

EMERGING ENVIRONMENTAL LEADERS PROGRAM

RESEARCH SUMMARY & PROGRAM DESIGN

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I. Introduction:

Kopernik has been engaged by The David & Lucile Packard Foundation (“Packard Foundation”) to assess and design options for an Emerging Environmental Leaders Program that provides a range of support to emerging leaders working to achieve environmental and social sustainability in Indonesia. This research and the resulting report have been developed by Kopernik with the following goal:

To develop a program that would help increase the strength of the environmental and social sustainability sector in Indonesia, and would lead to a set of new organizations and institutions in-country, staffed by capable and effective leaders, that are increasingly working together to advance important policy decisions and management practices in support of long-term environmental and social sustainability.

The scope of this assessment included:

- Review of the documentation for Packard Foundation’s country strategies and existing leadership programs that Packard Foundation has been supporting;
- Identification and profiling of relevant stakeholders in the environmental leadership sphere in Indonesia;
- Review and prioritization of the identified stakeholders for interview selection together with the Packard Foundation team and conducting interviews;
- Analysis and interpretation of the interview results and recommendation for the design of the Emerging Environmental Leaders Program by Kopernik;
- Review and discussion of the findings, potential options and suggested design with Packard Foundation and selection of the final program design.

II. Executive Summary:

Over a four-month period (August to November 2017) Kopernik conducted 53 interviews with a range of respondents that included: potential leadership program candidates, past leadership program participants, leadership program implementers, funders and potential host organizations. The Kopernik team also reviewed several studies on the effectiveness of leadership training.

Based on the analysis of this research, Kopernik’s experience and understanding of the Indonesian context and discussions with the Packard Foundation, a proposed design has been developed for the Emerging Environmental Leaders Program in Indonesia to meet the above-stated goal.

It has been mutually agreed that the proposed leadership program would provide its participants with the ability to:

- Form meaningful connections with a diverse group of other emerging leaders in Indonesia.

- Develop a holistic mix of hard, soft and transformative leadership skills needed to lead an organization, team and to influence policy.
- Participate in an active alumni network following the completion of the program that continues to provide peer support over the longer-term.
- Access personalized mentorship to guide them in developing and strengthening their individual programs or organization.
- Receive financial support as committed leaders to advance promising projects and ideas.

The proposed program will be designed specifically for a diverse audience of emerging Indonesian leaders with three to nine years of leadership experience (from broad age groups) and have the following components:

- A four to six day “core” training program that includes seminars by facilitators and guest speakers, group workshops and informal discussion sessions.
- Annual two to three day alumni follow-up events, personal mentors and/or ‘agents’ available to participants for 18 to 24 months and an establishment of the alumni network organized on a cohort and also regional chapters levels.
- A diverse cohort that: i) is balanced between marine, agriculture and palm oil, as well as participants from other or mixture of environmental sectors and ii) comes from a variety of professional affiliations including, civil society private sector and if necessary some representatives of the local government.
- Nation-wide cohort that emphasizes recruitment of women leaders as well as participants from under-represented areas who would otherwise not have access to this kind of programs and de-prioritizes the areas with higher existing access to opportunities such as Java and Bali.
- Skill development in soft and transformative skill areas including but not limited to: project management, communications and networking as well as better understanding of personal leadership style.
- Ten grants available for each cohort: three grants of IDR 100 million and seven grants of IDR 50 million.

III. Methodology:

During the first step of the project Kopernik identified and developed profiles of 34 leadership programs, 38 potential emerging leader candidates, 17 past program participants, 12 funders and 7 potential host organizations. In collaboration with the Packard Foundation team, Kopernik designed the interview questionnaire, prioritized the stakeholders in each category and selected the top priority ones to interview. During the second step, 53 interviews were conducted with the priority candidates and programs. In addition, three studies on leadership development conducted by McKinsey, Bridgespan and Laura Callanan were reviewed as part of the research process.

In the final third step the findings were analyzed and presented to Packard Foundation in the form of a memo draft and a face-to-face presentation in Palo Alto on December 18, 2018. During this meeting Kopernik and Packard Foundation teams held a facilitated discussion to review the findings and agree on the program design moving forward.


IV. Findings and analysis of options

- *Participant Profile, Corresponding Skill Development and Affiliation*

For the purposes of this project, emerging leaders are understood by Packard Foundation to be “leaders with 15 or fewer years of experience working in civil society and/or areas related to environmental or sustainability issues. They may be leaders or founders of community-based organizations, in academia, or in mid-level positions at larger organizations or institutions, including innovative individuals from within regional government and institutes, as well as from the private sector.”¹ Kopernik’s focus during the research process was therefore on potential or past leadership program participants between the ages of 23 and 48 years.

Representatives of established leadership programs were interviewed on the effects of having a wide range of ages versus a more focused age group. While focusing on a narrower age group allows for a greater focus on that group’s needs, generally it was found through Kopernik’s research that people preferred having diverse ages that enabled cross-generational peer learning and sharing of different perspectives. It’s been agreed then that the program should focus the recruitment on the level of experience rather than age to better cater the content to emerging leaders but enabling participants from different age groups, who are relatively new to leadership, to join the training. As Packard Foundation’s goal behind this program is to focus on the emerging leaders, the recommendation is to target those with three to nine years of experience without accompanying strict age limitations and allow for outliers that demonstrate high potential. The table below provides a summary of the advantages and the disadvantages of the options and the recommendation.²

¹ “Emerging Environmental Leaders of Indonesia Request for Proposals—Planning Project”, Packard Foundation, March 2, 2017

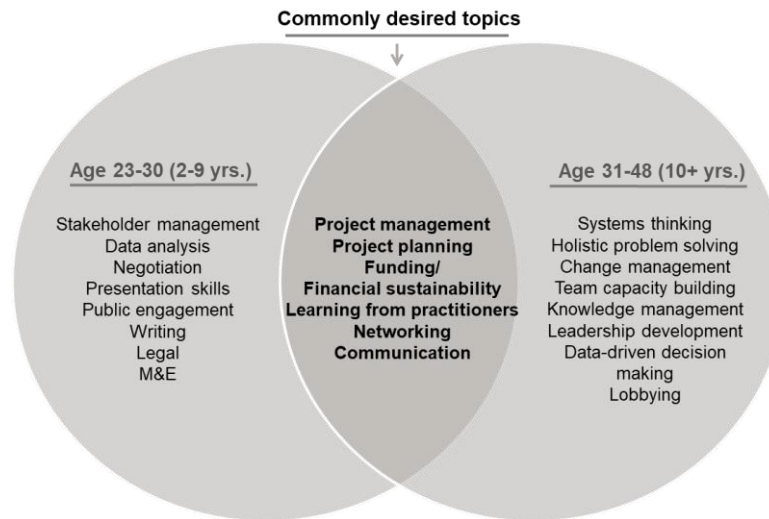
²  This box indicates the preferred option as identified by Kopernik and Packard teams during the joint wrap-up meeting in Palo Alto on December 18th, 2017.

OPTIONS	DESCRIPTION			PROS	CONS
	Leadership Experience	Leadership Level	Key Needs		
1. EMERGING LEADERS	3-9 years	Junior management in an organization/ government/ company or leader at a small initiative	<ul style="list-style-type: none"> Data analysis and M&E Negotiation skills Presentation skills Public engagement Writing 	<ul style="list-style-type: none"> More topic focused hence can explore each one in more depth Participants are more likely to face similar leadership issues so it's easier to relate 	<ul style="list-style-type: none"> People might not have a lot of leadership experience yet The impact is further in the future.
2. MID-LEVEL LEADERS	10-15+ years	Middle management in an organization/ government/ company or leader at a small to medium-sized organization/enterprise.	<ul style="list-style-type: none"> Systems thinking Holistic problem solving Data-driven decision making Change management Team capacity building Knowledge mgmt. Lobbying 	<ul style="list-style-type: none"> More topic focused hence can explore each one in more depth Participants are more likely to face similar leadership issues so it's easier to relate People are more likely to have experiences that they can share resulting in peer learning 	<ul style="list-style-type: none"> Participants might have already had leadership training support They might be more reluctant to change their leadership style (especially for the older people)
3. BOTH	3-15+ years	Junior management and middle management	<ul style="list-style-type: none"> Project management & planning Funding/Financial sustainability Learning from practitioners Networking Communication 	<ul style="list-style-type: none"> Diverse levels of experience can encourage peer mentorship and sharing Bigger pool of people to select from 	<ul style="list-style-type: none"> Less topic-focused foregoing depth or Need to create separate sessions for different age groups Participants might find it harder to relate to each other's leadership issues

The interviews showed that having a few years of leadership experience was important for people to have a sense of awareness of their project vision, types of skills that make a great leader and their personal skill gaps. The program would therefore not target recent graduates and the minimum age is proposed to be at least 25.

The types of skills that leadership programs typically develop can generally be categorized into technical or hard skills, soft skills and transformative skills. Technical and hard skills are specific and tangible in nature and can be more easily defined and measured such as writing, budgeting, monitoring and evaluation, accounting and in this specific context could include sector-specific technical skills like environmental conservation valuations. Soft skills are less job-specific or tangible and often involve interpersonal skills such as effective communication, listening and team building. The last one, transformative skills, refers to skills associated with learning more about yourself, understanding your own leadership style and how to lead, influence and motivate others. It is generally recognized that all three types of skills are essential to successfully lead an organization or an initiative.

Kopernik's research found that different age groups tend to prioritize the need for the development of the three types of skills slightly differently. Interviews with potential candidates and past program participants across different age groups revealed both strong similarities and unique needs when it came to what they wanted to learn and develop. While the younger respondents (23-30) often mentioned technical and hard skills; older, respondents (31-48) who also typically had more experience, showed somewhat greater preference towards softer and more transformative leadership skills.



Depending on the age and experience of the cohort selected, the program could adjust the content accordingly to prioritize the corresponding set of skills that need to be developed. While a program that focuses on a broad spectrum of ages and experience would need to address the overlapping needs that have been identified as being relevant and needed to be developed across age groups, such as project management and planning, funding and financial sustainability as well as communications and networking. Below are the pros and cons of the different options for the types of skills that the leadership program could focus on developing.

OPTIONS	DESCRIPTION	PROS	CONS
1. TECHNICAL & HARD SKILLS FOCUSED	<ul style="list-style-type: none"> • Project management including planning and budgeting • Technical writing such as policy, proposals, reports • Data analysis and impact assessment methods • Systems thinking 	<ul style="list-style-type: none"> • Has more immediate and tangible impact • Gives a greater sense of having learned a skill • Addresses identified needs of the younger leaders 	<ul style="list-style-type: none"> • Focused on technical knowledge rather than building capacity for strong leadership • Doesn't address the identified needs of the older/emerging leaders
2. SOFT & TRANSFORMATIVE SKILLS FOCUSED	<ul style="list-style-type: none"> • Presentation and communication skills • Negotiation and networking skills • Team capacity building • Change management • Leadership development 	<ul style="list-style-type: none"> • Enables participants to better understand themselves and others • Builds leadership capacity for more connection, influence and magnetism. • Addresses identified needs of the more mature leaders 	<ul style="list-style-type: none"> • Limited immediate, short-term tangible results so it's hard to measure success.
3. ALL TYPES OF SKILLS	Covers most of the above topics but in either: <ul style="list-style-type: none"> • Lower levels of detail and depth or • Group format with parallel sessions being offered to participants that they can chose from 	<ul style="list-style-type: none"> • More holistic approach to leadership 	<ul style="list-style-type: none"> • The level of depth is lower or • Requires organizing parallel sessions requiring multiple speakers and facilitators

Despite some variation in preferences for the needed skillsets, there are more similarities in responses across the ages than there are differences. Other consideration that was reviewed when choosing the types of skills the program would focus on, is the existing trainings available. It's been suggested that technical skills trainings are more easily available in Indonesia than those that develop soft or transformative skills.

In line with the above findings and considerations, Kopernik and Packard Foundation concluded that it is more impactful to have the program focus on a combination of soft and transformational skills such as program management, communications and networking as well as understanding your personal leadership style and how to affect change. Due to the availability of technical training, instead of offering it as part of the core program, it was suggested that the program organizers and/or mentors seek out personally catered opportunities for the individual alumni to join these trainings as part of cohort support.

Affiliation

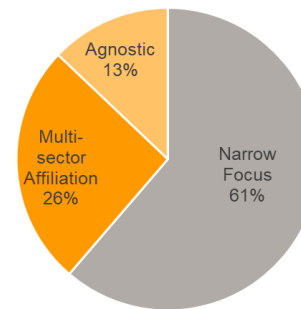
Analysis of existing leadership programs showed that nearly two-thirds of them were focusing on a particular professional affiliation – which may be government, civil society, academia or social entrepreneurship. However, if student programs were excluded from the analysis, the breakdown became more even with nearly 50% targeting a specific affiliation and 50% having a multi-affiliation focus.

During the interviews when the Kopernik team discussed this matter with the respondents, there was no strong preference for having participants share the same professional affiliation. Some participants acknowledged that the private and public sectors often find it difficult to talk to each other and hence creating a safe space for them to establish dialogue and collaborate on tackling sustainability issues may help address this challenge.

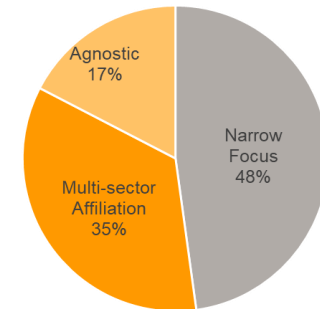
Similar to the earlier discussion about the benefits of diversity in ages, it is proposed that the cohort is representative of various professional affiliations including civil society, private sector, local government and to a limited extent - academia. Having a group with a broader set of professional affiliations is not expected to be problematic as both Kopernik interviews and external research show that the leadership development needs tend to be analogous across professional backgrounds. A study by the McKinsey survey of Social Sector Leadership found that the needs of leaders “were more homogenous than we expected” regardless of demographics (their age, time in sector), market orientation, or program area leading McKinsey to conclude that “despite the fragmentation in the sector, when it comes to leadership the needs are pretty similar”.³

It is important to note that while there are clear benefits in having a range of affiliations and ages, the participants’ goals and purpose should be appropriately aligned towards addressing long-term environmental and social sustainability issues in Indonesia, and should be carefully evaluated as part of the selection criteria.

Affiliation type
Percentage (n=31)

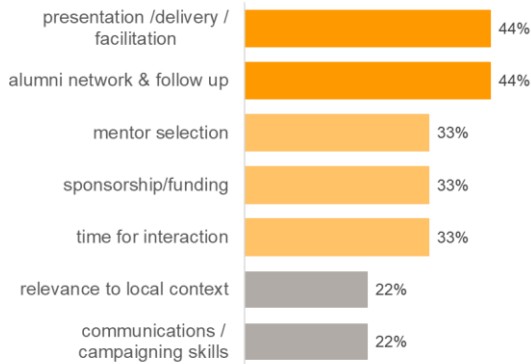


Affiliation type (w/o student programs)
Percentage (n=23)



³ “Social sector leadership survey – findings”, McKinsey & Company, March 2013

What participants wished they had or was done better
Multiple responses, percentage (n = 9)



keep the “core” program concise to make it more accessible to the participants that cannot afford to take extended time away from their jobs. In fact, gaining the permission of the participant’s organization was noted as a common challenge when selecting and retaining participants throughout the length of the program. Failure by the participants to gain full support of the organization for the needed time off often resulted in participants being distracted during the session or dropping out of the program altogether.

On multiple occasions it was suggested by the existing leadership programs and past participants that making the “core” program residential offered extra benefits such as informal discussions and relationship building through evening-time activities that were highly appreciated by the participants and were largely absent in the non-residential programs.

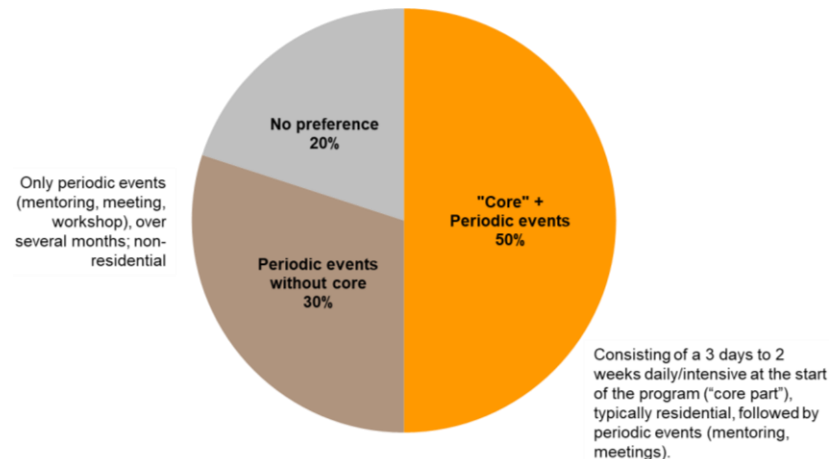
In addition to mentorship and alumni support, the majority of the stakeholders identified financial support as being an integral part of the program. Most often the support in the existing programs was offered in the form of stipend and/or free participation in the training. In the case of

Program Structure and Types of Support

The majority of stakeholders identified follow-up support as being essential for the training to have a long-lasting impact. This follow-up support was most often defined as facilitated alumni network events, ongoing mentorship and on-the-job coaching. In their 2014 publication “Grooming Top Leaders: Cultural Perspectives from China, India, Singapore and the United States.”, The Center for Creative Leadership identified similar needs and recommended a breakdown called the 70/20/10 Model, which structures learning by the means of on-the-job stretch opportunities (70%), coaching and mentoring (20%), and formal training programs (10%).⁴ In combination these sources point to the strong need not only for training but also for guided practical application through mentorship and peer-support from an appropriate professional network.

The interviewees also mentioned the need to

Desired duration and frequency
percentage (n=20)



⁴ Wilson, Meena S., Ellen Van Velsor, Anand Chandrasekar and Corey Criswell. “Grooming Top Leaders: Cultural Perspectives from China, India, Singapore and the United States.” Center for Creative Leadership, 2014.

entrepreneurship-focused programs there was often an opportunity to apply for a grant following the program to be used as either seed funding for the initiative or general support to the entrepreneur during the start-up or scale-up period.

While all these extra forms of support would be highly beneficial, they can be also quite costly. The goal of this research was to find the right combination of services and structures that would provide the highest level of impact for an investment of around \$300,000 per year.

OPTIONS	DESCRIPTION			PROS	CONS
	Structure	Duration	Frequency		
1. LIGHT TOUCH	<ul style="list-style-type: none"> Event + alumni social media group 	<ul style="list-style-type: none"> 5-7 days 	<ul style="list-style-type: none"> one-off event 	<ul style="list-style-type: none"> Low budget Quick to organize 	<ul style="list-style-type: none"> Lower levels of impact and knowledge gain
2. MEDIUM TOUCH	<ul style="list-style-type: none"> Core Event + 1-2 follow-up events + informal alumni groups + cohort mentorship 	<ul style="list-style-type: none"> Core: 5-7 days Follow-up events: 2-3 days Alumni organize their own events/groups Mentorship for 1 year 	<ul style="list-style-type: none"> Core event: 1 Follow-up events: once per year Alumni organize their own events/groups Mentorship: quarterly 	<ul style="list-style-type: none"> Not low budget but still affordable Good value for money; middle ground between impact vs effort 	<ul style="list-style-type: none"> Medium to high budget Reliant on alumni to facilitate their own group
3. DEEP IMMERSION	<ul style="list-style-type: none"> Core Event + 3-4 follow-up events + facilitated alumni groups + cohort mentorship 	<ul style="list-style-type: none"> Core: 5-7 days Follow-up events: 2-3 days Alumni events Mentorship for 2 years 	<ul style="list-style-type: none"> Core event: 1 Follow-up events: twice per year Alumni events: annual Mentorship: monthly 	<ul style="list-style-type: none"> Highest level of potential impact and knowledge gain 	<ul style="list-style-type: none"> Highest budget Requires heavy long-term commitment from organizers & participants

Looking for the best value in terms of potential longer-term impact within the given level of investment, it is suggested that the overall support be offered for at least six years (three to four cohorts) with one multi-day follow-up session each year for all cohorts and the costs directly associated with participation in the program being covered. At the three year mark the program will be evaluated and successful elements can be further expanded or replicated for a gradually deeper immersion. More specifically, the program structure would include:

- Intensive residential core training of four to six days consisting of ice-breaking activities, lectures by instructors on skills previously identified, and group discussions;
- An opportunity to apply for grant funding following the completion of the core training session;

- Self-action learning through personal project implementation between the core and follow-up sessions;
- Annual two- to three-day follow-up sessions that bring the cohort back together to discuss and workshop the common issues identified during the self-action period;
- Quarterly mentorship during the self-action period and follow-up sessions to help the participants work through their challenges and supporting them in their work by connecting them to other relevant trainings and networking opportunities;
- Alumni network that is organized on a cohort and also regional chapters levels. Regional chapters can become especially useful once a number of cohorts undergo the program and the alumni network grows in specific geographic areas.

Following the end of the three-year program alumni are encouraged to maintain the network and are provided with the framework to maintain group communication including nominating or electing a group champion for the entire program cohort (all years) and any regional chapters and establishing social media groups and pages.

The size of the cohort that was recommended by the established leadership programs varied between 10 and 20 people with the most commonly preferred size being around 12 to 14 people as it is small enough to enable everyone to participate but large enough to be able to split people into teams by interests, sectors or affiliation where necessary.

- o *Thematic Content by sectoral areas and geographic focus: national level vs focused locations*

Packard Foundation's country strategy in Indonesia focuses in three sectors: marine conservation, agriculture and palm oil. The interviewed leadership programs, potential candidates and past participants came from all three sectors. Across these three groups of stakeholders the preference was for diversity that would enable participants to collaborate and learn from their peers across sectors. While different sector-specific issues can be included in the case studies used during the learning sessions, the overall content should focus on broad environmental topics.

OPTIONS	DESCRIPTION	PROS	CONS
MIX ALL 3 SECTORS	<ul style="list-style-type: none"> All 3 sectors are combined: Marine, Agricultural, Forestry Topics are specific to the above sectors 	<ul style="list-style-type: none"> Wider cross-sector networking and peer learning opportunities Encourages collaboration across sectors for policy/ environmental protection/ etc 	<ul style="list-style-type: none"> Broader thematic content that foregoes depth or Need to create separate sessions for different theme groups If splitting into groups, then might require greater number of speakers/facilitators
SPLIT INTO 2 SECTORS	<ul style="list-style-type: none"> Split into 2 cohorts with Agricultural and Forestry as one and Marine as the other Topics are specific to the groups 	<ul style="list-style-type: none"> Still allows for great degree of focus and relevance as Agriculture & Forestry have a lot in common 	<ul style="list-style-type: none"> Very limited collaboration across all sectors.
ONE TRAINING PER SECTOR	<ul style="list-style-type: none"> Split into 3 cohorts, one per year. Topic are more broad and emphasize cross-sector issues 	<ul style="list-style-type: none"> Greater focus hence more in-depth exploration of each sector. More relevant content and speakers to the participants 	<ul style="list-style-type: none"> Requires organizing 3 separate programs including separate speakers, mentors, etc No collaboration across all sectors.

Much like with the greater diversity between ages and affiliations, diversity in sectors and geographies represented by the participants can aid in the development of a national level collaboration on environmental conservation efforts and policy. According to the Bridgespan research, “the need to support increased diversity among leaders” was identified as a consistent theme across the existing leadership programs.⁵ While priority should be given to under-represented regions and groups with lesser access to opportunities for capacity building and networking support, it is also important to recognize that politically central regions such as Java and Bali offer a chance to form important contacts and networks that could be critical for policy development.

⁵ “Draft research findings on the evidence base for leadership development programs and scan of providers in the foundation’s program areas”, the Bridgespan Group, JULY 6, 2015

OPTIONS	DESCRIPTION	PROS	CONS
NATIONAL	Focus is on the diversity of the participants including those based in Jakarta	<ul style="list-style-type: none"> • Wide network enables more national-level discussions and actions. • Might be easier to create links to influential policy people who are typically located in Jakarta. 	<ul style="list-style-type: none"> • Geographies might be spread thin with 1 or 2 people from the same area so it's harder to have any regional impact.
PACKARD STRATEGY GEOGRAPHIES	The cohorts will be split into 2: 1. Marine focusing on NTT, NTB, Bali, East Java, West Papua, South Sumatra 2. Agriculture and Palm Oil focusing on: Riau, South Sumatra, Kalimantan and Papua	<ul style="list-style-type: none"> • Focus on a few regions and specific sectors allows for more in-depth and relevant content and enables formation of regional-level action. 	<ul style="list-style-type: none"> • Might be challenging to recruit participants that fit the profile due to sector and geographic restrictions.

V. Suggested Program Design:

Based on the discussion and the recommendations made in the previous sections Kopernik and Packard Foundation teams have derived the following program design.

PROPOSED DESIGN

PARTICIPANTS PROFILE	<ul style="list-style-type: none"> • Focus on those with 3 to 9 years of leadership experience (not necessarily age) but allow for outliers to be admitted based on demonstrated high potential • Strong participation of women and indigenous communities emphasized • Focus on civil society & the private sector, but open to (local) government and academia • 15 solid participants
STRUCTURE & TYPES OF SUPPORT	<ul style="list-style-type: none"> • 6-year program (3rd year to serve as a check point), medium touch to start, and gradually aim for deeper immersion • Mentors and ‘Agents’ providing customized support to participants • Support provided to leaders, not organization • Access to funding (IDR 50 million and 100 million) for selected participants
THEME & GEOGRAPHIC FOCUS	<ul style="list-style-type: none"> • No quota by sector but should have representation of land & marine environment sectors • Nation-wide coverage (East, Central and West) while prioritizing the Packard’s strategy provinces through ‘scouts’ (de-prioritizing Jakarta and Bali) • No sector theme-specific sessions, rather use ‘case studies’ showcasing the relevant themes in the core program (and possibly use of mentors with thematic expertise)
SKILL DEVELOPMENT CONTENT	<ul style="list-style-type: none"> • Focus on soft and transformative skills, intentional resources built into the alumni/mentorship piece to have hard skills development as well as opportunities to connect the cohort with technical training

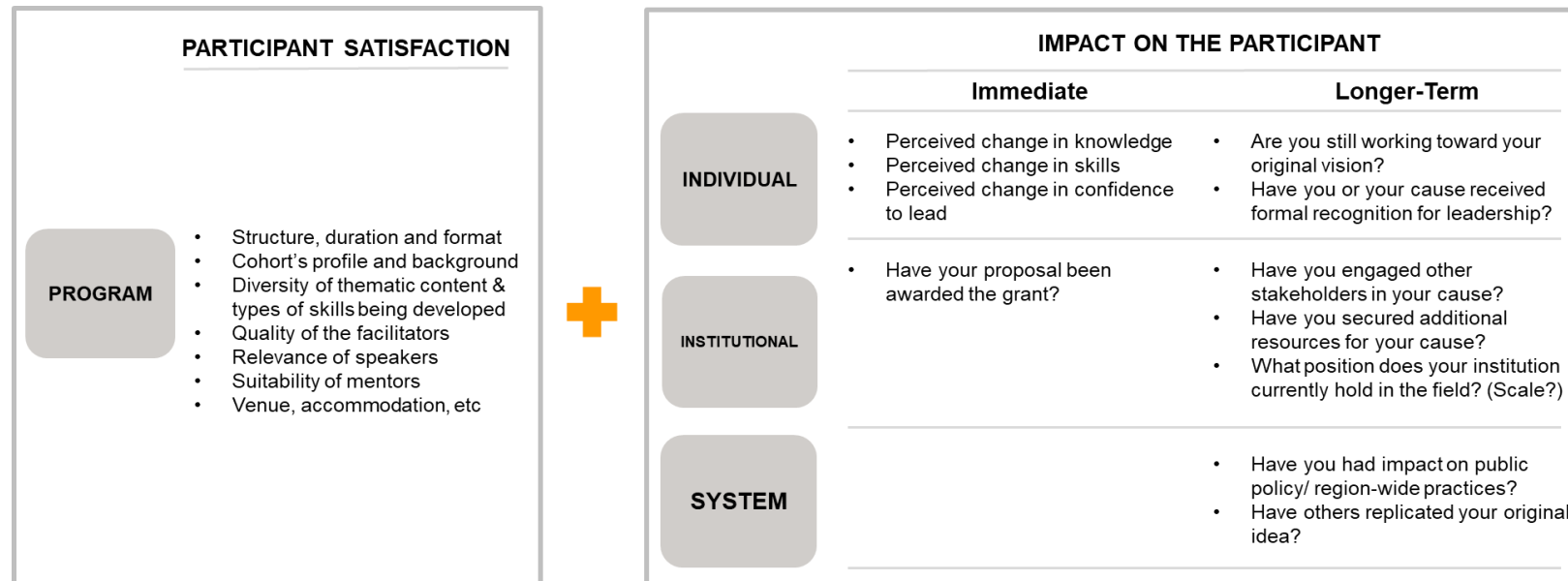
VI. Measuring Success:

The intangible nature of leadership development makes it challenging to develop concrete and measurable indicators of success. Because true impact might not be observed until many years into the future, it is hard to attribute any effect directly to the training. According to Bridgespan, a 2014 survey of fellowship programs found that only 26% of respondents had performed a program evaluation.⁶

There are growing efforts on the part of the existing leadership programs to create meaningful measures of success. The success of the program generally falls into two types:

1. Participant satisfaction with the program's content and administration and
2. Impact on the participant which can be further divided into:
 - Immediate: largely based on the participant's perceived changes and knowledge gain and
 - Longer-term: that can be observed in the cohort's successes in their initiatives over the course of a few years following the training.

The latter one is particularly challenging to measure but is at the same time the best indicator of success. Based on the analysis of existing good practices it is suggested that the longer-term impact is measured based on three parameters: personal, institutional and economic.



⁶ "Draft research findings on the evidence base for leadership development programs and scan of providers in the foundation's program areas", the Bridgespan Group, JULY 6, 2015

VII. Appendix:

- *Theory of change: potential leaders + adequate support = positive change*

