

# SUMMARY

## 2018 Spring Annual Meeting Chapter Leadership Summit

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### Theme: Year in the Life of a Chapter

Is planning for your IATA Chapters annual calendar frustrating, messy, and time-consuming? Can you make it exhilarating, invigorating and effortless? We will all share ideas that every Chapter can use. The short list of annual activities we might plan for might include hikes (first day hikes, full moon hikes, tyke hikes, etc.), trail maintenance and improvement days, corporation volunteer days, student volunteer days, outreach and community engagement, trail communities, corporate hikes, social events, fund-raising, chapter meetings, reporting & volunteer safety, dealing with technology (newsletters, social media, photo journalist), VIP reporting, budgets, and reporting requirements that we have for the IATA, DNR, and NPS. How do we manage, and how can we help each other become more efficient and proficient?

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Joanna Kramer Fanny (Lodi Chapter Coordinator; [lodivalleychapter.iata@gmail.com](mailto:lodivalleychapter.iata@gmail.com)) and Dennis James (Rock County Chapter Coordinator; [djames84@outlook.com](mailto:djames84@outlook.com)) would like to thank the presenters and participants of the 2018 Chapter Leadership Summit.

Below is a summary of each presenters' contribution to the morning, including their contact information. Any one of these snippets could have taken our three hours together, plus more. We encourage you to reach out to the presenters, to other Chapters, and/or to your Chapters for continued discussion and implementation of the processes, requirements and ideas shared.

### Annual Meeting Question

Every year at the Annual Meeting the questions arise about timing and location. This year was no different, and the record snows in mid-April made the question even more meaningful. Mike Wollmer ([mike@iceagetrail.org](mailto:mike@iceagetrail.org)) asked that we share this question with you: what ideas do you have on the timing of the Annual Meeting and Conference?

2019 years conference date and location are already set so this is a longer-term decision.

April 11 – 14, 2019; Wintergreen Resort, Wisconsin Dells

## A recap of the Volunteer Skills and Interest Inventory...looking beyond chapter members for help with your work

Eric Sherman, IATA Membership Coordinator, [eric@iceagetrail.org](mailto:eric@iceagetrail.org)

FINDING HELP Via the Volunteer Skills and Interests Inventory (VSII)

### Dennis Notes

- This is a great information resource. Eric suggested that we reach out to all new members in our Chapter with a personalized note (via mail) thanking them for joining and acknowledging their VSII selections.
- If current members haven't created an online IATA account and filled out the VSII, encourage them.
- Non-IATA members of a Chapter can also create an account and complete a VSII.
- In email client, create groups for different types of volunteer activities so that you can target based on volunteer interests.

### Where does VSII info come from?

- New members
- Current members
- Anyone else with an Alliance online account

**WELCOME GUY TEST-ACCOUNT (ACCOUNT# 275508)**

Thank you for your support of the Ice Age National Scenic Trail and Ice Age Trail Alliance!

Please use the "What would you like to do?" menu to view your account options.

What would you like to do? ▾

What would you like to do?

**View / Update My Profile**

Review / Renew My Membership

Make a General Donation / View History

Review / Register for Events

### What's in the VSII?

We ask about a wide range of skills and interests, including:

Trail maintenance	Property monitoring	Social media
Trail layout	Legal services	Photography
Trail (tread) construction	Advocacy/government relations	Videography
Heavy equipment (e.g., trail mower) operation	Adult education	Layout/graphic design
Chainsaw operation	Youth education	Creative writing
Power equipment maintenance	Geology and/or glaciology expertise	Informational writing
Woodworking	Other natural science expertise	Editing/proofreading
Rock work	Fundraising	Presentations (e.g., PowerPoint)
Landscape restoration	Public speaking	Data entry/Excel expertise
First aid/CPR	Meeting facilitation/moderation	Mailings prep (folding, stuffing)

Food preparation for large groups	GIS/GPS	"Gofer" (willing to help with various tasks...even mundane ones)
Event planning	Website design	

#### What's the magnitude?

- 230+ recipients, and counting
- Per our experience at HQ, these folks are excited to be asked to help!

#### How can I use this info?

Connect with your chapter's members...especially new ones

#### Use all VSII data to find help with a particular project

- Think beyond your borders!
- Reach out to a subset of VSII participants:
  - Trailwide members nearby w/ interest in trail maintenance?
  - Starting a Facebook page
  - Website design
  - Photography
  - Point person for volunteer hours

***Eric can put you in touch with anyone!***

## Meet your new Outreach & Education Coordinator

### Dennis Notes

Amy first came to the Rock County Annual meeting in January of 2018. I have had the pleasure of working with her on a couple of activities planned in Rock County and happy to report that I am confident we will have great success.

Welcome aboard Amy.

Amy Lord, [amy@iceagetrail.org](mailto:amy@iceagetrail.org)

Amy began her employment with the Ice Age Trail Alliance as the Outreach and Education Manager in January 2018. Amy and her husband have been members since 2010 and I encourage you to ask Amy how that came about. It is *one* method other Chapters have recruited members.

Amy's passion is in getting people on the trail and improving accessibility. Her career was in non-profits with a marketing, management and communication background. She has a degree from Edgewood College in Madison.

Amy's role as Outreach and Education Manager is work on relationships, communication, and education. She will be working with the Saunters Programs, Trail Communities, and the Strategic Plan. She has a commitment to organizational excellence strategies and will be working with a statewide leadership team.

## Examining the NPS web page for volunteer resources

### Dan Watson

NPS Volunteer Coordinator – Ice Age NST

700 Rayovac Drive, Suite 100

Madison, WI 53711

O: 608-441-5610 x7

C: 715-441-7717

[Daniel\\_watson@nps.gov](mailto:Daniel_watson@nps.gov) (include underscore between first and last name)

### Two ways to get the information

- <https://iceagetrail.org/volunteer/resources-volunteer-leaders/>
  - <http://iceagetrail.org>
    - Click on the yellow VOLUNTEER button on any page of the IATA website
    - From the navigation menu on the right side of the main volunteer page select “Resources for Volunteer Leaders”
- [http://nps.gov/iatr/getinvolved/supportyourpark/iatr\\_vip\\_program.htm](http://nps.gov/iatr/getinvolved/supportyourpark/iatr_vip_program.htm)
  - <http://nps.gov/iatr>
    - *Click on* - Get Involved
    - *From the dropdown* - Support Your Park
    - *Finally* – Program Materials/Safety Resources

### Resources Found

#### Dennis Note

A number of great resources are found at the above site, and volunteers and Chapter leaders should be familiar with them. Dan has a great many resources for Safety prepared.

Page 1 of the *Volunteer Safety Handbook* is a place for each of the Chapters to gather their emergency contact numbers. It was very eye opening when Rock County did ours.

#### *Volunteer Safety Handbook*

This handbook was the result of collaborative work between NPS, IATA, and volunteers. It is designed to be a template reference for all Chapters. The first page is for emergency contact numbers, and each Chapter should insert their own local phone numbers for emergency contacts.

#### *NPS Occupational Safety and Health Plan*

This document is mostly intended for the NPS inner-office, although volunteers are also referenced.

#### *301A Volunteer Agreement Form*

The 301A Volunteer Agreement Form is required of each volunteer in order to receive injury and Tort protections through the National Park Service and the US Department of Labor. Volunteers in good (current) standing through their membership in any IATA Chapter or Trail-wide Group are already covered under existing agreements with the NPS.

Non-IATA member volunteers (i.e. first time volunteers you have recruited for specific trail work, school or Scout groups, etc.) must complete an OF-301A Volunteer Agreement before performing any volunteer service on behalf of the Ice Age National Scenic Trail, in order to have Injury or Tort protections extended to them.

Volunteers under 18 years of age are considered juveniles and must have a legal parent or guardian signature on the agreement form. Thus, organized groups of juveniles (school groups, scouts, etc.) would still need to individually sign up as a single volunteer (each juvenile recorded on a 301A agreement form)

Organized groups of adults (Rotary Club, corporate volunteer groups, etc.) may have their leader fill out the OF-301A, and the remainder of the group providing their information on the OF-301B Group Roster.

### *301B Volunteer Group Roster*

The group roster may be used to sign up organized groups of adult volunteers to supplement the OF-301A Volunteer Agreement. The group leader fills out the OF-301A form, all other members of the group are listed on the OF-301B. This cuts down on paperwork.

Feel free to also use the **IATA Volunteer Event Sign-In Sheet** as an acceptable option to the OF-301B Group Roster.

### *Job Description Library*

Each volunteer is required to have a “Job Description” as part of the OF-301A Volunteer Agreement under which they are covered. Standardized Job Descriptions exist for work categories including:

- Trail Construction & Repair
- Trail Maintenance
- Vegetation Management
- Support Services.

The job description denotes the “scope of duties” a volunteer may be asked to perform.

The OF-301A Volunteer Agreement form on our website already references the “cumulative” job description list. This is done to cover all possible tasks, so the returning volunteers who may perform a different job than in the past will be still working under their “scope of duties”.

It is possible to create a new or unique job description if needed, but that should be rarely required. Contact Dan Watson if you feel you need a customized job description covering anything not posted on the NPS website.

Note that specific jobs are numerically referenced to a corresponding Job Hazard Analysis (JHA) for safety purposes. This numeric cross-referencing will aid you in quickly finding the proper JHA for any task in a job description.

### *Job Hazard Analysis List*

- Lifting Heavy Objects
- Long Handled Tools & Saws
- Power Mowers
- Painting
- Litter Pickup
- Chainsaw Operation
- Food Handling
- Motor Vehicle Operation
- Carpal Tunnel Syndrome
- Herbicide Safety

JHA's are written in a standardized template format used throughout the safety community. Simply, they serve three purposes: 1) identify each task or step within an activity, 2) denote the hazard(s) that could be encountered within each step of the activity, and 3) provide recommended procedures to avoid the hazard (s).

JHA's are useful in conducting safety briefings as they cover the materials in a very concise, yet thorough, manner.

### *Tailgate Safety Series*

- Chainsaws
- Driving
- General Hiking
- HAZMAT Encounters
- Heat Disorders
- Hike Leader
- Hydration
- Hypothermia
- Insects/Snakes/Animals
- Lyme Disease
- Thunderstorms
- Violent Encounters

The Tailgate Safety Series is a supplement to the JHA library. They cover topics not found in JHA's, and are good references at both the morning safety briefing as well as throughout the work day as circumstances change or unexpected developments occur. For example, you and your fellow volunteers may be on a lunch break out on the trail when you notice developing thunder clouds. A quick review of the Tailgate Safety topic "Thunderstorm Safety" would provide a plan of action.

## Trail Safe!



On the homepage of the NPS website, <http://nps.gov/iatr>, you will find a link to the *Trail Safe!* safety training program. *Trail Safe!* is a self-study series of eight videos, each running between 18 to 40 minutes long. The videos feature all core learning objectives of the NPS Operational Leadership Training, which is a 16-hour facilitated classroom training that explores the Human Factor of safety. Topics include Effective Leadership, Mission Analysis, Situational Awareness, Stress & Performance, and others. Volunteers can watch the *Trail Safe!* video series from the convenience of their own homes whenever time allows, and the entire time commitment to complete all eight lessons is only about three hours.

Please encourage the volunteers in your area to participate in *Trail Safe!*, and email Dan Watson when they have completed the series so they may be mailed the job aids explained in the videos (easy to follow instructions on how to email Dan Watson are posted at the bottom of the *Trail Safe!* web page).

## Chapter Revenue Sharing; A New Model to Increase Chapter Revenue

### Bob Lange and Luke

**Goal:** To provide professional, community-based revenue for local chapters of the Ice Age Trail Alliance that is collaborative, transparent and shared in responsibilities and results.

**Rationale:** As the Alliance moves forward with the next 3-year strategic plan, the need for increasing amounts of income to fund the plan are greater than any other time in its history. Likewise, local chapter needs will continue to increase, and past fundraising efforts may not be adequate for future projects and general maintenance of the Trail. Locally, raffles, hikes, and merchandise sales may not keep up with the demands of chapter responsibilities in the future.

In addition, foundations, corporations and individuals are becoming more selective in whom they support and a unified, professional approach will yield greater results than individual efforts. We are better together.

The Alliance has increased the professional fund-raising staff and is now ready to accept the revenue challenge that the new strategic plan presents. The number one issue will be to identify where and to whom we should be presenting our mission and vision for the future. That is where the chapters can play a significant role.

**Model:** Working together; the Alliance staff and local chapters can identify, research and strategize the best approach for potential supporters in order to coordinate and maximize revenue potential from a specific geographical location. Local Chapter leadership will be asked to identify potential key supporters in their area. The Alliance staff will do the necessary research and identify key individuals, past history and the potential for support. The staff will then determine the best proposal method, timing and an amount for solicitation. Local chapter leadership will be informed of the progress during all the steps for solicitation and the results of each proposal. Communication will be critical for success.

**Operational Structure:** Recognizing that this is a pilot program for the Alliance; the structure will be fluid based on experience with the model and feedback from the participants. Having stated that, the initial structure is envisioned to be as follows:

- Initially, 10 – 12 chapters will be involved based on local chapters' willingness to participate and Alliance staff resources. This is NOT mandatory for chapters.
- The Revenue Model will operate on a calendar year basis and any income earned based on the model will be tracked for potential distribution in the following year in the first quarter.
- The income distributed will be calculated based on an approved chapter budget for the year following the year the income was earned. The entire income may not be distributed if the chapter cannot justify the need based on the approved budget.
- Any income that is not distributed will be held in an account for Trail maintenance where needed.

- Once a year, the Alliance staff and participating chapters will meet at the Annual Conference to discuss any changes that would enhance the Revenue Model.
- This Revenue generated if greater than the current membership allocation, will be distributed, not both. If little or no revenue is realized, the chapter will receive the allocation as formulated in the past.

### Dennis Note

Only 10 of our Alliance Chapters will be able to participate this year. Six Chapters have come forward to date. Rock County will be pursuing. While the money will be nice for us, we also look forward to the additional hikers and volunteers on Trail Improvement Days that has the potential of bringing us.

### Current Chapter Revenue Sources

- Raffles
- Runs
- Merchandise Sales
- Membership Allocations

### With Typical Results

- Unpredictable
- Under Funded
- Inefficient

### Average income for Chapters

- Average Allocation = \$609
- Average General Contribution = \$552
- Average Merchandise Sales = \$447

The average is skewed by the larger Chapters.

### What If We Could:

- Make your chapter revenue more predictable?
- Professionalize your fund-raising efforts?
- Provide adequate revenue for chapter projects?
- Engage more volunteers?

### A new approach

- Work hand in hand with the Alliance philanthropy staff
- Engage corporations and foundations in your community on a new level
- Identify potential major donors in your community
- Raise awareness of the Trail and engage more volunteers

- Increase chapter revenue through targeted fundraising

### **The New Model Example**

#### Lodi Valley Chapter

2017 Budgeted revenue = \$2,950

2017 Budgeted Expense = \$8,910

Revenue Sharing Model = \$5,800

2017 Revenue remaining = \$2,450

Collaborative Fundraising - A New Model For A New Strategic Plan

### **Change**

If we are going to change the results...

the behavior and the methods must change.

So...let's change and move from success to significance!

### **New Model—Key Elements**

- This program is voluntary and must be approved by chapter leadership.
- Membership revenue allocations will remain if the amount raised is less than the allocation.
- Chapter training on prospect identification will be provided by the Alliance.
- No one in the chapter will be expected to “ask” for financial support.
- Current chapter revenue from runs, merchandise sales, and raffles will remain the same.
- Grants do not qualify since most of the funds are restricted.

### **Key Elements**

- Revenue identified will be accounted throughout the year and reported to the chapter in a year-end summary.
- If the shared revenue exceeds the traditional membership allocation; the chapter will receive the revenue share, not both.
- Once informed of the revenue share amount; the chapter will submit a budget as to how the revenue will be spent in the following year.
- Any revenue not spent, or budgeted, will be allocated to a State-wide fund for Trail maintenance.
- Collaboration, accountability, and transparency will be critical.

**Collaborative Fundraising –Lodi Valley Chapter Example**

Current Chapter Allocation	Charitable Gift Annuities	Corporate	Foundation	Individual	Total	10% to Chapter
\$435	\$37,000	\$3,000	\$15,000	\$3,000	\$58,000	\$5,800

## Advocacy

### Dean Paynter

#### Advocacy

PUBLIC **SUPPORT** FOR ... A PARTICULAR **CAUSE**.

#### **Our Mission:**

The mission of the Ice Age Trail Alliance is **to create, support and protect** a thousand-mile footpath tracing Ice Age formation across Wisconsin — the Ice Age National Scenic Trail.

One way to support is to spread the message of Ice Age Trail

#### **Two forms of advocacy**

##### **Casual – general interest**

*Who:* legislator, mayor, city manager, common council, county board supervisors

*What:* invite to hike, dinner, speaker meeting, etc. Add them to your newsletter list.

*Goal:* Let them know you value the Ice Age Trail; keep Ice Age Trail upfront in their minds.

*Repetition* is good! Ice Age Trail – Ice Age Trail

*Meet & Greet* – get to know and tell about the trail

##### **Issue advocacy – we ask for something**

*Who:* legislator, mayor, city manager, common council, county board supervisors

*What:* specific issue related to the trail in your chapter or related to the statewide trail.

*Source:* Ice Age Trail office or IATA Advocacy Committee

*Goal:* to show widespread support for the trail and issues related to the trail.

#### **Sources of Issue Advocacy Information**

- At times, we will ask for specific legislation to be passed or stopped or for a specific part of the budget to be supported or not
  - Roughly monthly E-news from IATA office
  - Advocacy Alerts – also emails from our office (have not been sent since last state budget)

#### **Your Voice Matters – Signup for Alerts**

- Advocacy efforts help support, and shape policies related to the Ice Age Trail.

- To keep a clear path on the Trail means you will hear from us occasionally.
- Emails will end up in your inbox more often when we need the wind at our backs and your elected officials need to hear from you on a specific issue.
  - You can sign up to receive Advocacy Emails:
    - <https://www.iceagetrail.org/volunteer/advocacy-alerts/>
  - Alerts come with talking points – you don't have to be an expert!

## Casual-General Interest Advocacy

### Meet & Greet

Initial meeting is to get to know the IAT and recognize what the IATA does. It opens the door for later contact on specific issues.

Local volunteers don't need to be experts on state policy or trail funding. Just share your love of the trail and what volunteers contribute.

**Elected officials represent you and they love to talk to voters.**

Add them to your email lists, newsletter lists, and other communications keep the words Ice Age Trail familiar to them.

Shake hands at the county fair and introduce yourself as an Ice Age Trail volunteer – thank them for supporting the trail.

### Is there someone in your chapter who could help with advocacy?

No experience necessary.

Just a love of the trail and a willingness to tell our story.

Is it you?



State Senator Janis Ringhand at  
Clover Valley

State Senator Janis Ringhand at Storrs Lake



Representative Deb Kolste at Storrs Lake

*We are all doers.  
So Let's Do!*



**Write a Postcard to your State Representative or State Senator**

Ideas below

Dear Representative \_\_\_\_\_.

Our Ice Age Trail chapter is hosting a hike on \_\_\_\_\_ and we would like to invite you to attend – with date and time.

Thank you for your support of the Ice Age Trail. The many miles of trail in our district are very heavily used and are an important asset to our community. I appreciate your support.

Did you know you have \_\_\_\_ miles of the Ice Age Trail in our district? Our Ice Age Trail chapter volunteers work hard to build and maintain the trail. Can you join us for a [hike-meeting-speaker-dinner etc.]

Congratulations on your election [re-election]! We would like to meet with you over a cup of coffee to talk about the Ice Age Trail and the work we do to create, support, and protect the trail we love. Would either of these dates { , } work for us to meet at Mocha Moment in Janesville?

**Thank you Trail Advocates!**

Join the Advocacy Committee.

Commitment: A conference call meeting of about one hour every couple of months.

See Dean Paynter, Ed Madere, Kevin Thusius, or Rod Bartlow to join.

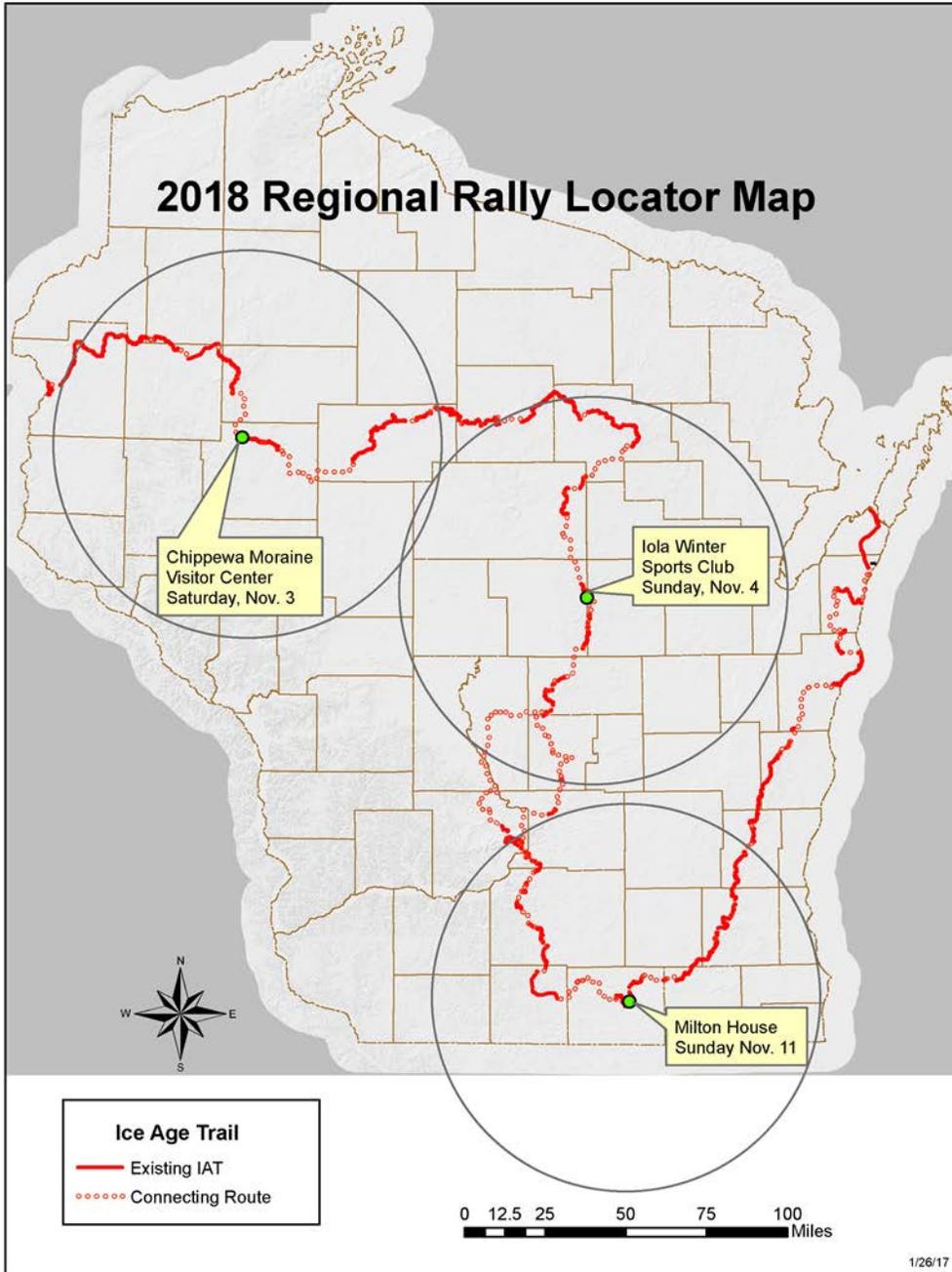
Won't you join us?

## Group Sharing

As a group we shared a few ideas of what really works for us:

- Rock County has a County Map that shows ALL hiking, biking and canoe trails in the County
- Listening
- Paying attention to synchronicity
- Handouts at events
  - Postcards
  - Refrigerator magnets
- Tyke Hikes
- Trail Community
- Summer Saunters
- Sororities and Fraternities
- Make a Difference Day with UW Whitewater
  - 250 students in Janesville
    - 50 working on park adjacent to trail with Green Rock Audubon Society
    - 50 working with Rock County Chapter on Trail
- Participation in Community Events.
- Look at barriers as opportunities

# 2018 Regional Rallies



Mike Wollmer: *Closing Thoughts*