

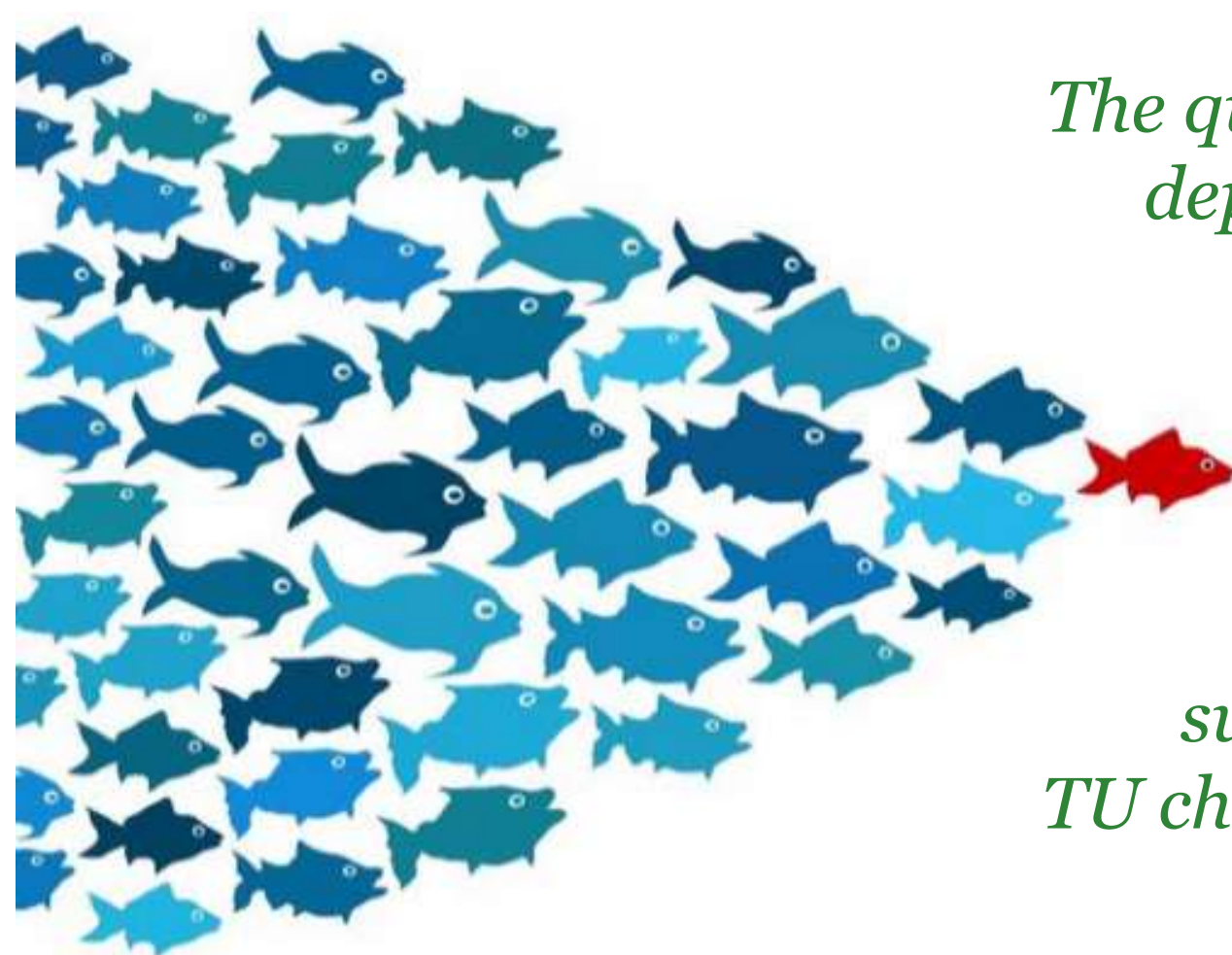


Succession Planning & Leadership Development

Jeff Yates, Director of Volunteer Operations
Beverly Smith, Vice President for Volunteer Operations

Tonight We'll Cover Two Scenarios:

- 1. Long-Term, Strategic Leadership Development**
- 2. Critical, Immediate Leadership Needs**

A large school of blue fish of various shades (dark blue, medium blue, light blue) is swimming towards the right. At the front of the school, on the right side, is a single red fish, acting as a leader.

*The quality and bench
depth of leadership
is one of the key
factors in
predicting
the long-term
success and
sustainability of a
TU chapter or council.*

Learning Objectives



- ✓ How to **identify** leadership needs in a TU chapter or council
- ✓ How to **inspire** future leadership in a TU chapter or council
- ✓ How to **build** effective leadership in a TU chapter or council
- ✓ How to **practice** effective leadership in a TU chapter or council
- ✓ How to **sustain** effective leadership in a TU chapter or council
- ✓ Learn from one another

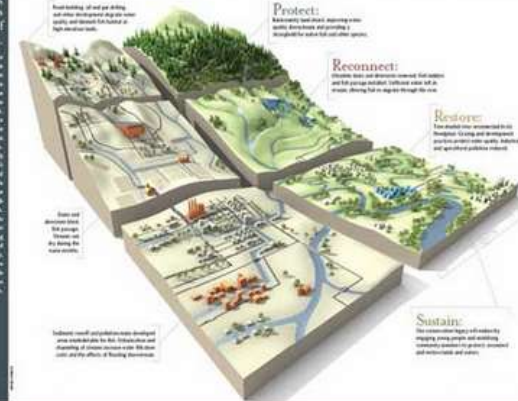
Identifying Leadership Needs

Start with a **strategic plan** discussion

- What is the **vision** for your chapter in the next 3-5 years?
- What are your **priority goals** in conservation, education and membership?
- What are the **specific tasks** that need to be accomplished to achieve these goals?
- What **skill sets** do these tasks require?
- What are the **gaps** in your current leadership team based on the skills needed?

Strategic Planning Resources

TU'S APPROACH TO CONSERVATION
A LANDSCAPE-SCALE MODEL TO HELP AT-RISK SPECIES ADAPT TO HUMAN INFLUENCES AND A CHANGING CLIMATE.



The following graphic shows two visions of the future.

On the left hand side, we see what a typical landscape looks like in the near future. It is a landscape that is dominated by human activities. The landscape is fragmented by roads, buildings, and other infrastructure. The landscape is also fragmented by natural features like rivers and forests. The landscape is a patchwork of different land uses.

On the right hand side, we see what a landscape could look like in the future. It is a landscape that is dominated by natural features. The landscape is connected by rivers and forests. The landscape is a continuous expanse of natural habitat.

Protect: Protect high quality habitat. The landscape is dominated by natural features. The landscape is connected by rivers and forests. The landscape is a continuous expanse of natural habitat.

Reconnect: Reconnect habitat and restore natural landscape. The landscape is dominated by natural features. The landscape is connected by rivers and forests. The landscape is a continuous expanse of natural habitat.

Restore: Restore natural landscape. The landscape is dominated by natural features. The landscape is connected by rivers and forests. The landscape is a continuous expanse of natural habitat.

Sustain: Sustain natural landscape. The landscape is dominated by natural features. The landscape is connected by rivers and forests. The landscape is a continuous expanse of natural habitat.

STRATEGIC PLANNING DOCUMENTS

[TU National Strategic Plan - 2015-2020](#) - PDF

[Strategic Planning Template for Chapters](#) - PDF

[Sample Chapter Strategic Planning Document](#) - PDF

Inspiring Future Leadership



To **attract new leadership**, you have to make leadership attractive!

- Do fun things and **build community** in your chapter.
- Invite everyone with **good communications** and diverse audiences.
- Use chapter events to **build relationships** and meet people.
- Be **welcoming and inviting** to newcomers and “outsiders”.
- Talk publicly about how **rewarding** leadership is to you.
- Take newly active members **fishing** on local waters.
- Find out what they are **interested** in about TU.
- Discover what **skills** they have that might be valuable.
- Tell them they can **make a difference** in your chapter.

Inspiring Future Leadership



To **NOT** attract new leadership, do any of the following:

- Do the **same thing** year-after-year... on a Tuesday night at 7:30!
- Send out **no communications** since “everyone knows” the meeting time.
- When a new person walks in **stop and stare** at them, then return to your conversation with your friends in the chapter.
- Talk publicly about how **frustrating** leadership is and how burned out everyone on the board is that “no one will step up”.
- Only go **fishing alone** or with your current fishing buddy.

California Members *(Total survey responses = 660)*

Are you interested in serving in a chapter leadership position?	Age: 18-35	Age: 36-55	Age: 56-65	Age: 66-75	Age: 76+
Yes	33%	16%	10%	12%	4%

New York Members *(Total survey responses = 570)*

Are you interested in serving in a chapter leadership position?	Age: 18-35	Age: 36-55	Age: 56-65	Age: 66-75	Age: 76+
Yes	29%	16%	14%	14%	6%

Oregon Members *(Total survey responses = 306)*

Are you interested in serving in a chapter leadership position?	Age: 18-35	Age: 36-55	Age: 56-65	Age: 66-75	Age: 76+
Yes	31%	20%	19%	13%	0%

Inspiring Future Leadership – Ryan Lynch



Meet Ryan Lynch

White male - Age 33

Skill sets:

- Commodities trading
- Social Media & Communications
- Hospitality
- Board Leadership

Interests:

- Fly Fishing
- Conservation
- Youth Education





























Inspiring Future Leadership – Ryan Lynch



Secondary Chapter Membership Chair

Ryan Lynch

417486792

Norwalk



Building Effective Leadership



You've inspired and engaged new members, now you have to get them to agree to **take the next step** and become a leader.

- Set up a **nominating committee**
- Understand the **barriers** that prevent them from stepping forward.
- Set **clear expectations** of your leadership roles and responsibilities.
- Match the needs to the **skill sets and interests** of the prospects.
- Find an **entry level task** to help them grow into the role.
- Make an **in-person ask** for their help.

XYZ CHAPTER BOARD PROSPECT MATRIX		
DESIRED SKILLS SETS		
	<u>CONFIRMED COMMITTEE MEMBERS</u>	<u>POTENTIAL FUTURE COMMITTEE MEMBERS</u>
<u>GOVERNANCE/ FINANCE</u>		
Non-Profit Management		Jonnie Doe
Visionary/Strategic Thinking	Jane Smith; Joe Smith	
Accounting/Finance		
<u>DEVELOPMENT/ MARKETING</u>		
Marketing	Joe Smith	
Communications		
Events Coordination		Jannie Doe
Fundraising: Corporate	Joe Smith	
Fundraising: Foundation Grants		Jannie Doe
Fudraising: Donor Relations/ Individual	Jane Smith	
<u>PROGRAM</u>		
Chapter Historical Perspective		
Collaboration/Partnerships		Jannie Doe
Advocacy		
Biologist/ Ichthyologist		Jannie Doe
Fish and Game Agency Rep	Joe Smith	
Educator	Jane Smith	
<u>UNDER REPRESENTED DEMOGRAPHICS</u>		
Women		
Under 40		
People of Color		
Veteran		

Recruit the Right Leaders: *Screen, Interview, Match*



1. Identify what skills and diversity needs to make a balanced, well rounded board.
2. Maintain an up-to-date list of potential board candidates, including the particular skills they can bring to the chapter.
3. Vet potential candidates for any potential conflicts of interest and in terms of their chemistry interacting with other leaders/ members.
4. After determining who should be pursued, the chapter president should meet with prospective board member(s) to invite them to a chapter meeting, describe the chapter, and share the strategic plan as well as a board member job description.

What Stops TU Members from Accepting Leadership Roles?



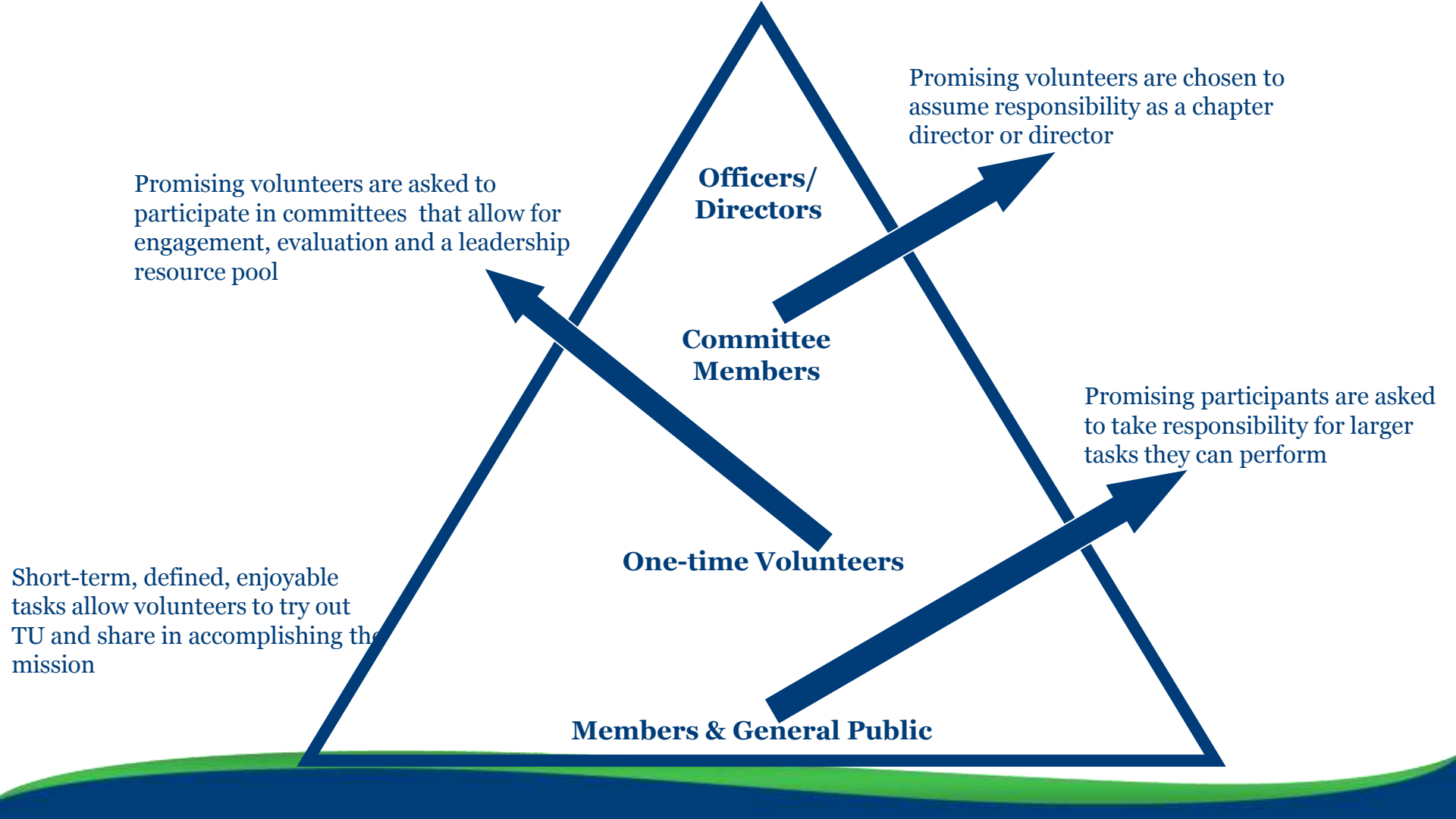
- Fear of commitment.
- Doesn't sound exciting.
- Insecure about skills.
- 'Old guard' unfriendly to newcomers/
too exclusive.
- Lack of understanding of programs/
unclear, general goals.
- They've watched others burn-out/ don't know how much time it will take/ not enough
time.



Remove Barriers

- Create clearly defined and consistently practiced board roles & responsibilities
- Set expectations for board, committee and event volunteers
- Explain time commitments
- Clarify what success looks like
- Hold volunteers accountable
- Make new volunteers comfortable. Designate a volunteer greeter at meetings.





Practicing Effective Leadership



To build and sustain a chapter or council, you must **model leadership** that drives growth, community and teamwork.

- Know your personal **motivation** for why you are a leader.
- Understand the **goals** you hope to achieve in your time as a leader.
- In order to **command respect** you must be respectful of your team.
- To achieve results, **create a culture** of participation and buy-in.
- Embrace **constructive conflict** and diversity of opinions.

What is a Strong Leader?



... And what do leadership styles have to do with it?

- Top-down leadership
- Participative leadership
- Delegative leadership



Purposefully Creating Culture



Build orientation and training into your culture

Build work hard/ play hard into your culture

Build a respect for people's time and holding people accountable into your culture

Build a welcoming and inclusive atmosphere into your culture

Build planning – and working a plan – a part of your culture

Running a Productive Meeting

- Inclusion/Atmosphere
- Bylaws Adherence/ Robert's Rules of Order
- Decision-Making
- An Agenda/ Preparation
- Facilitation
- Time/Attendance

Tips for Running Effective Meetings

Email an agenda 24 hours in advance.	Arrive 5 minutes early	Start and end on time. 
Come prepared.		
Share all relevant data. 	No smartphones.	Bring paper and a pen. 
	Stay on topic.	No interrupting.
	Be brief and concise. 	Silence = agreement
No side conversations or comments	Disagree without being disagreeable	Challenge ideas rather than people.
	Everyone participates. 	
Follow-up by email within 24 hours. 		

Constructive Conflict



Leaders that fear conflict or who allow less than constructive conflict...

- Have boring meetings
- Create environments where back-channel politics thrive
- Ignore controversial topics that are critical to mission success
- Fail to tap into all board member's opinions and perspectives

Leaders that engage in constructive conflict...

- Have lively, interesting meetings
- Board members give one another the benefit of the doubt before arriving at a negative conclusion
- Board members take risks in offering feedback and assistance

Sustaining Effective Leadership



Even a strong chapter or council can quickly become a weak one if the leaders do not **focus on the future** and develop processes for sustainability.

- Clearly **define the roles** of everyone on the board and committees.
- Ensure the **pipeline of leaders** is full and the heir apparent is willing.
- Don't forget to **effusively thank** current leaders while always looking for future leaders to join the team.

Officer Succession Planning



The Role of Board Leadership -> Develop your replacement as your first task in the job

The Role of Officers -> If your VP isn't intending to step into the role of President, get a new VP

Role of Nominating Committee -> Keep a list of skills and diversity needed to make a well-rounded board; leadership experience should be a sought after

Electing Officers -> Take this process seriously, be open and transparent

Term Limits -> Adhere to them as they help avoid stagnation, undue concentration of power, or continuous inadequate leadership

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Your Currency as a Volunteer Leader is Appreciation



Leadership Voids & Crises



If your chapter or council is at the point where the veteran leaders are burnt out and there are **no clear candidates to step up**, the challenge is even greater.

1. Contact your council and Volunteer Operations staff for support
 - People are more likely to step up if they know they have this support
2. Analyze the job descriptions and expectations.
 - Divide the responsibilities. Consider creating a co-officer role.
3. Consider shortening the term lengths to make the commitment easier.
4. Send a broadcast communication out to the membership.
 - Be specific about the needs. Be positive about the opportunity.
5. As a last resort, ask the present officer to extend their term by one year.
 - Commit as a group to make Priority #1 recruiting new leaders.

Questions?

