

Creating Association ROI Through Volunteer Training

A Strategic Approach to Volunteer Training



Contents	Tapping the Volunteer Career Pathway as a Starting Point	3
	Volunteer Matrix	4
	Building Your Learning Program	6
	The Pathway to Leadership	7
	Putting the Concept in Action	10
	Final Note	12
	About the Authors	13
	Advisory Panel	13
	Resources	13



Member Volunteers bring passion to their work...

What they don't always have are the leadership and team skills needed to make the most of that passion. Imagine if a board member came to the first meeting with a clear understanding of the mission, able to articulate the vision and knowing the financial dynamics. Imagine if the board member embraced the role of foresight and strategy over the need to be in the operational mindset. Imagine if a committee chair understood effective meeting facilitation and how to manage peer-volunteers.

Tapping effectively into the diverse skills, knowledge and energy of our volunteers requires a commitment on our part to reduce barriers to entry and provide effective volunteer preparation. We need only to look at the effective practices from human resource management to gain a roadmap on how we can do just that.

Yes, volunteers are different from paid staff. The time and attention they can give to training and development for their volunteer roles is limited. In addition, their motivation to spend valuable time on training can be missing. Association VRM (volunteer resource management) requires a modified training system. One approach is to adopt the learner journey map concept for our volunteers. This builds on the [customer journey map](#) concept. By offering learner journeys that align with volunteer motivations and aspirations, we can increase their willingness to invest time in training and their effectiveness in doing the volunteer work we need in our associations.

This tool offers an approach for associations to take in designing their volunteer training. It draws on

- [Adult learning journey mapping](#)



- **We need a board that is ready to focus on the future, rather than the day-to-day operations of the association.**
- **I want to provide more resources to our volunteers but aren't sure what they need.**
- **My volunteers just don't understand their roles. How can I show them the way?**
- **We've struggled to make our volunteer program a win-win endeavor.**

- [Volunteer personas aligned with Volunteer Pathway model](#)
- [Volunteer Competencies Matrix](#)

This toolkit is designed for association staff interested in incorporating this concept into their own volunteer management system. The models we share are intended as guides and are drawn from our collaborations with [a group of association pros](#) and our work in volunteer management. This is less a template ready for cut and paste and more a collection of samples to enrich your own journey.

Tapping the Volunteer Career Pathway as a Starting Point



CC BY-SA Mariner Management

To frame our approach, we start with the typical volunteer pathway which maps a volunteer's journey through five learning and development stages: Emerging or new volunteer; learning volunteer; new volunteer leader; experienced volunteer leader; and strategic volunteer leader.

Each stage is defined by member characteristics, nonprofit knowledge, association specific knowledge, and volunteer skills. Essentially the general skills, knowledge and abilities needed by most volunteers at that career stage. Note, we are talking in generalities here. Within a level, there will be a variety of different roles each of which will have specific skill requirements. Our purpose here is to

define the categories rather than write individual position descriptions. Check out [this example](#) geared to community service volunteers that offers another way to think about volunteers.

The Volunteer Matrix (see below) provides an example of how this might be captured. The value of this step is three-fold.

1. For **the volunteer**, it helps frame the scope, competencies and prerequisites of the association's volunteer opportunities, including being transparent on the assessment process. It also identifies areas of learning an individual may need to explore or re-visit as they move through the various levels described. Critically, this helps the volunteer understand what is needed to be successful in governance if that is their aspiration.
2. For **volunteer mentors and recruiters**, it helps them offer current and prospective volunteers a sense of where they might get started and/or aspire to across the continuum of volunteer opportunities.
3. Last but not least, defining your volunteer pathway guides **the organization** in developing training, resources, and onboarding and orientation materials that serve volunteers where they are in the learning process, which brings us to the purpose of this resource.

Guiding Questions to Build your Volunteer Matrix



1. What are the typical volunteer roles we have in the association? What are we looking for in each case in terms of knowledge about the association and associations in general, and general skills to complete the role successfully?
2. Where do these roles fit on a continuum based on the level of experience and knowledge needed? As you consider the continuum, what are the emerging levels along that continuum (e.g., learning, new volunteer leader)?
3. Based on those levels, what are the typical motivations that successful volunteers generally have?
4. What motivations are generally needed by a member at each level?

Volunteer Matrix: Levels, Characteristics, Skills, Knowledge, Roles and Training

Level 1 – The New Volunteer

MEMBER CHARACTERISTICS	ASSOCIATION-SPECIFIC KNOWLEDGE	ASSOCIATION GOVERNANCE	GENERAL SKILLS	VOLUNTEER ROLES
<ul style="list-style-type: none"> Individual interested in contributing to [Association]’s work 	<ul style="list-style-type: none"> Understands the basics about [Association] as a membership organization 			<ul style="list-style-type: none"> New volunteer in a micro or ad-hoc role

Level 2 – The Learning Volunteer

MEMBER CHARACTERISTICS	ASSOCIATION-SPECIFIC KNOWLEDGE	ASSOCIATION GOVERNANCE	GENERAL SKILLS	VOLUNTEER ROLES
<ul style="list-style-type: none"> Individual interested in becoming more actively engaged in helping [Association] achieve goals, seeks to build personal and professional skills 	<ul style="list-style-type: none"> Understands objectives and goals for the project/program on which they are helping Has a basic understanding of [Association]’s overall goals and objectives 	<ul style="list-style-type: none"> Understands the roles and responsibilities of a volunteer Understands privacy and conflict of interest rules 	<ul style="list-style-type: none"> Has necessary skills/knowledge to do assigned tasks Is able to assess their needs so they know when to ask for help 	<ul style="list-style-type: none"> Ad-hoc volunteer for committee or group Ad-hoc volunteer working on a project

Level 3 – New Volunteer Leader

MEMBER CHARACTERISTICS	ASSOCIATION-SPECIFIC KNOWLEDGE	ASSOCIATION GOVERNANCE	GENERAL SKILLS	VOLUNTEER ROLES
<ul style="list-style-type: none"> Individual who leads others to achieve goals from a lead position or in a collaborative team 	<ul style="list-style-type: none"> Understands [Association]’s structure and how the communities work together Has a basic understanding of [Association]’s membership model, governance model, and products and services 	<ul style="list-style-type: none"> Understands the basic principles of a not-for-profit organization Understands the basic fiduciary responsibilities and financial budgets 	<ul style="list-style-type: none"> Has leadership skills to lead a small group Can think and act strategically Can prioritize activities for the group Understands basic business processes 	<ul style="list-style-type: none"> Ad hoc project leader; Active leader on committees or groups Volunteer mentor

Level 4 – Experienced Volunteer Leader

MEMBER CHARACTERISTICS	ASSOCIATION-SPECIFIC KNOWLEDGE	ASSOCIATION GOVERNANCE	GENERAL SKILLS	VOLUNTEER ROLES
<ul style="list-style-type: none"> Individual who serves in a lead position over diverse, self-motivated groups; role is leading through strategic direction rather than managing or doing 	<ul style="list-style-type: none"> Full understanding of the many workings of [Association] and its programs and initiatives 	<ul style="list-style-type: none"> Understands governance models Understands legal and governance responsibilities, e.g., By-laws, voting, decision-making rules of order, lobbying rules Understands succession planning and volunteer recognition and development Full understanding of fiduciary responsibilities 	<ul style="list-style-type: none"> Thinks strategically Is able to manage resources through others Has a basic understanding of cultural diversity 	<ul style="list-style-type: none"> Chair of major committees or groups, state society leaders

Level 5 – Strategic Volunteer Leader

MEMBER CHARACTERISTICS	ASSOCIATION-SPECIFIC KNOWLEDGE	ASSOCIATION GOVERNANCE	GENERAL SKILLS	VOLUNTEER ROLES
<ul style="list-style-type: none"> Individual seeking a significant role in [Association]’s direction as board member, officer, spokesperson or advocate for the organization 	<ul style="list-style-type: none"> Full understanding and knowledge of [Association], its history and strategic vision for the future Full understanding of the profession 	<ul style="list-style-type: none"> Clear understanding of 501 c3 or c6 model, governance options and key areas of legal, fiduciary and risk issues Understands the complexities of leading a large organization 	<ul style="list-style-type: none"> Acts as a strategic thinker Has effective communication and interpersonal skills Is able to create an environment for sharing and healthy discussion 	<ul style="list-style-type: none"> [Association] Board Member, leader of significant initiative

CC BY-SA Mariner Management / www.MarinerManagement.com

Building Your Learning Program

As you develop your matrix, a useful resource is the ASAE Research Foundation “Board Member Competencies and Selection” study which examined how competency-based board recruitment and selection practices support optimal board performance. They mapped out five leadership skill areas (see chart) related to competencies needed for effective board service. A [summary](#) is available free to ASAE members and the full findings are in [Recruit the Right Board: Proven Processes for Selecting Critical Competencies](#).

Five General Leadership Skill Areas and Related Board Competencies



Group Skills

Team orientation



Interpersonal Skills

Communication
Relational
Influence
Reputation



Personal Skills

Strategic
Innovative



Technical Skills

Knowledge of the field
and organization
Expertise and
experience



Personal Attributes

Commitment
Integrity
Capacity

Source: Board Member Competencies and Selection Study/ASAE Research Foundation

The research distilled processes of the board selection and nominations, elements of which associations can adapt for their distinct needs. Common steps explored in the findings include

- Selecting the nominating committee
- Defining needed competencies
- Creating a job description and issuing a call for nominations
- Screening and interviewing candidates
- Preparing the slate and selecting the board

Building Your Learning Program

The matrix provides intel in which you can build your learning program by exploring what modules could assist an individual to grow, learn and succeed in their volunteer journey, regardless of where they are in that journey.

By training, we are looking at skill development beyond the orientation and onboarding (what’s my job, how do I show up, where do I find the files). We make a distinction between transactional and developmental training. Transactional training is that which is needed to do the current job and follow volunteer protocols. Transactional training may overlap a bit with your orientation.

Developmental training is focused on leadership cultivation; that is developing the hard (teachable, measurable) and soft (interpersonal) skills needed to be a successful leader in any role. Both are important and are needed at different times, depending on the volunteer’s motivations, volunteer role, and career stage.



“When nonprofits think about volunteer training, the immediate thought is volunteer orientation and induction. But it’s more than that. Volunteer training can be helpful and inspiring support for all stages of volunteer involvement from newcomer to established volunteer to volunteer leader. Volunteer training can be the engine to moving a volunteer past placement to commitment and will help keep their passion fueled.”

—Tobi Johnson, VolunteerPro

Training = transactional

Learning topics:

- How associations and specifically your association work beyond the narrow lens the individual may have
- Volunteer rules and responsibilities, i.e., what is needed to volunteer successfully
- Task or role specific, e.g., how to login to the system, deadlines, etc

Development = leadership cultivation

Learning topics:

- Strategy
- Foresight
- Leading
- Communications
- Presenting
- Difficult Conversations
- Negotiation
- Consensus Building

To maximize your volunteer workforce, you should offer a variety of modules and options that provide learning opportunities for all volunteers. The solution is accessible training available year-round, which addresses stages of volunteer engagement through a variety of channels in real time and asynchronously. The result of accessible training: each volunteer receives the right amount of learning at the moment of need.

The Pathway to Leadership

Most associations offer a variety of volunteer opportunities ranging from short term to strategic stewardship through board service. Individuals find various entry points to an association's volunteer system with the easiest to access being those which are program or project focused and shorter term. How does an association effectively move volunteers from these entry points to higher, more strategic volunteer engagements? Similarly, how does an association prepare a volunteer to move into leadership roles?

Returning to the premise that investing in volunteers as lifelong learners provides value to your association, we now turn to the need to move them from tactical and operational support to strategic leaders. However, there is not one single way to develop your volunteers. They come to your association with different experiences and different motivations. As such, it is important to build a set of tools to develop your volunteers on their terms. These modular building blocks follow volunteers through a learning journey. Just like any journey, you need to prepare for the trip. In this case, we start with an assessment of volunteer motivations.

What is onboarding, orientation, training?

[Mutually Beneficial Volunteerism](#) highlighted a key area of greater association attention: consistent volunteer training, orientation and onboarding. The research found that too often associations skip training altogether and focus on orientation almost as a "substitute." Still, associations reported that orientation happens with some frequency at the board and perhaps the committee chair level. It's worthwhile to understand the distinction. Some associations do an admirable job with the leadership programs, designed in many ways as a member benefit, giving them a place to start as they expand their volunteer workforce development.

Key Definitions

Orientation is a one-time event welcoming member volunteers to the committee, board, role. Covers what the job is, how the work will get done and critical rules (code of ethics, key rules).

Onboarding is a series of events, which includes orientation, that helps volunteers understand how to be successful in their role and how their work contributes to the overall association.

Training is equipping the volunteer with necessary skills and knowledge needed to do the current job or prepare for the next.

Using Volunteer Motivations to Build Learning Pathways

Volunteers step forward to serve your association for many reasons. By looking at what is behind the offer to volunteer, you deepen your understanding of your volunteers' behaviors. Taking into consideration these motivations helps to shape your approach to volunteer training and development.

Examples of Volunteer Motivations

- I want to become more involved with the association.
- I want to deepen my understanding of the profession or industry.
- I want to improve my professional soft skills.
- I want to be a leader.
- I am looking to gather business intelligence.
- I am looking to gain new business.
- I would like to give back to the association or profession/industry.
- I want to expand my personal/professional network.
- I am seeking to build my personal brand.



Let's take a look at two motivations and specific training and development modules to offer them.

Motivation	Training	Development
I hope to build a technical skill for my current job.	The mechanics of editing the chapter newsletter which develops the volunteer's editing skills.	Considering diversity and inclusion in communications.
I hope to build new skills to get promoted or land a new job.	The fundamentals of meeting management such as building an agenda, running effective meetings.	Negotiation and delegation skills that are often necessary for leading teams.

Building further on the connection between motivations and volunteer learning journey, below are several scenarios you might experience where a volunteer comes to you with a set of experiences and motivations that may influence their pathway to national/global governance. In these scenarios, we projected what could be offered to the volunteer in both training and development modules to demonstrate how you can pick specific modules to help the volunteer succeed and grow so that they are best prepared to lead your association in the future.

Scenario

01

Your volunteer:

- A mid-career professional that has no management experience.
- Has completed 2-3 ad hoc volunteer activities for the chapter.
- Is in line to become a chapter vice-chair and then chair.
- Would like to eventually serve on the national board.

Selected Modules to Offer

Training (transactional) modules

- Chapter rules and operations
- Chapter vice chair and chair responsibilities
- Relationship between chapter and national/global
- Budgeting and how to read financial statements

Development (leadership) modules

- National/global strategic plan
- Meeting facilitation
- Consensus building
- Leadership

Scenario

02

Your volunteer:

- Is a mid-career professional that has managed small teams.
- Has served several years on the chapter's annual meeting program committee.
- Has not yet served as program committee chair.
- Would like to serve in a chapter leadership role.
- You (association staff) think this person has potential to serve on the national board.

Selected Modules to Offer

Training (transactional) modules

- Chapter rules and operations
- Governance duties of obedience, loyalty, and care

Development (leadership) modules

- National/global strategic plan
- Public speaking
- Risk management

Scenario

03

Your volunteer:

- Is a senior-level professional with advanced technical skills that is highly respected in the profession/industry.
- Has never managed a team but has extensive public speaking experience.
- Has served as an association spokesperson for technical expertise.
- Would like to give back to the association by serving on the national board.

Selected Modules to Offer

Training (transactional) modules

- Governance duties of obedience, loyalty, and care

Development (leadership) modules

- National/global strategic plan
- Foresight
- DEI

Scenario 04

Your volunteer:

- Is an early-career professional.
- Would like to serve nationally.
- Is not interested in walking the ladder.
- Has ideas and passion.
- Is already a strategic thinker.
- Is looking for a leadership home.

Selected Modules to Offer

Training (transactional) modules

- Governance duties of obedience, loyalty, and care
- Budgeting and how to read financial statements

Development (leadership) modules

- National/global strategic plan
- Difficult conversations
- Leadership

When you do the upfront work to consider various pathways, it allows you to build different scenarios, identify modules, and consider how they fit together into a comprehensive training system. This process also provides direction on which modules are critically important and set them at the highest priority. Keep in mind that there are many approaches to building your library of training and development programs. Some modules you will build yourself. For others you may buy third-party programs (LinkedIn Learning, for example) or partner with another organization.

We encourage you to follow a process to first understand where the volunteer is coming from and then match the training and development to that person's situation. This powerful process empowers volunteers to make choices in their learning journey, shows the value of volunteering as a way to learn and grow, and provides the structure for you to offer a broader array of programs that will ultimately lead to volunteers who are better prepared to strategically lead your association.

Putting the Concept in Action

We offer this path to explore the learner-centric strategy for your association's volunteer learning program. To be clear, your association may need fewer or additional steps. By reviewing our "readiness" questions below, you can adapt these steps as needed.

- Create your volunteer pathway and volunteer matrix (sample above). *Tip: It is useful to gather a group of staff members and/or a task force of volunteers.*
- Identify what training is needed for each level and specific role, and then do an inventory to determine what you have (ready to go or ready with modifications).
- Build your volunteer scenarios (sample above) to help you both in confirming priorities for education development and thinking through formats. *Tip: Interview a number of volunteers at different levels in the association.*
- Map out your learning products. To maximize your reach and resources, use a blended approach of online and in-person training. Online allows on-demand learning and the blended approach reserves class time for the most important content.

Training Content Options

- ✓ Tap into readily available tools/subscriptions such as [LinkedIn Learning](#) or [MindTools](#)
- ✓ Tap into members' resources
- ✓ Curate a YouTube channel featuring recommended videos
- ✓ Tap online training resources such as [Free Management Library](#)

- Consider a range of channels such as
 - » Live training (virtual or in-person) through workshops and sessions at an annual conference, leadership training conference, etc.
 - » Live webinars to focus on topics and encourage interactivity
 - » Self-study options through on-demand webinars, short topic videos (animated or taped), courses in your LMS
 - » On-the-job training which offers hands-on learning at the moment of need (think learning new software/app, onsite training)
 - » Self-help/learning options via articles, white papers, tip sheets, check lists etc., housed in a searchable resource portal
 - » Collaborative or peer-to-peer learning through small cohorts or learning circles; virtual lunch n learns or in-person roundtables are short-term options
 - » Robust content portal
- Set priorities for content development. *Tip: As you assemble the content, identify what is needed most urgently.*

Connecting the Volunteer to Learning

As we noted earlier, learner journeys that align with volunteer motivations and aspirations increase a volunteer’s willingness to invest time in training. If we are being learner-centric, we will engage the volunteer in a discussion to determine their pathway. This says to the volunteer, you give us time and we want to invest in you!

- How to confirm a volunteer’s profile including skills achieved? Be learner-centric; let the individual self-assess. This could be a self-assessment with guiding questions, or an interview with your volunteer manager. See sidebar for resources.
- What is the volunteer’s awareness of the skills needed to be successful? Build the self-assessment into your volunteer orientation and onboarding processes to encourage volunteer self-awareness. Use your volunteer pathway and matrix to educate volunteers on the skills needed for success. By tying that with guidance on how to develop those skills, volunteers may be more likely to self-assess and seek training. It is far easier to help a volunteer work towards a goal, say committee leadership or board service, than it is to deliver the message you aren’t qualified.

Assessment Resources to Check out

- ✓ AHIMA, [American Health Information Management Association](#) created this [volunteer self-assessment](#) through a volunteer task force. When completed, it leads interested volunteers to their online store for leadership training resources.
- ✓ [Build your Confidence as a Volunteer Leader](#) offers a self-assessment guide for individuals leading volunteers. Tobi Johnson’s post is more directed to staff liaisons but the question-driven guide is suitable for volunteer leaders.

Are You Ready? How to Determine Your Next Steps

Your association’s readiness to tackle the volunteer learner journey concept depends on several factors that impact the modules you offer, how you deliver them, and the complexity of learner pathways you build.

1.

Consider your association’s overall volunteer strategy. Your answers to these questions may help you define preliminary conversations and steps to take before implementing specific changes.

- To what extent does staff understand the importance of volunteers to the association?
- Is there a willingness to invest in our volunteers?
- Do you recognize that you don’t have a strategic board and want to do something different?

- To what extent do you work with volunteers as continuous learners?
- Are you open to discovering, and then acknowledging, different volunteer pathways through your organization?

2.

Examine the readiness of multiple departments such as learning/education, component relations, and membership to join together in developing a

volunteer learner journey approach.

- To what extent can each department contribute essential skills and perspectives in developing your volunteer learning modules?
- Are there multiple efforts independently being developed and can you work to have them build upon and support each other?
 - For example, an association that offers a leadership development program to members can pull elements of that program into its board orientation.
 - Similarly, the membership team can include volunteer learning modules in its listing of member benefits.

3.

Assess your capacity and bandwidth.

- If you are at the beginning stages, you may need to first focus on creating a few training modules unique to your association's setting while using standard development modules available from other sources to broaden your portfolio.
- If you are further along, you can create customized development modules as well.
- Similarly, you may initially create only two or three simple learning pathways and then add to them as you have more experience and gain additional insights into what your volunteers need.

What if we're not ready...

Or want to explore this concept on a smaller scale? The underpinning philosophy of providing training based on volunteer motivations and goals can be implemented in many stages.

If you are the staff person charged with preparing chapter leaders, consider how to apply the concepts to your chapter leader conference, webinar series and resource portal.

If you are the staff person charged with committee liaison role, consider how you can apply the concepts to an onboarding process for committee volunteers. Just as there are many paths for volunteers, we have many paths for how to step up our game in supporting and developing our member volunteers.

Final Note

Just like adult learning journeys, there is not one defined starting point nor is there a single endpoint for developing your association's approach to volunteer learning. You might decide to tackle this in phases where you implement one or two concepts and then gradually add additional modules and tactics along the way. You might already have some of these pieces in place and want to take your volunteer program to the next level. We encourage you to be measured and thoughtful in implementing this concept so that you are successful in each step of the journey.

About the Authors



Peggy Hoffman, FASAE, CAE, is president of Mariner Management, an association management company which is home to two associations and provides an array of support and training to associations and, most importantly, member volunteers. Peggy has provided training and counsel to dozens of global, national and local membership associations over the past 30 years. She often draws on her own team's research on volunteerism, member communities and association innovation. Mariner led the ASAE Foundation's study on Mutually Beneficial Volunteerism and is currently conducting a follow-up study to define effective volunteer models for associations (expected completion Q1 2022). Peggy not only enjoys working with association volunteers but is an active volunteer for her professional association – including serving as a chapter past president.



Kristine Metter, MS, CAE, founded Crystal Lake Partners in 2019 to help nonprofits advance their missions while adhering to strong business practices. With more than 30 years of experience, she works with association staff and volunteers to grow revenue, embrace foresight, strengthen stakeholder experience, and design meaningful events. Her deep knowledge of strategy and operations gives her the unique ability to help associations imagine the possible and bring it to reality. Prior to Crystal Lake Partners, Kristine held senior staff positions with a variety of trade associations and professional societies. She has also worked in the health services field bringing critical social programs to diverse communities.

Advisory Panel

We are grateful to the following association executives for their guidance as we developed this concept.

Michele Champion, CAE

California Association of Marriage and Family Therapists

Lindsay Currie, CAE

Council on Undergraduate Research

Ann Dorough, CAE

American Institute of Architects

Nabil El-Ghoroury, PhD, CAE

California Association of Marriage and Family Therapists

Becky Folger

American Mensa

David Jennings, CAE, SPHR, SHRM-SCP

Community Associations Institute

Wendy Mann, CAE

CREW Network

Susan Mosedale, IOM, CAE

ASIS International

Diana Tucker, CAE

NAIOP, the Commercial Real Estate Development Association

Resources

[Mutually Beneficial Volunteerism](#), ASAE Foundation, 2017 | a research-based approach to volunteer systems and support

[Recruit the Right Board: Proven Processes for Selecting Critical Competencies](#), ASAE Foundation, 2019 | a source for identifying volunteer skills and experiences needed for success

[Learner Journey Mapping and the Experience Pyramid](#), Joyce Seitzinger, 2017 | this LX journey mapping presentation explores the Learner Experience Pyramid which describes the learning shift from tasks to experiences.

[Customer Journey Maps- Walking a Mile in Your Customer's Shoes](#), Andreas Komninos, Interaction Design Foundation, 2020 | this post offers a look at what a customer journey map is and how to use it.

[How to Use Learner Journey Mapping to Improve the Educational Experience](#), WBT Systems, 2020 | this post highlights the touchpoints in a learning journey which associations can apply in their own programs.

[How to Take a Learning Experience: Miserable to Memorable](#), Bottom Line Performance (now Tier1 Performance), 2018 | this post offers seven steps in a learner journey and they put them into this [sample worksheet](#).