

Coaching Volunteer Leaders: Tips for Creating a 12-Month Strategy

“Do not mess with intrinsic motivation. Amplify it instead to create delight.”
— Jake Orlowitz, founder, Wikipedia Library

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. What 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? What if a committee chair understood effective meeting facilitation and how to manage peer-volunteers?

The solution is **accessible orientation and training** available year-round, which covers four key areas to address stages of volunteer engagement through a variety of channels in real time and asynchronously. Let's explore these four areas.



Audience

Segmented by volunteer role, volunteering experience and learning styles



Content

Covering four categories: association specific, job specific, operational and leadership skills



Timing

A blend of scheduled (*start of the job/year or key milestones*) and on demand (*think just-in-time*)



Channel

Building in one-to-one, one-to-many and many-to-many

The result of accessible orientation and training: each volunteer receives the *right* amount of learning *at the moment* of need.

AUDIENCE

Let's look at volunteers through two lenses: (1) role and (2) individual learning styles. By role, we are talking about where they are in your volunteer pathway.

- Are they just exploring or in their first role getting to know you?
- Have they stepped into a role leading a project, a team or a task?
- Have they been involved for a while?

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. As a bonus, it provides volunteers with a career path in your volunteer community.

Individuals usually enter the volunteer continuum with little knowledge about the organization or the role for which they have signed up. Over time they may leave and re-enter at different times for different purposes and in different roles depending on their current interest, professional needs, life cycle, etc. The goal of the system is to ensure they are positioned to succeed in the role they have chosen or for which they have been selected regardless of those variables.

This sample pathway includes the emerging volunteer – that individual just dipping their toe in the water. At this level, your “training” is largely about acquainting the member with what to expect in volunteering.

The volunteer’s learning styles and preferences is the second lens. We know much about adult learners from research and practice. That knowledge hasn’t always been integrated in our approach to training volunteers. By designing our volunteer training around [effective adult learning neuroscience](#), we will build a system that provides content and training in a variety of formats to meet the needs of different learners. We will talk more about formats under Channel. Read more on [Adult learning practices and putting them to practice](#).

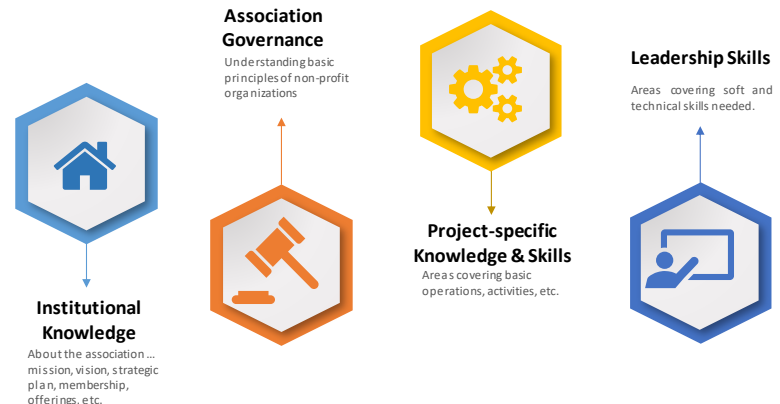


CONTENT

Determining content starts by identifying the knowledge and skills required for effective performance in each role. Consider foundational knowledge, task-specific knowledge/skills and leadership skills.

We can organize the content into 4 categories:

1. **Institutional Knowledge:** the must know and useful to know information about your organization.
2. **Association Governance:** what volunteers need to know about nonprofit organizations. At the entry level, the focus is on the governance structure and how decisions are made while at the leader level the knowledge dives deeper into risk management and legal issues.



3. **Project/Role Specific Knowledge and Skills:** answers questions on policies, procedures and how-to's (how do I run an event, create a newsletter, analyze the financials...?).
4. **Leadership Skills:** answers how to lead a team, committee, chapter, or community. This covers technical and soft skills.

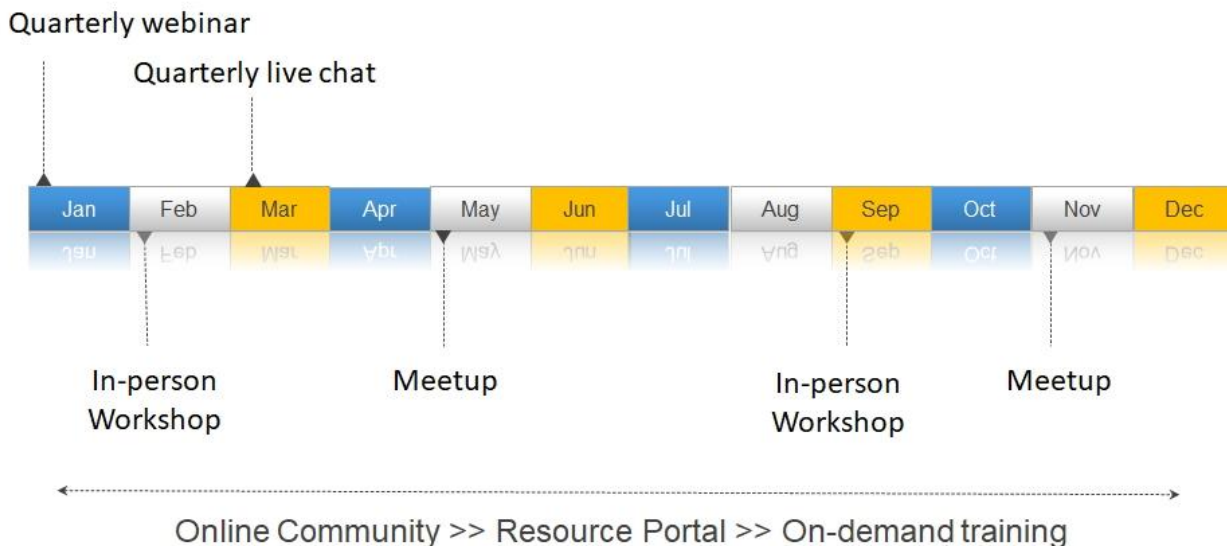
Need help in creating content? Check

- [YouTube](#) – tens of thousands of high-quality training videos on relevant skills from which you can curate and [build playlists or channels](#)
- [LinkedIn Learning](#) – leadership skills and volunteering essentials; you have the option to [recommend or curate](#) content or create [custom and pre-built learning paths](#).
- NonprofitReady.org – [Free Online Volunteer Management Training](#) (a bit focused on c3 but has some gems)
- Mindtools – career building videos, e.g., [Leadership Skills: Become an Exceptional Leader](#)

TIMING

Volunteers need just-in-time support throughout the year. We can also target two specific times: at the start of the job or year and key milestones within the year.

Setting up your training calendar with this mind will take building in three options: scheduled events throughout the year timed to critical milestones; on-demand 24/7 for just-in-time learning; and the annual event often held at the beginning of new year.



Recognizing that time is the commodity in shortest supply for volunteers underlies all three options! Learning modules should be trimmed as tightly as possible and offered in micro-chunks, through a variety of channels, on-line and off-line, to allow the volunteer to fit the learning to their schedule (think YouTube & TED Talks) and location (at home, in the office, on the road, wherever!). Using low-cost apps like [Powtoon](#) or [Animoto](#) help you do this.

CHANNEL

As you build your training and resource strategy, think of three types of channels:

One-to-One: peer-to-peer learning. Optimize this channel through peer mentoring and targeted individual training for rising volunteer stars (e.g., individuals stepping into their first team leadership role) conducted by staff and/or a mentor.

One-to-Many: workshops, webinars, presentations. Optimize this channel by integrating adult learning and [brain-friendly](#) concepts in all your programs. Be sure to select presenters who understand adult learners and tap the brain-friendly rules. Alternately, train presenters in key concepts and effective presentation skills. Build in interactive learning options.

Many-to-Many: think the concept of user groups and online communities where the group members support each other through coaching and sharing. Optimize this channel through both a train-the-trainer strategy and following effective [community management practices](#).

Tip! When designing a training, start with a task force of key stakeholders to generate the goals, what can be measured, and what we want to measure.

Examples in Action

Building leadership courses >> The Ontario Real Estate Association created a series of leadership courses designed to assist volunteers in building skills from the first-time committee member to president of the board (see this [Associations Now post for more info](#)).

Guiding volunteers to resources >> College and University Professional Association for *Human Resources*, CUPA-HR, online [volunteer leader toolkit](#) contains a wealth of resources, tools and guidance. The issue was chapter leaders did not know where to start often contacting staff for help. Using PowToon, CUPA-HR created a [short, simple video to highlight](#) what is available in the toolkit and then separate short videos on four commonly asked questions ([financials, communications and more](#)).

Breadcrumbs in Slide Deck >> A.S.P.E.N. created a series of quick orientation recorded slide presentations for new board members with “ask me about...” breadcrumbs within the presentations providing the CEO with an opportunity to know if a board member watched them.

Incentivize chapter leader orientation >> [Nina Holman](#), chapter administrator at [Project Management Institute](#) (PMI), found a brilliant way to ensure chapter leaders are prepared for their role. They must attend a six-hour [virtual chapter leader orientation](#) if they want to qualify for a \$1,000 travel grant for PMI's annual [Leadership Institute](#).

Building Training Opportunity into annual conference with a twist >> [Community Associations Institute](#) (CAI) provided an exclusive chapter leader lounge that hosted informal and formal training sessions led by CAI staff and chapter leaders. Chapter leaders were constantly networking in the lounge since it was a safe space for peer-to-peer discussions. CAI provided food and beverage, including a barista, as well as space to work.

Speed Dating for Chapters & HQ Staff >> When chapter leaders visited [Community Associations Institute](#) (CAI) for the annual executive directors (ED) retreat, they were invited to a session at the HQ offices where each chapter ED had 8 to 10 timed office visits with different CAI staff, such as education, marketing, and membership. Even better, that feeling went both ways. CAI staff went from saying "your chapters" to "our chapters."

Leveraging your LMS >> NIGP, the Institute for Public Procurement swapped its PowerPoint deck and phone conversations for orienting board members for a "governance 101" course in the LMS. The course grounds volunteers in the association's mission, strategic plan, financials, and performance objectives. It goes one step further than the "old way" with knowledge-check components to reinforce learning.

"Learning experiences are like journeys. The journey starts where the learning is now, and ends when the learner is successful. The end of the journey isn't knowing more, it's doing more." — Julie Dirksen, learning strategy and design consultant

Resources

- Check out advice in [Where to Start in Training Volunteers](#)
- Download [The Feedback Alternative: FeedForward](#) for a look at shifting to a coaching role to develop volunteer
- Listen to the [Webinar on Pivoting Leadership Conference to Virtual](#)
- Read [4 Stories](#) from associations on shifting training
- Read [Chapter Training: Available at the moment of need](#)
- Read more on Adult Learning: [Adult Learning 101 for Edupreneurs](#) and [How to Lead a Masterclass: Effective Strategies for Teaching Adult Learners](#)

Need Help? We're here! Let Mariner help you design a training and support strategy, build a portal or design and deliver impactful training from short videos to webinars, to in-person sessions.

Power of Video

One minute of video content was found to be equal to about 1.8 million written words for training retention, according to Forrester. Now that's power!

Video creates an engaging and stickier learning experience plus supports your volunteers at the time of need.

Read the [10 Video-based Learning Trends to Adopt High-Impact Training](#) for more proof.

Beyond in-depth training, video can offer quick answers to common volunteer questions like the [Volunteer Minute Video Series](#).