

# PROJECT VISION, PURPOSES, AND METHODOLOGY

## Vision and Purposes

*The broad vision for the project has been to undertake an exploratory study of the role that unusually talented young and old sage leaders play in lending their experience, judgment, and wisdom to advance the civic welfare of Grass Valley and Nevada City, California.*

Five specific project purposes were crafted from this over-riding vision:

- We sought to understand and describe the civic engagements of Senior Sage Leaders (the hidden and often ignored social capital) and Emerging Sage Leaders (the rising next generation), with “civic engagement” understood to mean both voluntary and paid involvement in nonprofit and community public service activities.
- We sought to identify and describe what motivates Senior Sage Leaders and Emerging Sage Leaders to provide exemplary civic leadership, and to learn what benefits they receive in return from their civic involvements.
- We sought to understand the views that Senior Sage Leaders and Emerging Sage leaders have about leadership, including changes in their own leadership over the years.
- We sought to understand the views that Senior Sage Leaders and Emerging Sage Leaders have about their personal and professional growth, religion, spirituality, and the meaning of wisdom.
- We sought to understand why some persons who possess sage leadership qualities are not civically involved, and what might be done to cultivate and expand the community’s pool of Emerging and Senior Sage Leaders.

## Phase One: Getting Started

The first challenge was to understand what might go into an operational definition of *sagacity*, which is associated with wisdom and is most often linked to Ancient World myths, legends, and stories about demigods, oracles, shamans, prophets, and the lives of distinguished philosophers. In this meaning of the term, *sagacity* has to do with wise or holy figures who possess insight and understanding beyond ordinary people, who are custodians of rare knowledge, and who are examples of goodness, virtue, and wisdom.

For our purposes, we have loosely defined sagacity to mean *wisdom in action*, or *active reflective practice*. Sagacity implies *unusual effectiveness that only exposure to experience can achieve*.

And we also link sagacity to *generativity*, the motive of wanting to leave behind a legacy from our lives, something that has lasting human value.

The second challenge was to define leadership characteristics of fully human sages that could be used to guide the project's identification and selection of community sage leaders in Grass Valley Nevada City. After much discussion, it was concluded that sage leaders tend to possess five unique traits: 1) They have strong orientation to others and demonstrate their respect and care in everyday life. 2) They possess a quiet self-confidence that has a calming effect on others. 3) They possess and can articulate a working theory of human nature, of organizations, and of leadership. 4) They possess a broad world view. 5) They are active students and teachers.

Using the general definition of sagacity and the five traits of sage leadership, the project coordinator and senior advisers next sought the voluntary involvement of a small leadership group of men and women who most reflect these qualities and also possess undisputed reputations for civic involvement in Grass Valley or Nevada City as either Senior Sage Leaders (ages 56+) or Emerging Sage Leaders (ages 25-55). Five men and five women were selected by the project coordinator for each of the two age groups, and this 20-person leadership team became the Sage Leader Project Coordinating Committee. These two, ten-person teams proceeded to nominate numerous individuals who possess the sage leader qualities that were being sought. From these nominations, 80 community leaders were selected by the two teams based on three additional criteria: 1) Their civic engagement in a wide range of nonprofit and/or

public service community activities in Grass Valley and/or Nevada City. 2) Their gender, with the goal of achieving as close a balance between men and women as possible. 3) Their length of residence in the region's immediate communities.

Including the 20-person Coordinating Committee, then, a total of 100 sage leaders were selected for the project. While certainly not the entire pool of community sage leaders in Grass Valley and Nevada City, those nominated and chosen were judged to be highly representative.

### **Phase Two: The 100 In-Depth Interviews**

Well prior to conducting the 100 individual in-depth interviews, the Sage Leader Coordinating Committee generated a list of interview questions to be asked by each member of the two interview teams. Twenty-one questions were ultimately selected for the interview protocol. The Coordinating Committee also prepared a Biographical Questionnaire to be anonymously completed by each of the 100 interviewees. The purpose was to compare responses of emerging and senior sage leaders, and then the two cohorts with the general population through Nevada County Census questions and other sources of county information.

To begin, pilot interviews were held within each of the two interview teams to test the interview protocol and to gain experience in interviewing and in being interviewed. These pilot interviews were conducted in two-person teams and produced the first 20 written Sage Leader Interview Profiles. As a way to build mutual trust and understanding, each interview team shared the results of their own Profiles with one another. Thereafter, every member of the two, ten-person interview teams was assigned four additional interviews. When possible, assignments were based on the interviewer's acquaintance with the persons to be interviewed. The 80 additional interviews were conducted from April 1, 2009 through December 10, 2010, with mid-point meetings of the two interview teams held in June to review progress and make adjustments.

Just prior to the 80 in-depth interviews being conducted, the Project Prospectus and the Interview Questions were forwarded to each interviewee. Then, at the beginning of each interview, the interviewee was given the Biographical Questionnaire and was asked to return it anonymously to the project coordinator in a stamped envelope that was provided. Each interview was audio-

recorded, and each interviewee was identified by an assigned number rather than by name. The purpose was to ensure confidentiality. (Only the project coordinator knew the numbers assigned to the individual interviewee.) Each interviewee was also assured that the digital recording would be erased after the transcription was completed. And because the transcription was a written record of each person's life story as a sage leader, each interviewee was given an opportunity to edit his or her final Interview Profile.

A meeting was held with each of the two interview teams after all interviews were completed on December 10, 2010. The project coordinator provided each team member a Theme Identification Report procedure to guide their review of answers to each interview question across all five of their interviews (including the earlier pilot interview with their team partner). Then in February, 2010, the project coordinator and senior project adviser led a half day video-recorded seminar for each of the two interview teams. Using their individual Theme Identification Reports, team members identified and discussed things learned from the 100 interviews that were germane to the project's stated vision and purposes. Thereafter, the project coordinator and senior project adviser prepared a written draft of the Phase Two sage leader interview experience. The draft was reviewed by members of the two interview teams before the final narrative was completed.

### **Interview Questions**

You have been identified by friends and colleagues as one of our community's 100 top sage leaders. A sage leader is a person who brings *unusual experience, sound judgment, and wisdom* in working to advance the civic well-being of our community. We thank you for participating in our interview process.

1. To begin, how many years have you lived in Nevada County, and where in the county do you reside?
2. Are you working, semi-retired, or retired...And how old you will be on your next birthday?

3. If you would, please share a bit about your personal history: where you grew-up; where you went to school and college; what organizations you have worked for and the positions you have held.
4. Is there a history of community service in your family background? If so, how would you describe it?
5. What do you consider to be the major strengths and capabilities that have made you an effective community leader? Are they rooted in action, in your personal style, in your organizational, political, and personal relationships, or in something else?

6. There are five key roles that civic leaders often play in their community:

- *Mentor*: teaching and engaging others
- *Mediator*: helping to resolve conflict
- *Monitor*: serving as a community watchdog
- *Mobilizer*: working to bring about change
- *Motivator*: urging others to pursue worthy goals

As you think about your own involvement in our community, which of these roles have you played and which do you consider to be your strongest?

7. This project has to do with the involvement of sage leaders like yourself in civic organizations that seek to improve the quality of life and well-being of Grass Valley and Nevada City. This includes nine types of civic organizations:

- Fraternal and service clubs
- Social services organizations
- Educational organizations
- Governmental and political organizations
- Arts organizations
- Media organizations
- Faith-based organizations
- Environmental organizations
- Other nonprofit organizations

In which of the nine types of civic organizations on the list are you *currently* involved?  
Overall, how many total hours a month do you give to these organizations?

8. What is the name of the *one* organization on the list in which you are most involved and committed? Were you invited to become involved or did you approach the organization and volunteer your services? Are you paid or unpaid? On average, how many hours a month do you give to this organization?
9. I'd like to learn more about your involvement in your favored organization by asking four questions: *First*, describe the leadership role that you play within the organization. *Second*, in what ways do you believe you have *most helped the organization*? *Third*, as you think back over your involvement in the organization, what *roadblocks* have been most challenging? *Fourth*, what experiences within the organization have given you the *most meaning and satisfaction*?
10. I want to ask you three additional questions about your civic life: *First*, what motivates or inspires you to engage in community activities and causes? *Second*, do you feel that you are sacrificing anything in your life by being deeply involved in our community's civic organizations? *Third*, what personal benefits do you get from your civic involvements?
11. One of the benefits of growing older is that we are increasingly able to reflect on our experiences and to learn from them. Have you found any patterns of personal behavior no longer useful in your leadership role? If so, what are these and how have you changed?
12. What leadership qualities do you most admire in effective leaders that you have known? What qualities do you least admire in leaders?
13. What, if any, religious or spiritual traditions and practices do you most draw upon in exercising leadership?
14. How has your leadership style changed as you have progressed in life?

15. What is the one mistake you see leaders making more frequently than others?
16. What are you doing to continue growing and developing as a leader?
17. The two characteristics most often associated with sage leader wisdom are *unusual experience* and *the exercise of sound judgment*. What does having wisdom mean to you?
18. What are the one or two peak experiences in your life that set you on the path you're on today?
19. You probably know other individuals who have sage leadership talents and skills but are not currently involved in the civic life of our community. Why do you believe they choose to be uninvolved? What, if anything, might be done to get them engaged?
20. One final question: It is often said that the quality of life in our community is highly attractive and unusual. Do you believe this to be true? If yes, what are the three or four things about our community that you most value and make you want to continue living here?
21. Is there anything else you'd like to say or ask before we close?