

# Leadership Development



Beverly Smith  
Vice President for Volunteer Operations

Lisa Beranek  
Leadership Development Manager

# Session Goals



In today's session, we will:

- Introduce leadership development
- Focus on leadership recruitment
- Share resources
- Encourage next steps

“Leadership is not about being in charge. Leadership is about taking care of those in your charge.”—Simon Sinek

# Leadership Status



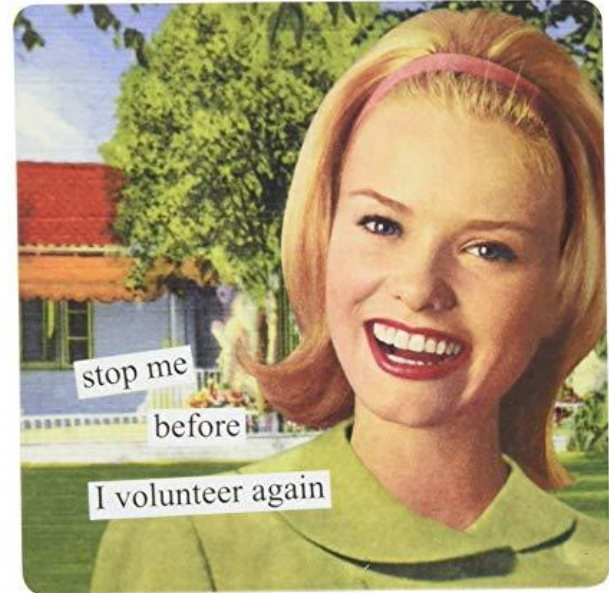
## Current Executive Committee

Position	Name	Term	Eligibility	Interest	Notes
Example: Treasurer	Sam Smith	1/2018-2/2020	Eligible for second term	Low interest in another term	Great job overall; low record keeping focus
President	Pat Jones	1/2018-2/2020	Ineligible for a term	Interest in a board role	Great leadership; Lead a committee or mentor
Vice President	Kim Dao	1/2018-2/2020	Eligible for a second term	High interest in Presidency	Great job overall; interest in a co-chair
Secretary	Max Johnson	1/2018-2/2020	Ineligible for a term	Low interest in a board role	Consider joining committee as a member
Treasurer	Maria Alba	1/2018-2/2020	Eligible for a second term	No interest in another term	Moving out of area in 2020

## Current Board of Directors

Position	Name	Term	Eligibility	Interest	Notes
Board Member 1:	Ravin Swan	1/2017-2/2019	Eligible for a second term	Low interest in another term	Family obligations
Board Member 2:	Janice Miller	1/2017-2/2020	Eligible for a second term	Interest in Executive role	Secretary in 2019
Financial Reviewer	Jesse Miller	1/2018-2/2019	Ineligible for a term	Interest in Executive role	Treasurer in 2020

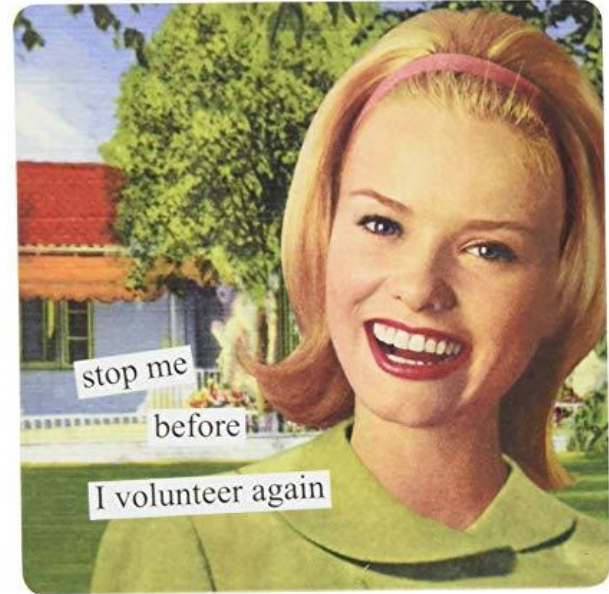
# Leadership Barriers



# Leadership Barriers

Common barriers to members stepping into a leadership role include:

- Leadership does not reflect them
- Unaware of leadership opportunities
- Current leadership is unwelcoming
- Sounds unappealing
- Lack of understanding
- Fear of commitment
- Skill or experience insecurity

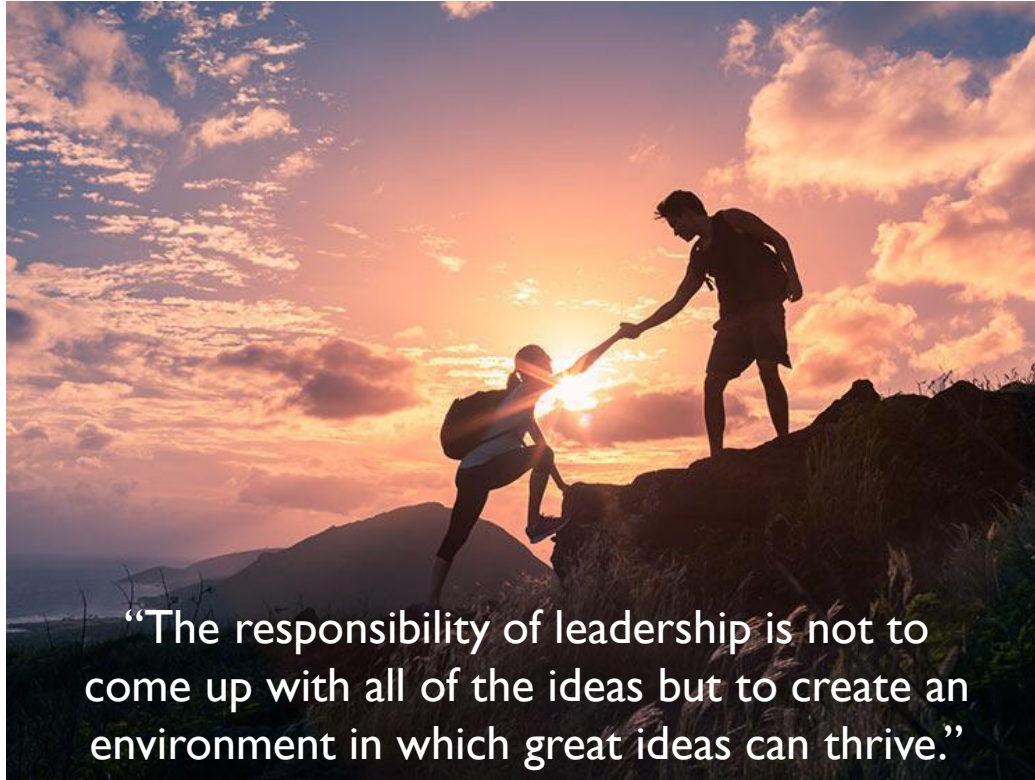




# Creating a Leadership Environment



# Cultivate a Leadership Environment

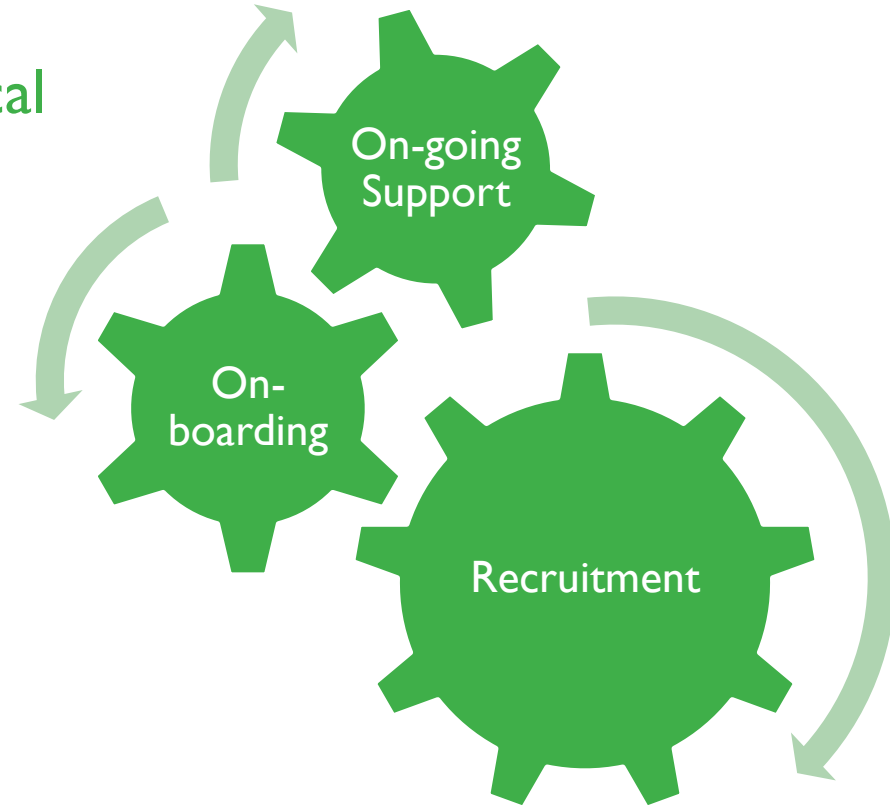


“The responsibility of leadership is not to come up with all of the ideas but to create an environment in which great ideas can thrive.”

# Foster Leadership

To set a leadership tone, it is critical to:

- Address leadership barriers
- Be intentional
- Invest in continued efforts
- Customize a strategy
- Take an all-in, team approach





# Leadership Ladder In Practice



# Leadership Ladder

Be aware that leadership is a team sport:

- Multiple steps to fostering leadership
- Identify the right person for the role
- Invest early and often in leaders
- Be willing to create space for leaders
- Two-way communication is critical
- Build recognition into efforts

A supported leader is a great recruiter

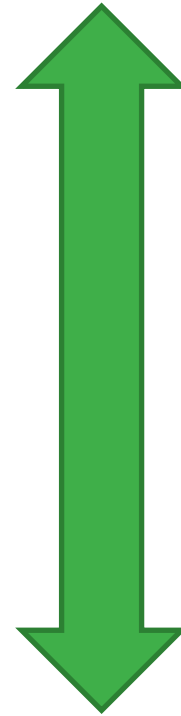


# Community Profile

Community profile is an important aspect of leadership recruitment.

- How familiar are strangers with your efforts? Members?
- How can you raise your profile?

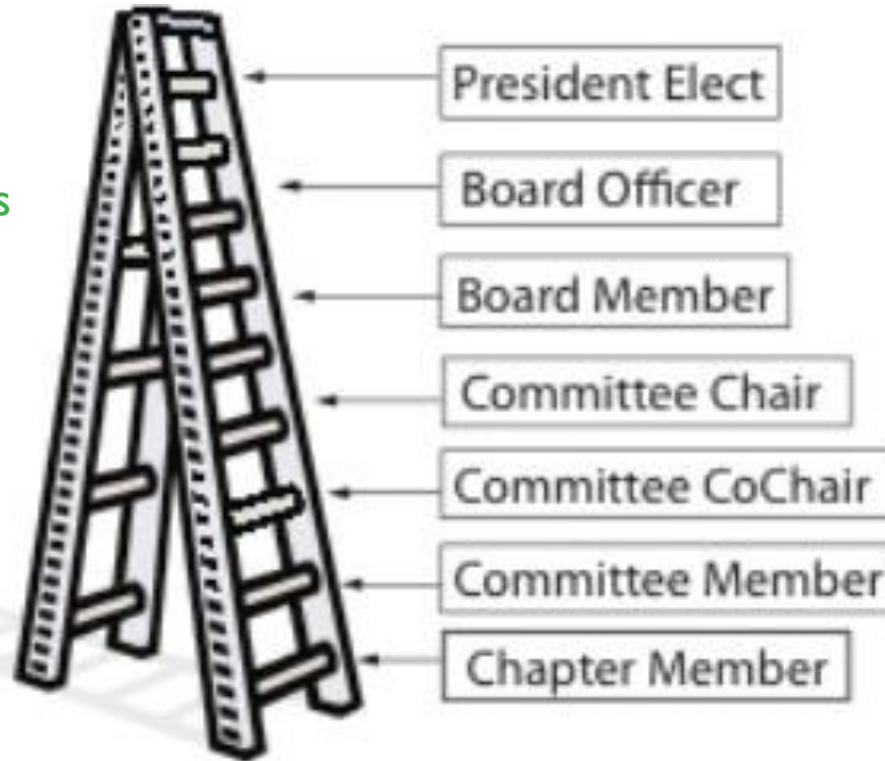
Bringing in 100 members is likely to result in a few leaders with a plan



# Leadership Ladder In Practice

Longer duration,  
formal commitments  
and responsibilities

Short term, low  
commitment  
responsibilities



# Planning for Success





# Draft a Recruitment Plan



Once you have a better understanding of the board's goals and areas to address, draft a written plan.

You will want to include:

- Timeline
- Action items
- Targets
- Assigned tasks

“Failing to plan is planning to fail.”

# Recruitment Plan



## Between now and next BOD Mtg:

- Request current board discuss what leadership positions need filling
  - Review/update position descriptions
    - Provide a copy to the recruitment committee
  - **Draft a list of potential leaders** and provide to the committee for consideration
- Leadership Recruitment Committee to meet and work on:
  - Chair to organize first meeting
  - Review and update current position descriptions
  - Discuss ideal characteristics and skills for open positions
  - List known potentials (may include current chapter members and/or like-minded coldwater advocates in the community that are currently NOT chapter members)

## BOD Mtg #2 (Date: \_\_\_\_\_)

- Schedule agenda time for recruitment updates
- Recruitment Committee update
  - Share priority characteristics and skills for executive positions (if any), have the board prioritize them (discussion, sticker voting)
  - Update BOD on potential nominee list and request any additions
    - Gauge if there are any potentials listed that warrant a meeting (coffee?) with a committee member to gauge interest of joining a committee and/or the board (schedule meeting between potential and committee member between now and next BOD mtg)

## BOD Mtg #3 (Date: \_\_\_\_\_)

- Schedule agenda time for recruitment updates
- Recruitment Committee update
  - Update BOD on potential nominee list and request any additions

# Talent Prospecting



# Create a Committee



A committee can be the cornerstone to an effective recruitment process.

Committee responsibilities may include:

- Communicating with the board
- Developing and maintaining an ongoing roster of potential leaders
- Recording the development of potential leaders
- Recommending best path forward for asks

# Understand Leadership Needs



Discuss immediate and long-term targeted needs with your board to guide the committee's recruitment efforts.

Gain a better understanding of the following needs in terms of:

- Skills
- Expertise
- Experience/perspective
- Community representation



# Understand Leadership Needs



Attributes to consider include:

- Mission dedication
- Relevant board or nonprofit experience
- Relationships (e.g. agency ties)
- Skills: legal, accounting, fundraising, marketing, etc.
- Age
- Gender
- Ethnicity

# Understand Leadership Needs



## Leadership Recruitment Roster

To effectively build leaders, a current leadership team must recognize recruiting and building future leaders is everyone's responsibility. Each leader must be on the lookout for potential leaders to fill forecasted and unanticipated leadership needs. Looking ahead one to two years and engaging potential leaders in lower risk leadership asks, can help build future leaders that are primed for a larger role and more likely to accept.



Position	Candidate #1	Candidate #2	Candidate #3	Candidate #4	Notes
President	Sam Smith	Janice Ford	Olivia Martinez		
Vice President	Sam Smith	Janice Ford	Olivia Martinez		
Secretary	Zach O'Conner	Terrence Johnson			
Treasurer	Michelle Garner	Kim Nguyen	Steve Bocci		
Board Member 1	Candace Moore	Ezekial Roberts	Shaylene Kemp		
Board Member 2	Jackie Melvin	John Ashbury	Usaf Kahling		
Financial Reviewer	Michelle Garner	Kim Nguyen	Steve Bocci		

# Prepare Recruitment Resources



Finalize recruitment materials to empower your search, clearly communicate roles and demonstrate your level of organization.

Recruitment packets often include:

- Role specific description
- Strategic plan
- Transition plan
- Upcoming events

# On- Boarding



# Welcome & Orientation



Set new leaders up for success:

- Welcome leaders with an orientation
- Provide an orientation packet (Strategic plan, position description, board contact list, Leadership Manual, etc.)
- Invite potential leaders to trainings/meetings
- Encourage lesser heard voices and questions
- Share your leadership story
- Facilitate a mentor/mentee relationship
- Check-in often to answer questions and gauge status



# Continued Support



# Continued Support



Empower leaders by investing for the long-term:

- Check-in to update goals and status
- Encourage their participation in goal related activities
- Celebrate their successes
- Fund their professional development
- Invite leaders to advanced trainings
- Encourage attendance at developmental meetings
- Facilitate a mentor/mentee relationship
- Update your leadership roster with their interest



# Emergency Leadership Needs



# Leadership Adjustment



A plan can facilitate the process when your team is faced with a leader that is not a good fit for their current role including:

- Discuss their status
- Highlight their legacy
- Focus on the role, not the person
- Celebrate their contribution
- Shift leadership role

# Emergency Leadership Recruitment



A plan can facilitate the process for an unanticipated need:

- Debrief with outgoing leader
- Discuss leadership needs and plan
- Organize recruitment materials
- Review potential leader roster for fit
- Assess current leadership team for potential
- Identify potential leaders and gauge interest
- Discuss role modification (co-chair, interim leader or term extension)
- Be honest



# Resources



Additional templates and trainings to support your efforts can be found in the following:

- TU Leadership Manual
- Tacklebox
- TU Webinar Recordings
  - President's Forum
  - Building Your Board
  - Maximizing Your Leadership Team
- Council Leadership
- Volunteer Operations Staff

# Council Support



Your council may provide support in the following ways:

- Help your team identify leadership barriers
- Empower chapters to develop succession plans
- Facilitate your leadership recruitment process
- Provide recruitment plan accountability
- Offer resources (e.g. regional volunteer coordinator, orientation planning, coaching)
- Connect your team with other chapters



Questions?



How Will  
You Bring  
This Back?





A close-up photograph of a hand holding a small, colorful fish over a stream of water with many bubbles. The background is dark and out of focus, showing more bubbles and the hand holding the fish. The fish is small, with a yellowish body and a pinkish-red head. The water is dark, and there are many small, clear bubbles rising from the bottom. The hand is visible at the top, holding the fish. The overall scene is bright and lively, with a focus on the fish and the water.

**Thank You!**

**Beverly Smith**

Vice President for Volunteer Operations

[Beverly.Smith@tu.org](mailto:Beverly.Smith@tu.org)

**Lisa Beranek**

Leadership Development Manager

[Lisa.Beranek@tu.org](mailto:Lisa.Beranek@tu.org)