. Task #16: Force Field Analysis (identifying the things that would help or hinder your organizations moves towards sustainability)
- K. Task #17: Action Planning (prioritizing action based on 3 strategic backcasting questions and setting specific targets and actions around sustainability goals)
- L. Task #18: Stories from the Field 3 (Rocky Mountain Flatbread)

20. What stood out to you as a highlight or important activity on day two? Why?

21. What would you change about day two if you could? Why?

22. Please comment on your impression of the individual 20-minute presentation at the beginning of day 2?

23. Is there anything in the agenda that you would change, now looking back at it? (probes if necessary): Visuals? Reflection time for participants? Activity or physical time? Food? Feedback from participants? Different focus?

Theme 5 – Facilitators

24. Reflecting on your own performance – can you name some things you felt you did well and some things you felt you could improve?

25. Reflecting on the other facilitator (and I will ask them the same question about you) – can you name some things you felt that person did well and some things you felt that person could improve?

Theme 6 – Participants

There was a mix of participants in the room in terms of their organizational background, experience with TNS framework and interests in terms of sustainability. This differs from the usual TNS scenario of working with one community, organization or industry.

26. What are your thoughts on dealing with that within the course? (probes): How did this diversity affect things? Did it influence the way you taught the course? How? How do you think the diversity influenced the experience for participants?
27. Is there anything that should be done differently to address and work with this diversity?

Theme 7 – Leadership

28. The course is called Sustainability for Leaders but there is not an overt attention to the theme of leadership – do you feel the leadership element is properly addressed in the course?

Theme 8 – Overall highlights and improvement areas

29. Thinking about the course overall – were there any particular highlights that come to mind for you – things that went really well overall?
30. Again thinking about the course overall – was there anything that has not been mentioned that you felt did not work or could be changed or improved?
31. Is there anything else you would like to say about the course?

Theme 9 – Looking ahead and Sustainability for Leaders Level Two

I'd like to ask you about post course follow up and support now....

32. What types of support do you feel would be most useful for participants to effectively implement the course materials? (probes if needed): More online training? Case studies? A resource or contact person within TNS? Coaching phone calls? Networking opportunities? Online resources? Case study examples?

As I'm sure you know, TNS is planning to develop a Level Two of this course: but the content and details of delivery are not set.

33. If you were part of the design team for a Level Two of the Sustainability for Leaders course – what would you like to see in that course? (probe): what would be important elements to include
34. How would you suggest the course be structured? (probe): in person? online? A combination? Networking cohorts together?

Theme 10 – Closing

35. Is there anything else you would like to say about your experience?
36. Is there anything else you would like to ask me?

Thank you so much for the time and thoughtful answers you have given today!!! The information you have provided will greatly assist in improving TNS training in the future!

Appendix D: Questions for Participants – 3-Month Follow-up

TNS, Sustainability for Leaders – Level One course

Purpose for conducting interview:

- To hear the ‘stories’ that participants are telling about their experience with the course, and about TNS in general
- To understand and document the impacts of the course on the lives of participants and their organizations
- To determine which tools, concepts and ideas from the course have been put into practice in the three months since the course
- To explore what participants would like or expect from TNS, Sustainability for Leaders – Level Two course

Interview Guide

(Aim to follow particulars mentioned by respondents with relevant probing questions to explore the comments further and deepen their responses)

Introduction – Comfort and Basic Information:

- a. Ensure comfort – is this still a good time for the interview? Is there anything I need to know etc. If in person, offer refreshments if possible.
- b. Briefly describe my project and it’s purpose (details depend on if I interviewed them already in the time following the course)
- c. Explain that this interview is not a test and there are no ‘right’ answers (i.e. no reason to say you are using TNS stuff if you are not). Encourage them to be honest about what they have done as this will help inform future courses and potential participant support. Let them know that at the end I will also ask them what they plan to do next.
- d. What organization or community do you represent?

Theme 1 – Participants’ Story:

1. What is the story that you tell people about your experiences in the course?
2. What do you tell people now about TNS in general?

Theme 2 – Impact:

3. Thinking back to the course itself, what stands out to you most now? What do you remember?
4. Has the course had any impact on your work? – Please expand, elaborate, comment etc. In what ways?
5. Has the course had any impact on you personally and/or outside of work? (Probes: i.e. lifestyle changes, community work), – Please expand, elaborate, comment etc

Theme 3 – Implementation:

6. Have you used any part of the framework or tools from the course in your work?
 - a. If yes to #6 - which ones specifically, and how have you used them? (probe with names of tools from framework etc.)
 - b. If yes to #6 – please describe some details from your experience using the tools/framework. Did you get the results you hoped for? Were there any challenges in using the tools/framework? – Please tell me about those...
 - c. If yes to #6, how confident were you in using the tools/framework? How did it go? How did you do/performance?
 - d. If yes to # 6: Are you planning to use the framework in the future? Do you see opportunities to use it?
 - e. If no to #6 – why not? Were there barriers for you to use the tools/framework? – (Probes: Timing, concern about your abilities/competence to use the tools/framework/ no clear fit or entry point to use it?)
 - f. If no to #6 - Were there situational barriers (administration, timing, financial etc)
 - g. If no to #6 – are you planning to use the framework in the future? Can you see opportunities to apply the framework in the future?
7. Would you have liked more of an emphasis on developing teaching and facilitation skills as part of the course?

Theme 4 – Follow-up and Support:

8. Did you get the follow-up package from TNS/the facilitators?
 - Have you looked at it? Was it useful? If so – how? If not – why not?
 - What exactly did you do with it?
9. What type of follow-up or support would help you the most in accessing and applying the TNS framework / tools?
 Probe: How could TNS support you further in using/applying the framework (emails, more resources, success stories)?

Theme 5 – Networking:

10. Have you been in contact with anyone whom you took the course with? Why and in what context etc?
11. Would you like to have further contact with course participants, or hear about participant progress? If yes – how should this be accomplished?
12. Thinking back, would you have liked to have more overt or specific opportunities to interact with other participants during the course time?

Theme 6 – The Future:

13. Are you interested in more training with TNS? If so, what else would you be interesting in learning? Probes: Any specific suggestions for follow-up courses? Refreshers? Future get-togethers with participants?

Theme 7 – Reflection and Final Thoughts:

14. Is there anything you would suggest for change and improvement to the course?
15. Is there anything else you would like to say about your experience in the course?
Anything you would like to ask me?

Many thanks for your time and help today!!

Appendix E: TNS SFL Questions for 3-4 Month Written Follow-up

- 1) The story I tell people about TNS and my experience in the Sustainability for Leaders course is...

- 2) Have you used specific tools from the course or elements of the TNS framework in the work that you do?
 - If yes – which ones and how?
 - If no – why not?

- 3) Thinking back to the course now, did you get what you wanted out of the course? Please elaborate on your answer...

Appendix F: Leadership Practices²

Sustainability for Leaders

7 Practices of Sustainability Change Leaders

Get credible, stay credible: It is important to establish your personal credibility early on. You must earn the right to lead the sustainability transformation. Leadership is about influence and relationships based on trust. Trustworthy, credible leaders are honest, forward-looking, inspiring, and competent. You need to build trust quickly.

Dialogue: Developing persuasion/selling skills that allow you to influence others makes you a more effective leader. You must be able to use dialogue to advocate for breakthrough sustainability goals and a culture of sustainability. Dialogue reminds us that communication is a two-way street with many interesting intersections, not a one-way, dead-end alley.

Collaborate, educate, network: People collaborate when it is in their self-interest to do so, so you want to connect peers with purpose. People who share a compelling vision of the entity you are trying to move toward sustainability will work together, share resources, reallocate budgets, and contribute expertise because they want to make their common dreams come true. They need each other's help and connections to make it happen.

Meet them where they are: Inevitably, you will face opposition. Opposers think your proposals are wrong for the business and /or wrong for them personally. When you confront different worldviews, talk the jargon of the opposers and show how sustainability strategies are relevant to their priorities.

Piggyback existing initiatives: In some companies, hitching your sustainability wagon to an existing high-profile horse will help move it in the right direction. Wherever possible, use existing processes. This allows easy access to resources and know-how, and helps create support by getting more of the mainstream organization involved.

Influence the influencers: It is nearly impossible to accomplish transformation to a sustainability culture without long-term buy-in and active support from a majority of the network of formal and informal power brokers in the organization. Work the chain of influence leading to the key people. Use the "Collaborate, Educate, Network" practice. Start with your network of kindred spirits and their contacts; then collaboratively find paths through the chain of influence that connects to senior gatekeepers.

Practice 'Planful Opportunism': Be opportunistic and adapt to new circumstances as they arise. Be flexible about timing and paths to success, but do not budge on achieving real progress toward your visionary sustainability goals.

Adapted from Willard, Bob. 2009. The Sustainability Champion's Guidebook: How to transform your company. New Society Publishers, Gabriola Island, British Columbia, Canada. pp.35 -50 . Used by permission.

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Appendix G: Details and Quotes for Recommended Leadership Integration #2 for TNS Use.

- Examples of connecting TNS framework to Bob Willard's 7 Practices include:
 - Understanding and doing your best to live the 4 TNS principles of sustainability will help you with practice #1 – **Get credible, stay credible**. ‘if you’re touting sustainability stuff you have to, at some level, be practicing it in your everyday life and leaders do that – that’s a hard thing to talk about’ VAN6A P7
 - Understanding the action planning process you will learn with the framework (including backcasting) will help you with practice #5 - **Piggyback existing initiatives** (such as strategic planning)
 - Having TNS framework behind you will help you with practice #6 **Influence the influencers** by having science and examples to back up what you are saying. ‘the people who were leading the sustainability within the institution and the leaders are not necessarily the same people.... its collaborating and working with senior leadership and (champions seeing) how they can have more influence’ HAL1 P18