# SKILLED VOLUNTEER ROLES & TRAINING

Leadership Development Module



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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**

This guide addresses ways your organization can create and implement strategies to develop skilled volunteer leaders. After reading this guide, you will be able to assess your volunteer leadership needs, identify training resources and begin developing your volunteer leaders.

#### ► How to Develop Skilled Volunteer Leaders:

- Assess the types of volunteer leaders that your organization needs. These could include Project Team Leader, Crew Leader Manager, Crew Leader, Crew Chef, Tool Manager, etc. (see <u>Step 1</u> for a description of VOC's leadership roles).
- ▶ Figure out how you will train your leaders. Consider the types of projects you will take on, the technical skills you will require, and the level of experience you will need from your leaders. For example, you may need to train your leaders on skills such as teaching to different learning styles, recognition and praise, and conflict management. Train your new leaders as early in the work season as possible so that trainees have ample time to put their new skills to work.
- ▶ Mentor your leaders. Mentor your new leaders under the guidance of another experienced leader so that they can gain confidence in their leadership abilities and continue to strengthen their skills.
- Provide a path for advancement. In order to grow and mature your organization's leadership development, offer opportunities for trained leaders to take their leadership roles to the next level. Provide a path for them that shows how to progress from an entry level type position to a more advanced role. Motivate and encourage them to increase their leadership by highlighting the benefits for stewardship, your organization and to themselves.
- ▶ Foster recognition, reward, and community among volunteer leaders. One of the strongest motivators for volunteer leaders is recognition of their work. Take the time to introduce each leader on volunteer projects, highlight leaders in your organization's newsletter, and host leadership recognition events (see <a href="Step 5">Step 5</a> for other examples of recognizing leaders).



VOC's <u>Outdoor Stewardship Institute (OSI)</u> provides training resources including print and online materials that you can incorporate into your own training program, as well as a calendar of training events (see <u>voc.org/training</u> for a list of more OSI Training resources).

#### Key Takeaways:

- ▶ Having a team of skilled, trained volunteer leaders is essential to your organization's ability to mobilize an effective volunteer workforce.
- Develop a detailed job design for each of the volunteer leadership roles you will be filling.
- Identify training resources and begin developing your volunteer leaders. Consider how you will develop leadership skills, set training goals and manage scheduling.
- ▶ The Outdoor Stewardship Institute (OSI) is VOC's leadership training organization.

  OSI has partnerships with organizations across the state to build volunteer leadership capacity for important outdoor stewardship work. Consider sending your leaders to training workshops like OSI where they can learn important leadership skills
- Pair your new volunteer leader with a mentor or another experienced leader to assure that they are indeed prepared to take on the role of leader.
- Make sure to recognize your volunteer leaders at every opportunity to motivate them to continue volunteering with your organization and further expand their leadership roles.

## Introduction

aving a team of skilled, trained volunteer leaders is essential to your organization's ability to mobilize an effective volunteer workforce and increase the capacity of your volunteer program.

Volunteerleaders may serve in a variety of critical roles for your program - from ensuring the safety and comfort of volunteers, to planning the technical aspects of a stewardship project and, ultimately, ensuring success. In addition, because volunteer leaders have more responsibility than other volunteers, they are likely to become more invested in the position than in a short-term volunteer role.

As a starting point for volunteer leadership development, this guide addresses ways to assess your volunteer leadership needs, identify training resources and begin developing your volunteer leaders. It is recommended that you review the <a href="Engaging New Leaders Guide">Engaging New Leaders Guide</a> in tandem with this guide, as it provides helpful insights about recruiting volunteers to fill leadership roles.

This guide will be most useful for those staff and volunteers involved in your training program (if you have one) and managing on-the-ground volunteer projects.

#### Please Note:

- This guide contains information to help your organization develop skilled volunteer 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 <u>Leadership Development Module</u>:

► <u>Engaging New Leaders</u>

# **Recommended Steps**

This guide is organized into five "steps" to help your organization create and implement strategies to develop skilled volunteer 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:

Focuses on how to determine your volunteer leadership needs and offers a descriptive list of volunteer leadership roles.

## Step 2:

Features best practices and resources for training your leaders.

## Step 3:

Offers guidance on mentoring your leaders, including a list of desired mentor skills, abilities and roles, and a list of mentoring resources.



## **Step 4:**

Provides guidance for creating a path for advancement for your volunteer leaders.

## Step 5:

Describes techniques for fostering recognition, reward and community among volunteer leaders.

This Guide is accompanied by <u>Supplemental Materials</u>, that you can use in your efforts to develop skilled volunteer leaders. They are mentioned throughout the guide, listed at the end, and provided separately.

# **Step 1: Determining Volunteer Leadership Needs**

**Determining the number of volunteer leaders** you will need, and in what capacity you will need them, depends on the scope and size of your organization's planned projects. To make these decisions, your organization will need to take the following factors into consideration:

- ▶ How many total volunteers will you engage in a typical project or season of work?
- What is the level of technical difficulty of the projects?
- ▶ What sort of volunteer experience will you be providing?

**Before recruiting leaders,** it is critical to develop a detailed job design for each of the volunteer leadership roles you will be filling. The list below summarizes the leadership roles commonly used on VOC volunteer projects. The list is not intended to be exhaustive, because trained and skilled volunteers may optimally serve in any leadership or project management task your organization may require.



See the <u>Project Management Guide</u> of the <u>Project Planning Module</u> for a more general discussion of roles needed in a project planning team.

**Each of the roles below** entails specialized training or orientation to the position. Some of the roles can be trained through VOC's <u>Outdoor Stewardship Institute (OSI)</u> referenced later in this guide.

- Crew Leader: This is a person who works with a crew of diverse individuals to complete a section or portion of a project.
  - ▶ Ensures that crew members have a safe and high-quality experience
  - Is expected to manage and oversee the work, the people and the safety for their project section
  - Oversees approximately 8-10 volunteers (the more technical the project, the lower this ratio becomes; for simpler projects such as weed removal or trash pickups, the ratio can be higher)
- Crew Leader Manager: This is a project team member responsible for larger, more complex projects (of 75 volunteers or more).
  - ► Facilitates training and project orientation
  - Works with the Technical Advisor to divide the project into appropriate work units
  - Allocates/re-allocates Crew Leaders and crew members throughout the project day
  - Is responsible for project safety and performing project-based risk assessment and emergency planning



# **Step 1: Continued**

- ► Crew Chef: This is a fun, yet vital role, on the project team: keeping volunteers happy and well-fed! A big part of this role entails safe food handling, preparation and storage practices.
  - ▶ Single-day projects: Manages food donations and sets up breakfast and lunch
  - Longer projects: Plans meals and menus, manages budget, prepares food and manages outdoor cooking areas.



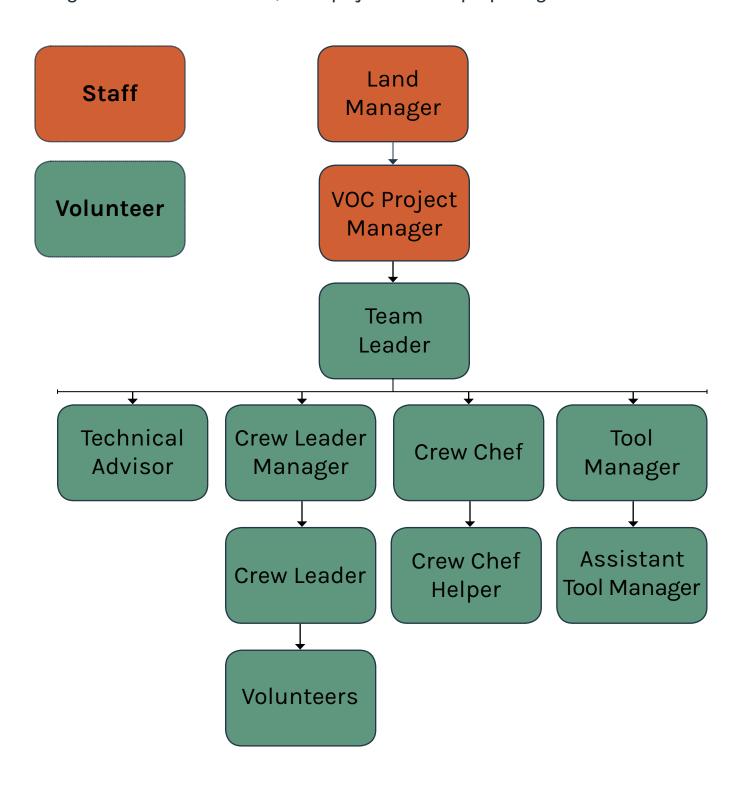
Assign someone to take the lead on planning and managing food needs, and recruit one or more assistants to help. Building-in these supports can be crucial to a project's success.

- ► Team Leader: This person is responsible for the overall coordination and facilitation of the project team from start to finish.
  - Schedules and facilitates project planning team meetings
  - Informs the project team members of team meetings, important action items and team decisions
  - Records the minutes of each meeting or assigns someone to do so. The minutes are then sent out to the entire project team.
  - Ensures that each team member understands his or her role and completes his or her tasks
  - Ensures the timely completion of the project timeline
  - Ensures that each team member submits any necessary post-project reports
- Technical Advisor: This person is responsible for acting as the technical liaison among agency staff and is responsible for the project design, site preparation and technical direction during construction.
  - Plans and designs the project in coordination with land management agency staff
  - Prepares construction notes for crew leaders and project team members
  - Divides the work into appropriately sized sections
  - Determines which tools, supplies and materials are necessary for project completion
  - Supervises construction/project work activities on the day of the project
- ► Tool Manager: This person is responsible for all activities related to tool management on projects.
  - Works with other members of the project team to determine what project equipment tools and supplies are needed, and ensures they are available
  - Manages and arranges transportation of tools, equipment, project materials and other project-support supplies to the project
  - Supervises distribution of tools
  - Provides for tool and equipment security on project day



# **Project Leadership Organization Chart**

Using the roles described above, VOC's project leadership reporting structure is:





Additional resources include:

Outdoor Stewardship Institute (OSI) training: <a href="www.voc.org/osi">www.voc.org/osi</a> VOC leadership role descriptions: <a href="www.voc.org/vocleadership">www.voc.org/vocleadership</a>

# **Step 2:** Training Your Leaders

ffective volunteer training is at the core of volunteer leadership development. Volunteer leaders need a variety of both soft and hard skills to perform their jobs well, and many resources are available to facilitate that development. The best practices and resources below provide a starting point.

#### **Best Practices**

When developing a training program, it's important to consider how you will develop leadership skills, set training goals and manage scheduling.

#### Develop leadership skills

Just because a person can build the trail doesn't mean he/she can successfully guide others to do the same. For volunteers who lead others, the ability to facilitate a safe, fun and productive volunteer experience is just as important as having the technical chops to do so themselves.

#### ▶ Set training goals based on organizational needs

- It's important to consider the types of projects you will take on, the technical skills you will require, the project model you will use and the level of volunteer experience you will need. Consider these questions:
  - → Will you be hosting large events, or facilitating smaller, ad hoc projects?
  - → Do you have a committed agency or other professional partner that can work with your group on technical project design, or will volunteers do this?
  - → Will you be feeding volunteers or extending other benefits, and who will manage those offerings?

#### Manage training timing/scheduling

Most trainings are best done as early in the work season as possible so that trainees have ample time to put their new skills to work. You may also consider hosting a training session immediately prior to a specific project, especially if that project has unique or uncommon skill requirements.

## **Training Resources**

VOC operates the Outdoor Stewardship Institute (OSI) to provide training resources in Colorado and beyond. In addition to providing print and online materials that groups can incorporate into their own training programs, OSI hosts an annual calendar of training events. OSI works with partners across Colorado to bring customized training opportunities to individual groups, communities and regions. Here is a list of available resources:

- OSI Training Calendar
- OSI Training Course Descriptions
- OSI Materials
- OSI Online Training (available late 2018)
- Tips for setting up a successful training (checklist)

#### **VOC Step-Up**

OSI-trained Crew Leaders can leverage leadership modules in their training programs – including modules focused on:

- Teaching to different learning styles
  - Keys to effective listening
  - Recognition and praise
  - Conflict management

## **Step 2: Continued**

#### **VOC Mini Spotlight**

The following are a few examples of the groups and regions where VOC has provided training through the Outdoor Stewardship Institute over the last few years:

 OSI partners with many smaller organizations throughout Colorado who do not have their own crew leader training programs. For example, OSI partners with Trails 2000 in Durango, CO, offering yearly Crew Leadership for Trails classes to build volunteer leadership capacity for important work on mountain biking trails in the local community.

"Many of our members and volunteers have participated in excellent OSI Training in Durango. The curriculum provided a common and unified language for our crew leaders and other groups in the region for volunteer crew management and basic trail skills."

- Mary Monroe-Brown, Executive Director, Trails 2000
- OSI has also adapted in recent years its training to meet natural disaster needs such as fire and flood restoration efforts.
   Partnering with the Coalition for the Upper South Platte, the Rocky Mountain Field Institute and the Flying W Ranch in the heavily damaged Colorado Springs area several years ago, OSI's restoration trainings provided new leaders to these organizations who were on the front lines in their region to manage these restoration efforts.
- OSI is a training partner of the Colorado Youth Corps Association and its affiliated members that serve teens and young adults, offering crew leader training for these in back and front country crew-based programs.
- With a rise in mountain biking throughout Colorado, OSI designed a specialized training to address rock structures on mountain bike trails, working with a local mountain biking group to fieldtest the training.
- OSI works in contracted partnership with trail and outdoor stewardship organizations in other states, providing instructors and curriculum as requested. OSI has trained volunteers in Missouri, Minnesota, Florida, New Mexico, and Arizona and in partnership with many national and scenic trail systems.
- Organizations with trail adopter programs can use OSI's
   Independent Stewardship for Trails training, designed to enable
   smaller groups to independently manage place-based projects in
   partnership with area land managers.

# **Step 3: Mentoring Your Leaders**

The learning doesn't end when training is over. Mentoring new leaders, under the guidance of another experienced leader is a critical next step to help newbies gain confidence in their leadership abilities while continuing to hone and expand their skills. At the same time, your organization benefits from an extra level of assurance that the volunteer is indeed prepared to take on the role of leader.

- ▶ Identifying good volunteer leader mentors is essential. The following checklist of mentor skills, abilities and roles will help you when seeking a volunteer to fill the crew leader mentor role and note that these concepts can generally be applied to other leadership positions as well. The crew leader mentor should:
  - ▶ Be an experienced crew leader in good standing
  - Demonstrate sound safety, technical, leadership and communications skills
  - ▶ Be patient with good teaching and interpersonal skills
  - Understand the use of Crew Leader Tracking Form (provided in <u>Supplemental Materials</u>)
  - ▶ Review with trainees the completed tracking form by the end of the project
  - Review and understand leadership modules
  - Provide strong technical support to crew leader during mentoring project

VOC utilizes a variety of tracking forms and other tools when training, mentoring and evaluating volunteers for different positions.

These resources are provided in **Supplemental Materials**.

## **Step 4: Providing a Path for Advancement**

Many times, trained volunteer leaders want to take their leadership to the next level. Offering such opportunities will enable your organization to grow and mature in its leadership development. Below are some best practices you can use as a guide to build a solid leadership ladder.

Outline a path that supports organizational mission and needs. For volunteers who aspire to have opportunities beyond entry-level leadership, show them how they can grow and take on more responsibility within your organization. Provide a path that shows volunteers how to progress from Crew Leader to Technical Advisor, or from Tool Manager to Team Lead – and

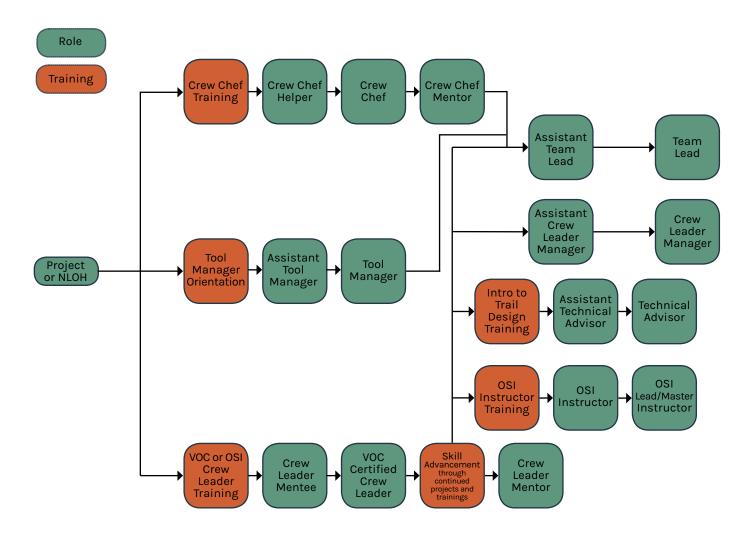
everything in between. Doing so will help volunteers understand how a larger investment of their time and talent can help the organization and provide for their own personal growth at the same time. Here are a few tips:

- Create leadership role descriptions (view VOC's at www.voc.org/vocleadership)
- Create a leadership lifecycle chart for your organization. VOC's example is provided below.
- Consider involving volunteer leaders in higher-level organizational planning and decision-making. Please see the <u>Deepening Volunteer Engagement</u> <u>Guide</u> in the <u>Volunteer Engagement Module</u> for more information.



## **Step 4: Continued**

**VOC's Volunteer Leadership Lifecycle** process begins with a project or our annual New Leader Open House (NLOH) event and continues with training or orientation for a specific position.



- ▶ State the case for leadership. When discussing new or expanded leadership roles with volunteers, it's important to think about how you frame the ask. Consider the following tips:
  - Frame the position as an opportunity to serve
  - Be as specific and honest in your appeal as possible: State what you need and why you need it and specify skills and time commitment required so that potential volunteers can decide whether they are a good fit.
  - ▶ Be enthusiastic: If you are not committed to or excited about your program, no one else will be either!
  - Address the personal benefit questions: What kinds of skills can volunteers learn or improve through leadership? What personal needs might the position meet for them? Are there any perks or incentives involved with becoming a leader?
- Remember the power of a personal ask. Forming personal relationships with your leaders is the most effective way to promote your leadership advancement opportunities – and includes fine-tuning the personal ask. Many volunteer leaders report that they became interested in increasing their leadership role because someone personally encouraged them to do so.

# **Step 4: Continued**

The key tipping point for someone considering increasing his or her investment in your organization may be because someone simply said, "We need your help." Here are a couple of tips:

- ▶ Look to your current volunteers if you already have a volunteer program in place: Encourage volunteers already in your ranks to keep their eyes open for and actively engage with anyone who might be interested in increasing their skills or involvement – and give them a means to collect contact information and follow up.
- Develop a personal-ask process: Ask your volunteers and staff to follow a set of guidelines when conversing with someone about their leadership aspirations.



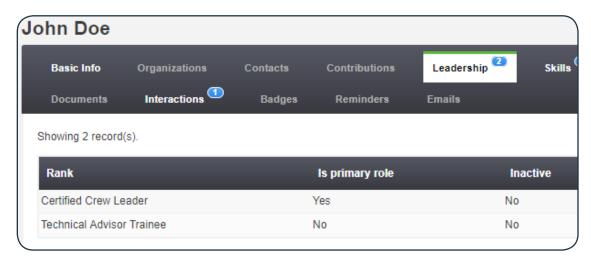
See the **Engaging New Leaders Guide** of the **Leadership Development Module** for additional tips on making the personal ask.

## VOC's "Personal Ask Guidelines" are included in **Supplemental Materials**.

- Track path progression and perform follow-up. Keeping good data about your volunteer leaders' progress is just as important as tracking your project accomplishments. For example, keep track of trainings your volunteers take and the skills they are learning. This will help you determine who might be ready to take the next step toward a more advanced leadership position and give you the opportunity to target individuals for personal encouragement. Keep these tips in mind:
  - Make time for personal follow-up with volunteer leaders as they first become engaged with your organization and advance in skills and responsibility
  - ▶ Tracking quantitative data can help you organize your leadership development program, but at the end of the day, it's the qualitative input (through personal interactions) that will best enable you to identify volunteer leaders who are ready to advance their leadership opportunities

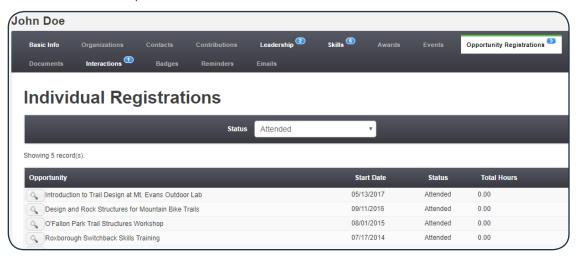
Below are some examples of ways to track leadership data with regard to rank, training participation, skills and interactions.

▶ Rank: In this example, information tracked focuses on the leadership roles the volunteer has been certified to perform. Here, John Doe is a crew leader and is working on his technical advisor certification.

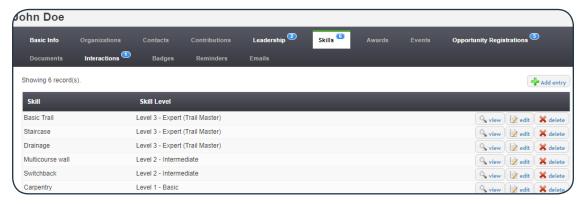


## **Step 4: Continued**

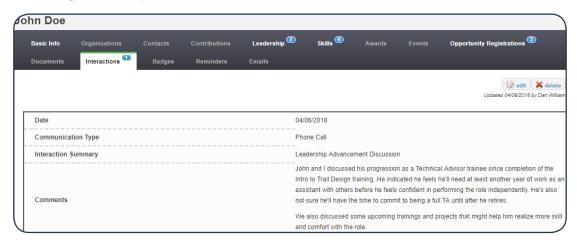
▶ Trainings Attended: Information tracked here is about trainings John Doe has attended, which helps you to determine when he might be ready to take on more advanced leadership and understand his experience level.



▶ **Skills:** Information tracked here includes specific skills John Doe demonstrated on projects and his level of proficiency.



▶ Interactions: Information tracked here includes qualitative input in the form of personal interactions and the individual's own confidence and comfort level. Often, the decision about whether the volunteer is ready to advance in leadership comes down to this more qualitative information. Keeping track of this data will help you manage the follow-up process and continue conversations as you recruit new volunteer leaders and encourage existing leaders to pursue advancement.



# **Step 5: Recognition, Reward & Community Among Volunteer Leaders**

**Perhaps the biggest motivator** for volunteers is recognition of their work. When we are recognized, we get reassurance that others have noticed our contributions and consider us important and worthwhile. While we rarely do things for recognition alone, we are far less likely to do them if we are not recognized for our hard work.

Reward is also a powerful motivator. Reward may come from the satisfaction of completing the work itself, but may also come in the form of celebratory events, perks and other benefits.

Finally, a sense of belonging to a like-minded and supportive community is a great motivator for volunteer leaders and can lead to better leadership engagement and retention.

Below are some recommendations for ways in which you can foster these opportunities among your volunteer leaders.

- On-project recognition. Recognizing your volunteer leaders during every project is the simplest form of recognition. Here are some tips
  - Always take the time to call-out the specific contributions of those who volunteered their time for the planning and leadership of the event
  - When volunteers are grouped together at the start of the day, call out each leader by name and make sure everyone knows how valuable their contributions are
  - After a project, send each of your leaders a personal thank-you note highlighting their unique efforts
- Newsletters. Use your organization's newsletter to highlight leadership efforts or consider creating a special newsletter that you distribute to your leadership ranks. Types of information to feature:
  - List of upcoming projects that will need volunteer leaders
  - Information about trainings and other upcoming events
  - Space where peers can recognize each other's leadership achievements and contributions
- Perks and benefits. Offer additional rewards volunteer leaders will enjoy and appreciate. Examples include:
  - Give volunteer leaders swag they can wear, such as nametags and hats. This demonstrates that your organization finds the roles valuable and immediately indicates the status of the leader to other volunteers.
  - If you use a registration process, offer your volunteer leaders a chance to register early for projects for which the general public must wait for a specific date to sign up

#### **VOC Mini Spotlight**

VOC distributes the Leadership Ledger, a newsletter specifically designed for its leadership ranks.

#### Meet Our FEATURED LEADER: Robin Donner

Get to know our featured crew leader, Robin Donner!

Robin grew up in northwestern Illinois in a family of outdoor sportsmen where she learned to love nature and cast her first fishing lines at a young age. Vacations were to camping destinations in northern Wisconsin and the boundary waters above Lake Superior which also offered lots of wildlife viewing.

When Robin began a new job three years ago, she was given the ultimatum to move closer to Chicago. "I said 'thank you very much, but if I'm going to a major city, I want Denver and the gorgeous Rocky Mountains! It worked out, and here I am."



Robin's experience with VOC began soon after her move. The company whom she works for, Accenture, has a corporate citizenship initiative which offers its employees a chance to volunteer in their communities. At the time, Accenture had a corporate partnership with VOC, and its employees came out on a VOC project once or twice per season.

# **Step 5: Continued**

- hosting an annual event or a few different events throughout the year with the sole purpose of thanking volunteer leaders for their contributions. This also gives volunteer leaders an opportunity to come together and celebrate their collective accomplishments. While planning events requires extra effort, they are an indispensable way of offering a sincere form of recognition and creating an open and fun environment. Examples of events include:
  - Informal, picnic-style mid-season potluck
  - Formal end-of-year Awards and Appreciation Night
  - Happy Hours
- Establish formal annual awards.

Recognize your most dedicated volunteers, including those who serve in leadership roles through annual standing awards. See the <u>Making Volunteers Feel Valued Guide</u> in the <u>Volunteer Engagement Module</u> for additional information.

#### **VOC Mini Spotlight**

VOC hosts an annual Awards and Appreciation Night, recognizing the best contributors of the year in different categories:

- Volunteer of the Year Award: Awarded for outstanding volunteer leadership and continued dedication to outdoor stewardship
- Young Volunteer of the Year Award: Awarded for outstanding volunteer leadership and continued dedication to outdoor stewardship as demonstrated by a young volunteer
- Mentor of the Year: Awarded for exemplary leadership in teaching and conveying stewardship practices to new crew leaders
- New Volunteer of the Year: Awarded for outstanding volunteer efforts and dedication to outdoor stewardship during their first years for involvement with VOC
- Unsung Hero Award: Awarded to a VOC volunteer who provides outstanding support and service in a behind-the-scenes role for the organization



## **Conclusion**

This guide provided guidance, best practices and ideas to help your organization start or expand its initiatives to develop a skilled workforce of volunteer leaders.

## A list of **Supplemental Materials** is provided below.

## Crew Leader Trainee Tracking Form

VOC's form for tracking trainees' progress in crew leadership training and mentoring, including evaluation and recommendations.

### Instructor Peer Review Form

The form that experienced Outdoor Stewardship Institute (OSI) instructors or staff use to evaluate the performance of potential OSI instructors.

## Tool Manager Evaluation Form

VOC's form for assessing a volunteer's ability to serve as a Tool Manager, including proper tool loading and safe operation of oversized vehicles.

## Pre-Workshop Checklist

The checklist used by the Outdoor Stewardship Institute (OSI) in preparing for a training course; includes packing list and deliverables for both the instructor and partner organization.

## Personal Ask Guidelines

An example of the guidelines that VOC shares with volunteer leaders to help them recruit potential new leaders.

# Check out the rest of the guides for

# **Leadership Development**

**Engaging New Leaders** 

Skilled Volunteer Roles & Training

