



# **Building a Diverse and Robust Bench of Volunteer Leaders**

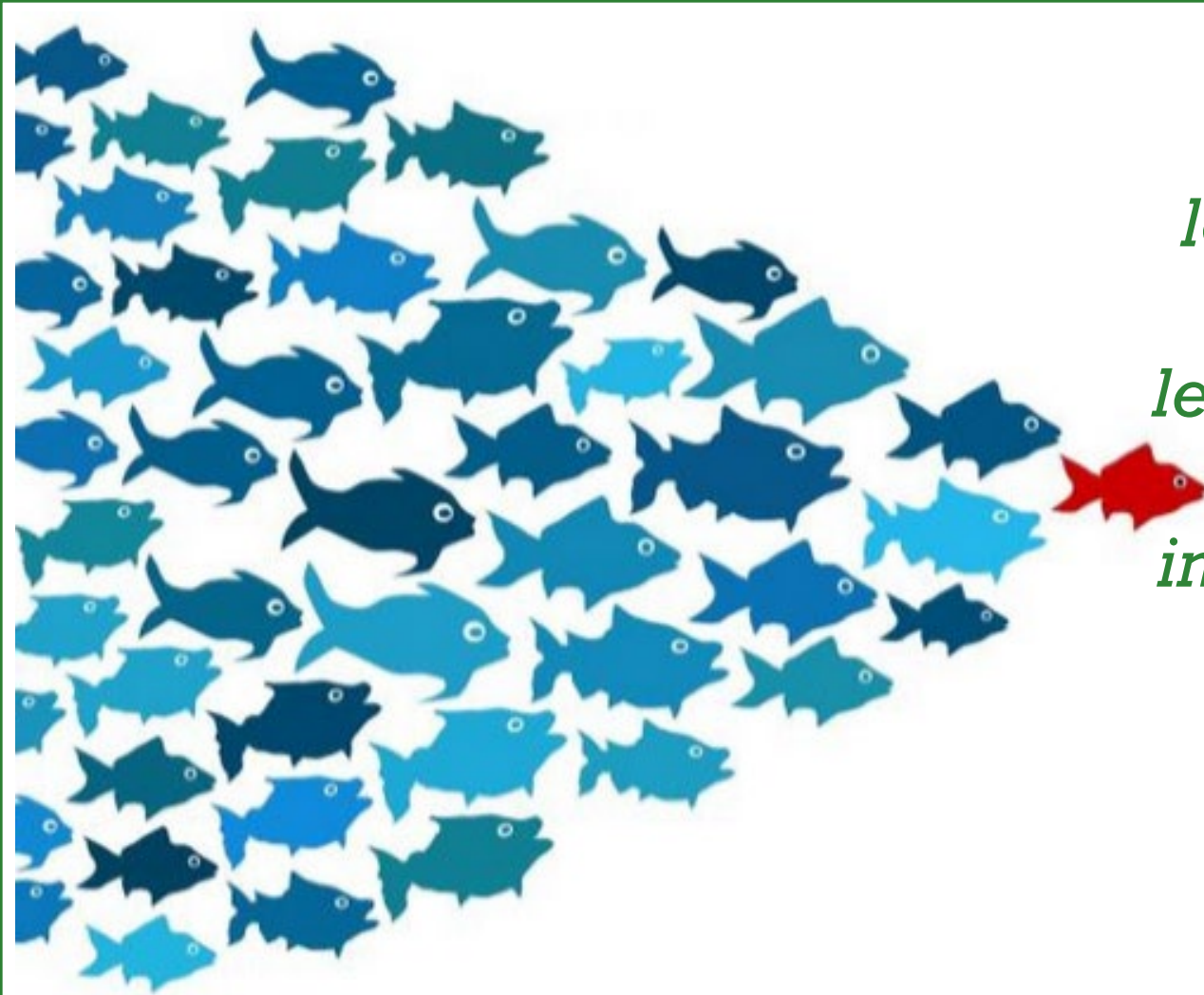
**2024 | Regional Rendezvous**

# Learning Objectives

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- ✎ Learn the critical ingredients of succession planning and board operations.
- ✎ Identify practices high-functioning boards use and explore areas your chapter/council can strengthen.
- ✎ Find answers to your questions about succession planning and gain practical information and tools you can use.



*The quality of leadership and the depth of that leadership bench is one of the most important factors in predicting the success and sustainability of a TU chapter.*

# No Silver Bullet

*While there is not one formula for building a diverse and robust chapter leadership, there are elements and processes that most effective chapter leaders have in common.*



# Traits of Boards with a Waitlist *(yes, really!)*

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- ✍ A strategic approach to leadership skill and diversity recruitment oriented to achieve chapter goals
- ✍ Intentional structure, organization and ongoing support
- ✍ Thoughtful officer and director selection and composition
- ✍ Welcoming, inclusive communications and culture

# Leadership: A Strategic Approach



## TROUT UNLIMITED 2021-2026 STRATEGIC PLAN SUMMARY

### INTRODUCTION

Healthy fish rely on healthy water. We all do.

Today, 1.5 million miles of trout and salmon waters in America are degraded. These fish are imperiled species whose loss reflects the declining health of lands and waters on which we all depend. These waters are not only home to iconic native and wild fish. They are also the very same rivers and streams that supply the water we drink, irrigation for our lands, and endless opportunities to get outside and connect with nature. For anglers, they are prized places, but they matter to all of us.

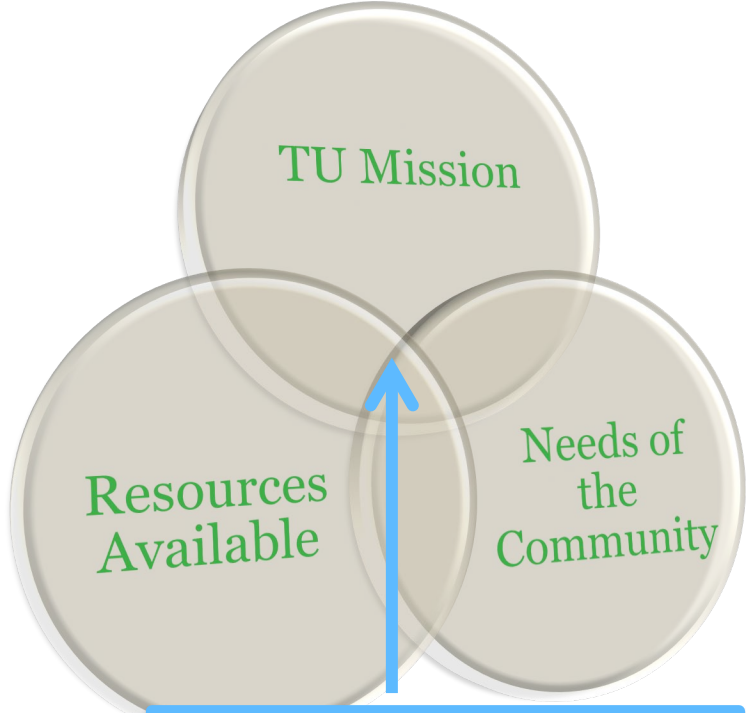
Climate change poses real and immediate threats. Warming waters, drought, wildfires, and extreme flooding degrade important streams and rivers. These are systemic threats requiring equally comprehensive and integrated responses. If we are to deliver solutions that match the complexity of the challenges we face, TU and our partners must scale up our work.

We remain hopeful. There is still time to stem the losses if we work together and expand our efforts to recover and heal these waters and the places we love.

## OUR GOALS

1. Identify a national network of shared priority waters for native and wild trout and salmon, and take strategic action to care for and recover them.
2. Inspire a diverse corps of staff, volunteers, and partners to advocate for and participate in the care and recovery of our lands and waters.
3. Invest in systems and people—staff, volunteers, and partners—so we have the tools, technology, training, and resources necessary to achieve our shared goals.

# Strategic Plans



Where chapter strategic plans are made

**Communications**

## Conservation Plan

*Protect,  
Reconnect,  
Restore*

**\$ & Volunteers**

**Engagement**

# Why Members Don't Accept Leadership Roles



- ✎ Fear of commitment
- ✎ Doesn't sound exciting
- ✎ Insecure about skills
- ✎ 'Old guard' unfriendly to newcomers
- ✎ New ideas are not fostered and supported
- ✎ Lack of understanding of programs
- ✎ Unclear chapter goals
- ✎ They have watched others burn-out





# Remove Barriers to Leadership



- ✎ Create clearly defined and consistently practiced board roles & responsibilities
- ✎ Set expectations for board, committee and special event volunteers
- ✎ Explain time commitments
- ✎ Clarify what success looks like
- ✎ Make new volunteers comfortable
- ✎ Model supporting new ideas



# The Importance of Committees

Promising volunteers are asked to participate in committees that allow for further engagement, evaluation, and a leadership resource pool

Members and nonmember participants are engaged by leadership, educated on TU, and asked about their interests.



Promising volunteers are chosen to assume responsibility as a chapter director or director

Short-term, defined, enjoyable tasks allow volunteers to try out TU and share in accomplishing the mission

# Be Tactical: Define Specific Tasks



- ✎ Have a plan. Don't let someone slip away because at the time they offered to help, you did not have something for them to do. Keep a list of things that people can always do.
- ✎ Keep it simple at first. And provide opportunities with varying levels of responsibility.
- ✎ People are more likely to say “yes” when they understand the potential rewards.
- ✎ Create volunteer leader job descriptions (see examples in TU's Leadership Manual.)

# Delegate & Invest Time



- ✍ Invite a volunteer to sit on a committee.
- ✍ Set up a support system within the chapter for mentoring new leaders.
- ✍ Consider taking an item from your to-do list today and finding a capable volunteer to take it over.
- ✍ Provide recognition and feedback. Do this meaningfully—recognize that it's the person's first time helping out your chapter.
- ✍ Aside from a formal thank you, volunteers feel appreciated when folks pull them aside and thank them personally.

# Who Are Our Target Audiences?



- 🍃 Guides
- 🍃 Students
- 🍃 Restoration Specialists
- 🍃 Accountants
- 🍃 Lawyers
- 🍃 Retirees
- 🍃 Biologists
- 🍃 Fundraisers
- 🍃 Event Organizers
- 🍃 Educators
- 🍃 Veterans

# TIP: Appoint a Nominating Committee



Make sure geographic, age, gender and race / ethnicity diversity is a priority for your chapter or council's nominating committee.

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

# Recruit the Right Leaders



- 🐟 Screen
- 🐟 Interview
- 🐟 Match
- 🐟 Mentor
- 🐟 Grow
- 🐟 Repeat

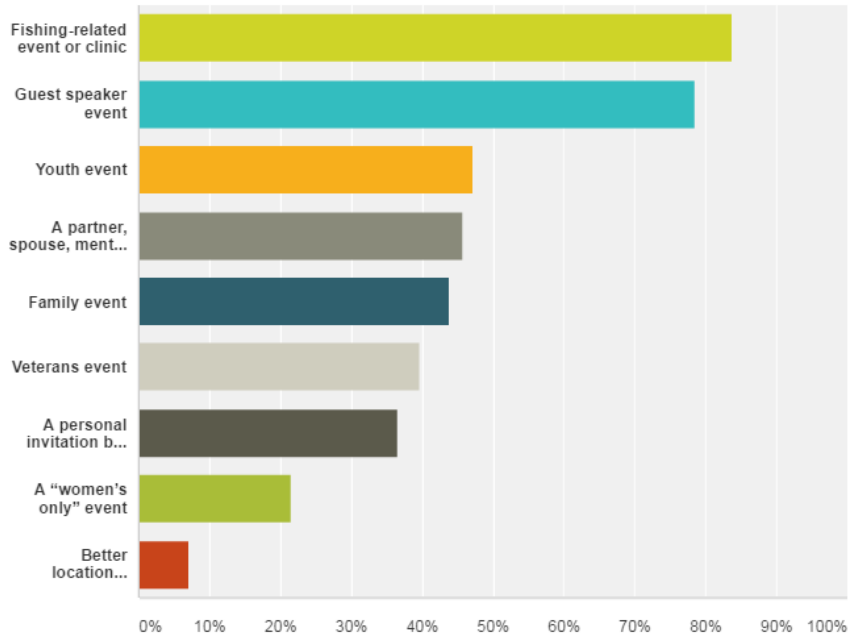


# TIP: Survey Members



Of the options below, which of these typical TU events would you attend? Please select all that apply.

Answered: 265 Skipped: 6



What other things would encourage you to attend a local Trout Unlimited chapter event?

Answered: 113 Skipped: 158

Responses (113) | Text Analysis | My Categories (0)

Categorize as... | Filter by Category | Search responses

Showing 113 responses

- More conservation projects.  
4/11/2016 2:37 PM [View respondent's answers](#) [Categorize as...](#)
- Volunteer work, educational or hands on meetings, group fishing outings  
4/11/2016 1:01 PM [View respondent's answers](#) [Categorize as...](#)
- An email of upcoming events.  
4/11/2016 12:32 PM [View respondent's answers](#) [Categorize as...](#)
- Conservation and stewardship event; Attended a climate change event where TU was represented on panel with Lakes Environmental Association, Loon Echo Land Trust, Senator Angus King - multiple community partnership events: TU rep made some of best comments regarding involving youth & women (fishing was secondary)  
4/8/2016 10:15 AM [View respondent's answers](#) [Categorize as...](#)
- Fundraiser  
4/6/2016 9:03 PM [View respondent's answers](#) [Categorize as...](#)
- maybe any contact by a chapter member?  
4/5/2016 6:33 PM [View respondent's answers](#) [Categorize as...](#)



## 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	33.33%	15.71%	9.50%	11.73%	3.85%

## Washington Members *(Total survey responses = 258)*

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	6.67%	20.75%	10.61%	16.67%	15.79%

## 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	30.77%	20.34%	18.52%	12.86%	0%

# Implement a Strategic Leadership & Diversity Plan



- ✦ Review the chapter and council specific job descriptions in TU Volunteer Leadership Manual and assign a point person to certain roles.
- ✦ Orient chapter leadership with the resources out there in the Tacklebox, particularly at [tu.org/women](http://tu.org/women); [tu.org/headwaters](http://tu.org/headwaters); and [tu.org/veterans](http://tu.org/veterans).
- ✦ Make sure that your chapter budgets appropriately for success.
- ✦ Find partners in your community to work with to accomplish your recruitment and diversity goals.

# Board Succession Planning



- ✦ **The Role of Board Leadership** -> Identify and inspire your replacements
- ✦ **The Role of Officers** -> Lead by example and model expectations of activity and effort. Learn and grow to take on new roles, be the face of the chapter in the community.
- ✦ **Role of Nominating Committee** -> Keep a list of skill sets and diverse perspectives needed to make a well-rounded board. Maintain list of specific persons expressing interest in leadership.
- ✦ **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. Also helps prevent current directors and officers from burning out.

# Purposefully Create Culture

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- ✦ 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

# Run a Productive Meeting

- ✦ Develop an Agenda in Advance
- ✦ Share Written Reports
- ✦ Create an Inclusive Atmosphere
- ✦ Remove Inherent Power Dynamics
- ✦ Set Time & Attendance Expectations
- ✦ Proactively Facilitate Conversation
- ✦ Foster Constructive Conflict
- ✦ Make Decisions
- ✦ Adhere to Bylaws
- ✦ Follow Robert's Rules of Order

## Tips for Running Effective Meetings

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

# Your Currency is Appreciation



# TOOL: Board Assessment Checklist



## Internal Board Operations Assessment

Use the scale below to indicate how each statement applies to your board. *Note: the assessment is geared towards chapters; however, many questions will be applicable on the council level too.*

3 = Usually

2 = Sometimes

1 = Rarely

\_\_\_ 1. Board members are passionate and unguarded in their discussion of issues and call out one another's unproductive behaviors when it occurs.

\_\_\_ 2. The board has active committees (e.g., fundraising, nominating, long-range planning) with specific responsibilities.

\_\_\_ 3. The chapter provides an orientation for new board members.

\_\_\_ 4. Board members have the combination of skills (e.g., fundraising, management, legal, fiscal, etc.) that complement the strategic priorities of the chapter.

\_\_\_ 5. There are regularly scheduled board meetings at least four times a year.

\_\_\_ 6. The board is representative of its membership and more broadly the fly fishing demographic with regard to race, class, gender, etc...

\_\_\_ 7. Board meetings are compelling and fun.

\_\_\_ 8. The chapter supplies a packet of information to all board members that includes, but is not limited to, the TU national leadership manual, descriptions of current programs, a list of board members, budget and funding information, and bylaws.

\_\_\_ 9. The strategic plan is reviewed annually, if not more frequently.

# TOOL: Board Assessment Checklist



- \_\_\_ 10. During board meetings, the most important - and difficult - issues are put on the table to be resolved.
- \_\_\_ 11. Board members follow through on their commitments in a timely manner.
- \_\_\_ 12. The organization develops future board members through the use of volunteers on committees.
- \_\_\_ 13. All board members understand their fiduciary responsibility, liability limitations and the restrictions associated with TU's 501c3.
- \_\_\_ 14. Board meetings begin and end on time per an agreed-upon schedule, and there is adequate preparation and distribution of material, including agendas, in advance meetings.
- \_\_\_ 15. The chapter has established community assessment and member feedback processes.

## Scoring

Combine your scores for the preceding statements as indicated below.

Function 1: Selection and Composition	Function 3: Orientation and Training	Function 4: Structure and Organization	Function 2: Constructive Conflict	Function 5: Accountability
Statement 4: ___	Statement 3: ___	Statement 2: ___	Statement 1: ___	Statement 9: ___
Statement 6: ___	Statement 8: ___	Statement 5: ___	Statement 7: ___	Statement 11: ___
Statement 12: ___	Statement 13: ___	Statement 14: ___	Statement 10: ___	Statement 15: ___
Total: ___	Total: ___	Total: ___	Total: ___	Total: ___

A score of 8 or 9 → a probable indication that the function is not a problem for your board

A score of 6 or 7 → indicates that the function could be a problem

A score of 3 to 5 → probably an indication that there is dysfunction that needs to be addressed



# Questions?

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