

FIVE STEPS TO LEADERSHIP SUCCESS(ION)

A workshop for Chapter leaders

Presented by
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at the North Country Trail Association Celebration
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The resources in this packet were originally developed as part of a workbook in support of virtual training for leaders of NCTA Chapters. A live zoom training was held in October 2021, and recorded webinars with the same material are available on the NCTA website. The materials and training were developed by consultant Amy Stork (www.AmyStork.com).

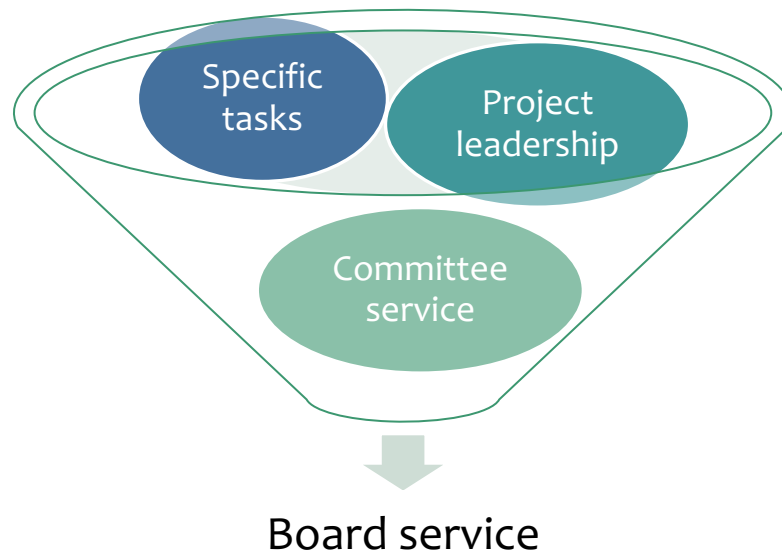
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Leadership Recruitment Overview

- 1. Discuss recruitment goals before recruiting.**

Discuss who you want and need on the leadership team before individuals begin asking others to join. Never tell someone they need to “replace themselves” to leave their role.
- 2. Don’t start from scratch – build a leadership funnel.**

You want to avoid “cold calling” people to be on your board or leadership team. Always be thinking about building leadership in the organization, before you *need someone right now* in key roles. Recruit people to do tasks, take on projects, or serve on committees. Then you will know who’s going to be a great leader, and they will feel excited and committed to Chapter leadership.



- 3. Don’t settle for “a warm body”.**

Even when it is hard to find leaders, commit to being strategic about who you bring on to the group. If someone is enthusiastic, but not a fit for the leadership role or can’t commit, find another way for them to serve. When you bring on leaders who aren’t consistently available to attend meetings or can’t commit to the between-meetings work, it makes it hard to form a cohesive team.
- 4. Provide clarity.**

If you’re recruiting someone to a leadership role, be up front about it. Tell them you’d like to meet to discuss leadership service, and have a job description ready. If they are interested, go over it in detail so they understand what would be expected. Be clear about opportunities to observe the team before being formally nominated, or to serve in other capacities if they cannot make a leadership-level commitment. Let them know the process for joining.

Tips for Optimal Board / Leadership Council Operations

Clear expectations

- Establish the duties of the board / council.
- Evaluate the board / council every year.
- Have board / council member and officer job descriptions and follow them.

Meetings that work

- Don't leave things to chance. Build an agenda that includes reasonable timeframes for both regular business and special discussions.
- The role of the President really matters, particularly when it comes to:
 - ◆ Putting together the agenda
 - ◆ Keeping discussions on track
 - ◆ Ensuring everyone gets a chance to speak
 - ◆ Dealing with problems on the board / council

Effective committees

- Understand the role of committees. They are there to help the board / council get the work done.
- Every committee should have a charter that says what it is trying to accomplish.
- Committees don't make decisions for the board / council, unless the board / council *delegates* operational authority to a committee in a specific realm.
- Establish standing committees of the board / council, particularly:
 - ◆ Finance committee / budget committee
 - ◆ Leadership development committee
- Assign Ad-Hoc committees of the board / council as needed, for example:
 - ◆ Strategic planning committee (when needed)
 - ◆ Event or special project committees
- Develop other committees as needed – it can be a great way to build leadership.
- Honor the work of the committee. If the board / council delegates work so that it can be done efficiently, the full board / council should concentrate on goals and results – not the methods by which the committee achieves the goals.

Tips for supporting a Healthy Board Culture

Adapted from Solid Ground Consulting www.SolidGroundConsulting.org

The following best practices are based on many collective years of experience with Boards of Directors, Councils, Commissions, and other governing bodies. Of course, every group is unique, and each should discuss and adopt its own guidelines. Other than legal matters, most questions have no “right” or “wrong” answers, but it is important that board / council members have the same expectations. It is helpful to review and revise guidelines at least annually.

Expectations and Courtesies

- Make every effort to attend every meeting, to arrive on time, and to be prepared.
- Do not criticize any board / council member, staff member, partner, etc. in public.
- No surprises: Whenever possible, inform others before they learn important news.
- Speak only when recognized by the chair / president, unless as a group you have decided that meetings should be run in another manner.
- Don't interrupt or engage in side conversations when another person is speaking.
- Be brief and to the point. Limit speeches; don't posture or grandstand.
- Clearly explain how you got to your position and how it serves the organizational interest. This is especially important when you disagree with someone else.
- Share credit generously. Spread opportunities to get positive recognition.
- Support the legitimacy of group decisions, even those you didn't vote for.
- Once a decision is made, move on.

Support Effective Relationships

- Respect the different styles of fellow board / council members.
- Be open to changing your mind based on new information.
- Maintain your independence. Do not allow yourself to be seen as a member of a bloc.
- Take personal responsibility for encouraging respectful behavior among group members.
- Strive for consensus, but don't settle for the lowest common denominator. When you have exhausted all avenues of agreement, accept that divided votes are simply part of the process.
- If you have a concern with another member, speak directly to that person.
- Be open with sharing information. Give others information you would want them to give you.
- Pick your battles. Let others win on matters important to them and less important to you.
- Everyone does not have to weigh in on every question. Sometimes it's OK to just vote.
- When a discussion grinds, you might suggest taking a break.

- In general, praise people in public and criticize in private.
- Avoid using written communications to express anger, serious disagreement, or other difficult emotions. Whenever you put anything in writing, keep in mind that someone other than your intended recipient may someday read the communication; choose your words accordingly.
- Spend some casual time together to have fun and build trust.

LEADERSHIP RESOURCE: Leader Attributes Worksheet

<i>Tailor the categories below to the needs of your organization. First complete the matrix for each current board / council member, then identify gaps and needs.</i>	Current member #1	Current member #2	Current member #3	Current member #4	Current member #5	Prospect #1	Prospect #2
Personal qualities							
Passion for the mission							
Leadership skills							
Team oriented							
Willing and available to work							
Good communicator							
Strategic							
Bridge-builder							
Expertise							
Administration/Management							
Finance							
Business							
Communications/Marketing							
Nonprofit board experience							
Technology							
Fundraising							
Legal							
Connections/Capacity							
Ability to contribute funds							
Community connections							
Access to funders/donors							
Reflecting our community							
Key user groups							
Geography							
Age							
Gender							
Race / ethnicity							

Adapted from BoardSource's *The Handbook of Nonprofit Governance* (2010)

Leadership Orientation/Training Ideas

Initial Orientation

- New leaders attend NCTA Chapter Leader orientation.
- Schedule a meeting between the new board / council member and the President, and anyone holding a previous position that might be filled by the new member, if applicable. Go through the materials listed here, or others, and answer any questions.
 1. Chapter Bylaws and Charter
 2. NCTA's Chapter Leadership Handbook and link to online resources center
 3. NCTA's Strategic Plan
 4. Latest Chapter financial report
 5. Latest Chapter membership report
 6. Any Committee charters and job descriptions
 7. Latest committee or program reports

Tips:

- The Secretary or someone else should be assigned to maintain these orientation materials. It's easiest to keep them in one place online: Google folder, Dropbox, etc.

First Three Months

- Immediately assign the new member to a committee. Ask the committee chair to ensure the member gets up to speed on committee business.
- Consider assigning a "mentor" – a longer-term leader to work with the new member for the first three months. The "mentor" checks in after each meeting to answer questions and help member become acquainted.
- President also checks in regularly with new leader to see how things are going.

Ongoing Training

- Provide opportunities for board / council leaders to attend special workshops related to the assignments and interest of the member.
- Expand responsibilities and rotate committee assignments to help satisfy the interests and needs of the leader. This has the added advantage of providing continuous development of volunteer leaders.

Leadership Recruitment Outreach Template

- Why does it work best to reach out directly to individuals to recruit new leaders?

- When you reach out to an individual and ask them to take on a task, project, or committee, what are the top three things you want to convey to them? Write your “pitch” here:
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- What are your ideas for additional outreach for the tasks, projects, or committees you identified? **Be specific –you are making a plan that you’ll want to be able to follow.**

Examples of outreach opportunities	Specific ideas / opportunities that we can access:
Events (our own or others) that are likely to be attended by our prospective leaders	
News media that are likely to reach our prospective leaders	
Social media accounts (our own or others) that are likely to reach our prospective leaders	
Partner organizations likely to have connections to our prospective leaders	
Businesses likely to have connections or be patronized by our prospective leaders	
(Other)	
(Other)	

LEADERSHIP RESOURCE: Creating a Leadership Funnel

- What kind of new leaders are we hoping for? (Skills, demographics, etc.)
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- Brainstorm a list of tasks, projects, and committees that 1) the chapter needs and 2) could attract the kind of people you hope to attract, as a starting point for leadership engagement.

Category	Task ideas	Project ideas	Committee ideas
Events or programs			
Communications and marketing			
Administration, finance, other “organizational” needs			
Public speaking or partnerships			
(Other)			
(Other)			