



# ENGAGING NEW LEADERS

Leadership Development Module

VOLUNTEERS FOR OUTDOOR COLORADO  
**STEPPING UP**  
  
**STEWARDSHIP**

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### **About Volunteers for Outdoor Colorado (VOC)**

Volunteers for Outdoor Colorado is the oldest and largest outdoor stewardship organization in the state. We work to connect people to Colorado's outdoors in ways that inspire them to be caretakers of the state's natural resources. This is especially important because the demands on our outdoor resources are extensive and Colorado's stewardship needs are reaching a near-crisis level. VOC is playing a leading role in addressing these challenges in three ways. First, we're fostering statewide collaboration on issues and solutions. We're also expanding stewardship efforts by helping others build and grow successful volunteer programs. Finally, we're continuing to engage 5,000 volunteers each year in on-the-ground, hands-on stewardship work.

# Executive Summary

**D**eveloping volunteer leaders who are able to effectively manage other volunteers is one of the most important ways you can strengthen and build a strong volunteer program. This guide focuses on the recruitment of volunteer leaders, specifically moving them from an initial volunteer role into a trained leadership role.

## ▶ **How to Engage New Leaders:**

### ▶ **Target New Leaders**

- *Figure out the types of roles that your organization needs: entry-level roles (Crew Leader, Crew Chef, Tool Manager), or experienced roles (Technical Advisor, Training Instructor) and additional seasonal roles.*
- *Seek people who have volunteered in outdoor stewardship work - they will already understand outdoor stewardship and what it may take to be a volunteer leader on a project.*
- *Contact groups whose members already possess certain leadership skills (ex: members of AmeriCorps, veteran organizations, business/community leaders, etc.)*

### ▶ **Develop Your Message**

- *When conducting outreach to attract volunteer leaders craft a strong message about why leaders are critical. A few messages that have proven to be successful in outreach strategies include:*
  - *An outdoor stewardship project can only happen with the help of trained leaders*
  - *Trained leaders enable more volunteers to come out on projects. A single crew leader creates an opportunity for up to 10 additional volunteers to join a project.*
  - *Skill-building for professional and personal growth: skills are transferable and can be highlighted on a resume.*

### ▶ **Create Opportunities for New Leader Engagement**

- *Existing project leaders should be on the lookout for new talent. If they spot leadership potential in a person, they can discuss training opportunities. You will need a system for capturing names and contact information for follow up.*
- *Create specific recruitment events. Each January, VOC holds a "new leader info session", where we extend invitations to anyone who may be interested in becoming a leader and teach them about the different roles.*

### ▶ **Follow-up**

- *Determine the most appropriate time or opportunity to reach out and follow-up with individuals after a recruitment event. Consider following-up immediately and over the long term so that you can engage prospective new leaders appropriately.*

## ▶ **Key Takeaways:**

- ▶ **It's helpful to keep in mind your organization's project needs** and how leaders will help you meet those needs, while also planning for the inevitable leader attrition.
- ▶ **Continually build your leadership ranks** land managers, and anyone else involved - this gets everyone on the same page, clarifies responsibilities, and maintains structure and communication.
- ▶ **Once you have thought through your leadership needs** and set initial targets, you will want to begin to identify good candidates that may be well suited for a leadership role:
  - *People with previous volunteer experience*
  - *People with current leadership skills*
  - *Existing leaders who want to pursue a different role*
- ▶ **Engage new leaders through** recruitment events, on-project discussions, or ad hoc. Obtain contact information, follow up initially, and continue communication about becoming a leader. Once you have a firm answer - either way - track this information and do not continue to ask people if they have expressed that they are not interested.

# Introduction

**D**eveloping volunteer leaders who are able to effectively manage other volunteers is one of the most important and effective ways you can strengthen and build a strong volunteer program. This guide focuses on the recruitment of volunteer leaders, specifically moving them from an initial volunteer role into a trained leadership role.

This guide will be most useful to your staff or volunteers who manage projects and/or trainings.

Please Note:

- This guide contains a lot of information to help your organization engage new leaders. Some of the content is covered in greater depth in other modules, as noted throughout the guide.

- All of the Stepping Up Stewardship guides are intended to be complementary and not mutually exclusive. You may need to evaluate all the various resources to determine which offer the most appropriate fit for your specific program or project.

VOC recommends using this guide in tandem with the additional guide found in the [Leadership Development Module](#):

## ▶ [Skilled Volunteer Roles & Training](#)



# Recommended Steps

**This guide is organized** into seven "steps" to help your organization engage new leaders.

These are not "linear" steps that must be followed in a specific order. Rather, think of them as sections of information that you can choose to implement based on their relevance.

## Step 1:

Outlines a process for setting leadership targets, including defining roles, setting short- and long-term targets, examining seasonal needs, and accounting for leader attrition and program growth.

## Step 2:

Describes ways to identify target audiences for trained leadership opportunities.

## Step 3:

Explains the importance of developing your message when conducting outreach and offers examples of messages you can use.

## Step 4:

Describes strategies to help you create opportunities for new leader engagement.

## Step 5:

Offers recommendations for creating tracking and follow-up systems as well as identifying types of data to track.

## Step 6:

Provides examples of communications channels you can use to promote leadership benefits and needs.

## Step 7:

Explains the importance of measuring and reporting the outcomes and successes of your new leader engagement strategies.



**This Guide is accompanied by Supplemental Materials, that you can use in your efforts to engage new leaders.** They are mentioned throughout the guide, listed at the end, and provided separately.

# Step 1: Setting Leadership Targets

**B**efore you launch into a program to engage new volunteer leaders, your organization will want to think through and define the roles you need to fill and set short- and long-term targets to recruit and train your leaders that will be part of your organization for years to come. It's helpful to keep in mind your organization's project needs, and how leaders will help you meet those, while also planning for the inevitable leader attrition.

Below are tips to help you get started.

- ▶ **Define roles.** Your organization may need to fill a range of roles that require varying degrees of experience and training. When defining needed roles, distinguish between those that require no prior experience but that are trainable (for instance, through your own training program or through the [Outdoor Stewardship Institute \(OSI\)](#), and roles that require a greater degree of previous experience. Examples include:
  - ▶ **Entry-level roles** for people who require only basic training at the onset and would benefit from additional skills training later, such as:
    - *Crew Leaders* - lead volunteer crews in effectively executing the project work and help ensure volunteers have experiences that are safe, rewarding, fun, and inspiring
    - *Crew Chefs* - plan meals and menus, prepare food, and manage outdoor cooking areas
    - *Tool Managers* - ensure tools, project supplies, and Crew Chef equipment is transported to the project site, and that volunteer crews have proper and operable tools
  - ▶ **Experienced roles** for people who may come equipped with other life or career experiences, making them a ready resource for your organization's projects, such as:
    - *Technical Advisors* - serve as the technical liaison with the land management agency to develop the project design, prepare the project site (flagging, staking, etc.), provide technical direction during construction, and create construction notes for Crew Leaders including section tool requirements
    - *Instructors for trainings* - lead training workshops of 10 - 20 participants and assist in the development, planning, management, presentation, and refinement of training courses



For a full list and descriptions of new leader entry-level positions and experienced positions, refer to the [Skilled Volunteer Roles and Training Guide](#) in the [Leadership Development Module](#).

- ▶ **Set short- and long-term targets.** It is good practice to continually build your leadership ranks on an annual basis while understanding what your needs will be over the longer term. Do this by setting both annual and long-term volunteer leader targets. A good rule-of-thumb for longer-term targets is to plan at least three to five years ahead and estimate the approximate length of time you will be able to retain your leaders.



In VOC's experience, the average length of time a volunteer leader spends with our organization is three years. However, VOC also has volunteer leaders who have been supporting the organization for over 20 years.

## Step 1: Continued

- ▶ **Examine seasonal needs.** Your volunteer leadership requirements will change according to the number of projects in your entire season. It is helpful to determine what will you need to meet your seasonal needs while also keeping an eye on retaining volunteer leaders over longer periods of time.
  - ▶ **Your single season needs** will be based on the number of projects you are planning, the number of volunteers you will require and the technical nature of the work. While some of your trained volunteers may return to work on multiple projects within one season, it's good practice to understand how many instances of crew leadership you will require to meet all of your project needs.
  - ▶ **If you have multiple projects** scheduled over the course of a year, it will be helpful to determine how many of your volunteer leaders are willing to come out more than once to volunteer with you in a leadership capacity, and how many are interested in gaining new skills. It is unwise to plan more projects than you have the leadership capacity to support. We highly recommend surveying your leadership volunteers at least once a year to gauge their commitment and capacity for the forthcoming season.
- ▶ **Account for leader attrition and program growth.** When setting your volunteer leader targets, take into consideration potential or upcoming changes in the volunteer program. You can count on the fact that your volunteer leader force will periodically reduce through natural attrition due to changes in age, health, employment, family, or a permanent move out of the area.

As you consider additional changes to your organization, for example, expanding the number of projects you undertake, or changing the kind of stewardship work you do, you will need to ensure you are also training and developing your volunteer leadership to keep up with your new efforts. You may be able to increasingly serve in more complex roles in partnership with the land manager such as providing greater technical capacity required in master plans and trail designs completed by the land manager.

### VOC Mini Spotlight

When VOC initially formed, we did not have the role of technical advisor as one of our skilled volunteer leadership positions. We did however have volunteers in our ranks who expressed an interest in this type of role as well as land manager partners who needed the additional services this role could provide. We effectively changed the way in which we work based on the supply and demand in the market for outdoor stewardship volunteer services. As a result, we are able to offer a broader scope of services provided to land management agencies.

## Step 2: Identifying Target Audiences for Trained Leadership

**O**nce you have thought through your leadership needs and set some initial targets, you will want to begin to identify good candidates that may be well suited for a leadership role.

Here are some helpful tips in determining your target audiences for outreach:

- ▶ **People with previous volunteer experience.** As a starting point, seek people who have volunteered at least once in outdoor volunteer stewardship work. They already understand outdoor stewardship and what it may take to be a volunteer leader on a project.
  - ▶ If you have a volunteer program in place, target your existing volunteer ranks when conducting outreach.
  - ▶ If you are a new startup, seek people who have volunteered in the outdoors with another group.

## Step 2: Continued

- ▶ **People with current leadership skills or a desire to build their leadership skills.** Approach people you know who already play a leadership role within the community and who love the outdoors.
  - ▶ One possible avenue is to contact groups whose members already possess certain leadership skills – for example, members of AmeriCorps or veteran organizations.
  - ▶ Business or community leaders who love nature and natural places are another possible group to engage.
- ▶ **Existing leaders who want to participate in a different role and build their skills.** Cultivate current leaders in your organization who want to build their skills in new and different ways. Tool Managers, for example, often have more pre- and post-project work responsibilities but less responsibilities during the actual project day. Cross-training a Crew Leader to serve as a Tool Manager on occasion provides a change of pace for the leader who may a little more "down time" than leading a crew for the day.

### VOC Mini Spotlight

VOC doesn't stop recruiting existing volunteer leaders into additional trained leadership positions just because they are already a certified leader. We have multiple leaders who hold two or more leadership roles and can support a project in various ways, depending on the needs of the project, their interest, and time commitment that they have available.

## Step 3: Developing Your Message

**W**hen conducting outreach to attract volunteer leaders, it is important to craft a strong message about why leaders are critical.

A few messages that have proven to be successful in outreach strategies include:

- ▶ **What's in it for outdoor stewardship**
  - ▶ An outdoor stewardship project can only happen with the help of trained leaders
  - ▶ Trained leaders enable more volunteers to come out on projects. For example, a single Crew Leader creates an opportunity for up to 10 additional volunteers to join an outdoor stewardship project
  - ▶ The complexity of outdoor stewardship – for example, on technical projects such as building a retaining wall or a bridge crossing – requires that trained leaders be able to show unskilled volunteers how to do the work and lead them through the process safely and effectively
  - ▶ Leaders ensure a great volunteer experience and will keep volunteers coming back to support outdoor stewardship again and again
- ▶ **What's in it for the organization**
  - ▶ Volunteer leaders lighten the load on the organization's staff members and other volunteers, enabling them to focus on another part of the stewardship project. For example, Tool Managers ensure the appropriate tools make it out on the project and that they are in good working order. Crew Leaders provide a fun and safe experience while making sure the work is done to high-quality standards and according to the land manager's expectations.

### VOC Mini Spotlight

Some VOC volunteers register for projects because they know a certain crew leader will be there and they want to be on that person's crew – to learn skills or simply because they like the person and the type of volunteer experience they are sure to have while on the crew. In addition to having great crew leaders, VOC makes sure that volunteers are well-fed and made to feel appreciated by our crew chefs.



## Step 3: Continued

### ▶ **What's in it for the leaders**

- ▶ Skill-building for professional and personal growth: skills re transferable and can be highlighted on a resume
- ▶ Community recognition as a leader in outdoor recreation and lifestyle
- ▶ Perks such as early registration for highly desirable or popular projects
- ▶ Community and camaraderie with other like-minded people
- ▶ Participation in something with a big impact
- ▶ Stepping stone to the next level of leadership, with access to additional opportunities that require previous, hands-on leadership experience



See examples of a leadership path in the [Skilled Volunteer Roles and Training Guide](#) in the [Leadership Development Module](#).

- ▶ **Next steps: how they can get involved as leaders.** In your messaging, it is important to clearly define what steps people will need to take to become a leader with your organization, in addition to outlining your application process and issuing a call to action. Here are tips for messaging around next steps:
  - ▶ **Interested in a leadership opportunity?** Speak with an existing leader to better understand the role and expectations
  - ▶ **Try it on for size!** Shadow an existing leader on a project or help out in that role for a day peak with
  - ▶ **Ready to register?** Register for and complete the training

## Step 4: Creating Opportunities for New Leader Engagement

**Y**our organization has developed a strategy for setting targets, identified target outreach audiences and created messaging. Next you will want to create opportunities to actively engage and recruit people into different roles.

- ▶ **Notice and acknowledge their potential.** One of the most effective strategies for engaging and recruiting new leaders is to notice their leadership potential and discuss opportunities for them to become trained. Tips for recognizing prospective new leaders include:
  - ▶ **On-project.** It is important for your existing leaders to be on the lookout for new talent. If they spot leadership potential in a person, they will need a system for capturing names and contact information and share this information with someone who can ensure that there is appropriate follow up.
  - ▶ **Ad hoc.** Outside of projects, whenever your organization's staff and existing volunteer leaders are attending events or doing anything related to the outdoors, they will want to talk with people who may be interested in leadership and follow up with them accordingly. You never know where your next leader may be coming from and leveraging all opportunities is a good practice.



# Step 4: Continued

## VOC Mini Spotlight

VOC has created a method for "making a personal ask" when approaching potential new leaders to be part of the volunteer leadership team. Below are the three primary components of VOC's "personal ask" process.

- 1. Outline a process for engaging personally** with the new potential leader, who is ideally a person with an already-established relationship with the existing volunteer leader. The process involves making contact in an appropriate manner (such as on a project, by phone or at event), noting the person's contact information on a "Leadership Interest" card, following up to determine the best next steps, and ultimately registering the potential leader for relevant training.
- 2. Provide tips for "Making the Ask"** – emphasizing the need to make it personal by noticing how many projects the new potential leader has participated in or noticing his or her skills in action; explore personal background and skill sets; sharing information about a particular leadership position that might be a good fit; talking about the VOC leadership community, and what being a part of that community means; answering any questions and addressing any immediate concerns; and letting the person know by being a leader, more people will be able to get involved and have a great, safe and fun volunteer experience.
- 3. Answers Frequently Asked Questions**, such as, "How does becoming a leader benefit me?", "What is the full range of leadership opportunities?", "What do I need to do first?", "What is the time commitment for a volunteer leader?" and "What trainings are currently available?"

- ▶ **Create specific recruitment events.** Consider hosting events focused on new leader recruitment – although other events that are not leadership-specific can also be helpful in discussing leadership opportunities. A good rule-of-thumb is to be intentional about planning recruitment opportunities – for example, incorporate recruitment into your plans for community events, such as potlucks, happy hours and celebratory events.

## VOC Mini Spotlight

Each year, VOC holds a "New Leader Info Session", extending an invitation to anyone who may be interested in becoming a leader to attend and learn about the different roles. (January is a particularly good time of year to offer this session, as people often have New Year's resolutions related to volunteering and skill-building!) VOC spotlights "entry-level" roles with a program that outlines what the roles are and makes at least one existing leader available to answer questions. Food and beer are offered to make attendees feel extra welcome. On the right is the card VOC asks attendees to fill out before leaving.



2018 Info Session  
Leadership Interest Card

NAME: \_\_\_\_\_

Please circle the number that reflects your interest:

1. Ready to sign up
2. Interested, but need more info
3. Might be interested in the future
4. Not at all interested

1	2	3	4	CREW LEADER
1	2	3	4	TOOL MANAGER
1	2	3	4	CREW CHEF

OTHER COMMENTS:

\_\_\_\_\_

\_\_\_\_\_

## Step 5: Creating Tracking & Follow-up Systems

Your organization will need to have systems in place to track and follow up with potential new volunteer leaders – as well as identify what specific types of data should be tracked.

- ▶ **What to track.** At a minimum, you want to be able to follow up with anyone who expressed interest in a leadership role or was recognized by another person for their leadership potential. Two good pieces of information to track are: 1) What role they are interested in and 2) How they came to you as a potential leader so that you can reach out appropriately.
- ▶ **Who will follow-up.** Determine who will follow-up and decide when and how to track this follow-up. It is helpful, but not necessary, to have someone who already knows the prospect and can bring that relationship to bear to be the designated person for the outreach. Be sure to track the follow-up so that a person who has declined the opportunity isn't contacted repeatedly.
- ▶ **When to follow-up.** Determine on an individual basis the most appropriate time or opportunity to reach out and follow-up after a recruitment event. Consider following-up immediately and over the long term so that you can engage prospective new leaders appropriately – remembering to be specific in your ask and take into account the person's individual interests.

## Step 6: Communications to Promote Leadership Benefits & Needs

There are a variety of electronic and print media your organization can take advantage of to communicate leadership opportunities, benefits and needs. A few communication channels are offered here.

- ▶ **Develop boilerplate language** that refers to your messages ([Step 3](#) above) and insert that language in your newsletters and on your social media channels.
- ▶ **Include a "call for leadership"** in print materials, such as your annual project calendar, holiday letter, marketing collateral, annual report, postcards and other materials.
- ▶ **Send targeted emails** to those who fit your target audience, especially those who have expressed interest in taking on a leadership role. Remember to include good messages about why volunteer leadership is important for outdoor stewardship and what's in it for the leader – as well as a specific call to action (for example, if you already have a training scheduled, make a call to action for them to register by a certain deadline).

### VOC Mini Spotlight

In every printed brochure, VOC has a call for leadership.

A recent example is included on the right.

Our dedicated Volunteer Leaders help organize and execute each volunteer project, enabling us to engage even more people in caring for Colorado. Learn about the leadership roles below at [voc.org/vocleadership](http://voc.org/vocleadership) or call 303-715-1010 ext. 117.



#### Crew Chef

These volunteers plan and prepare meals to keep others well-fed and fueled on both single-day and overnight VOC projects.



#### Crew Leader

These volunteers lead others on VOC projects in groups of 8-10 people to ensure everyone has a fun, safe, and rewarding experience.



#### Tool Manager

These volunteers organize and transport tools and equipment to and from VOC projects.

## Step 7: Measuring & Reporting Outcomes

A critical component of a successful new leader engagement strategy is the measuring and reporting of outcomes.

Ask and answer the following types of questions during your evaluation:

- ▶ What worked? Why did it work?
- ▶ What challenges came up? Were you able to overcome them or address them appropriately?
- ▶ How many new leaders came out during the season?
- ▶ How many leaders became lapsed, and why they did not return to volunteer with you?
- ▶ Can the leaders be re-engaged next season? Why or why not?

Then identify who needs to know about your successes and outcomes:

- ▶ Should you make your organization's board of directors aware of your leadership development efforts and their success?
- ▶ Do you have a committee of leaders who can help you in your efforts in the future, and should you report your outcomes to them?
- ▶ Who else needs to know?



## Conclusion

**T**his guide provided best practices and ideas to help your organization start or expand its efforts to engage new volunteer leaders. It outlined a process for setting targets, explained the importance of developing your message when conducting outreach and offered recommendations for creating tracking and follow-up systems.

A list of [Supplemental Materials](#) is provided below.

- ▶ **Personal Ask Process**  
Outlines VOC's process for effectively implementing the personal ask among trained volunteers including Frequently Asked Questions and answers.
- ▶ **Personal Ask Response Cards**  
An example of the card used on projects to collect potential leader name and contact information.
- ▶ **New Leader Night Invitation**  
An example of the messaging used to inspire potential leaders to attend VOC's New Leader Night.
- ▶ **Print Marketing Materials with a Call for Leadership**  
Examples of messaging from VOC's printed marketing materials specifically calling on people to become trained leaders.
- ▶ **Electronic Communications with a Call for Leadership**  
Examples of messaging from electronic newsletters and social media posts specifically calling on people to become trained leaders.

Check out the rest of the guides for  
**Leadership Development**

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Engaging New Leaders

Skilled Volunteer Roles & Training

