

Sustainable Volunteering Museum Resource Guide

Final

1st May 2012



Introduction

The purpose of this Resource Pack is to help museums in the South East of England tackle a range of key volunteering issues by providing a number of practical tips, links to relevant information and practical examples of action drawn from the work undertaken with ten museums involved in the Sustainable Volunteering Project.

The Resource Pack is structured under the following headings:

1. Mapping volunteer roles;
2. Recruiting a volunteer coordinator;
3. Sustaining the volunteer workforce;
4. Induction of volunteers;
5. Determining the appropriate balance of paid and unpaid staff;
6. Getting feedback from volunteers;
7. Recognition of volunteers;
8. Maintaining information on volunteers;
9. Leadership and management;
10. The importance of clear volunteer policies
11. Developing a volunteer handbook.

1. Mapping Volunteer Roles

The specification of volunteer role descriptions is a very important part of effective volunteer recruitment, providing any prospective volunteer with an accurate idea of the work they will be doing and also ensuring that the volunteer is attracted by the tasks as well as the museums wider aims.

Volunteer role descriptions also help a volunteer manager to focus on what kind of volunteer they actually need and avoid mis-matching people and tasks.

By providing a clear role description or range of role descriptions through an on line service like www.volunteering.org.uk, or an organisations own website means that actual one-to-one contact with the volunteer may begin later, but the role description acts as a useful filter avoiding wasted time on both sides.

Clear role descriptions set out across all activities within the museum can also help with management of current volunteer and planning future volunteer requirements.

Although the exact layout of task descriptions varies from museum to museum, a useful set of volunteer role headings is set out below.

- Title of role
- Purpose of role
- Main activities/tasks
- Skills/Interests needed
- Training offered
- Time commitment requested
- Location
- Main point of contact/supervisor

Although many museums have task descriptions in place for some volunteer roles, it is often beneficial to undertake a structured mapping of all positions in order to help with the planning and management of volunteers.

The following case study highlights the potential benefits for Ditchling Museum of reviewing and mapping the roles of front of house volunteers.

Case Study (Review of the roles of front-of-house volunteers) - Ditchling Museum

Ditchling Museum is currently undergoing a major capital redevelopment programme. During an extended period of closure there has been an opportunity to review how front-of-house volunteers provide the public face of the museum. All front-of-house services at the museum are provided by volunteers, with staff acting in a supporting role as required.

The Visitor Services Manager led the staff team in clarifying the purpose of the role, and recognised very quickly that this is a customer service role. This enabled the staff to identify the main activities as well as the interests and qualities needed to apply for the role. To make the role attractive and as accessible as possible, most of the qualities sought are about attitudes and approach rather than skills and past experience. It is felt to be important to convey to potential volunteers that the role would suit somebody who enjoys working with people.

Volunteers in this newly defined role will be trained to be competent in using new technology, which is made clear in the section of the role description: "What we offer". This information is particularly important for existing volunteers, who will need to become conversant with new technology if they wish to continue volunteering in this role.

There was considerable discussion about the time commitment that should be asked for. From previous experience staff know that it is difficult to cover the lunch period. It is important that there is volunteer cover – otherwise staff will end up deputising for the volunteers! The Visitor Services Manager produced various models for volunteer rotas, and after discussion the team have decided to try the following pattern when the museum re-opens in 2013.

Shifts are 3 hours 50 minutes long or for a full day, 7.30hrs (i.e. only really for those perhaps wanting to gain work experience etc, but not for the average volunteer as this then means the museum can be short staffed at lunch times again!). The time commitment indicated on the role description is based on the needs of the rota.

It is hoped that, by having a clear role description reflecting business requirements, Ditchling museum will be able to attract and retain the front-of-house volunteers that it needs.

2. Recruiting a volunteer Coordinator

2.1 Context

The lack of an assigned *Volunteer Co-ordinator* was identified as a major issue by a number of museums involved in the Sustainable Volunteering Project.

However, it is also clear that the needs of each particular museum and the resources available will vary in each case.

This means that when considering how best to co-ordinate volunteer activity within your own museum through the appointment of a dedicated volunteer coordinator, it is essential to consider a number of issues including:

- What specific role should a volunteer coordinator play?
- Should they be part time or full time?
- Should they be paid or work on a voluntary basis?
- If they are paid, what would be the appropriate pay scale?
- What skills and experience do they need? and
- What is the best way to recruit?

This is not an exhaustive list, but some of the essential points that need to be considered.

The following three sections set out useful information on typical volunteer coordinator roles, pay scales and skills and experience required. This draws heavily on information from:

- Volunteering England: <http://www.volunteering.org.uk/> and
- Prospects Graduate Careers website: http://www.prospects.ac.uk/volunteer_coordinator_entry_requirements.htm

2.2 Typical Volunteer Coordinator roles

Although the specific role of a Volunteer Coordinator can vary widely between different organisations there are some common functions they will be expected to carry out.

Volunteer Coordinators/Managers are often central to an organisation's success in recruiting and retaining the volunteers needed to deliver its objectives.

Volunteering England describes the typical role of a volunteer coordinator as:

- Managing all elements of volunteering either within their own organisation or on behalf of the organisation for which they are recruiting volunteers. The role involves assessing an organisation's needs and then meeting those needs through the recruitment, placement and retention of volunteers; and
- Managing volunteers and their relationship with those they come into contact with, including employees and service users of an organisation. They also monitor, evaluate and accredit volunteers.

In smaller charities it is not uncommon to combine the Volunteer Coordinator role with another role. More specific work activities can include the following:

- Researching and writing volunteer policies and procedures;
- Liaising with departments within their own organisation or with organisations for which they are recruiting volunteers (e.g. charities and councils) to understand how they work, develop partnerships and assess their volunteering needs;
- Generating appropriate volunteering opportunities and role descriptions based on the needs of the organisation;
- Raising staff awareness of the role and function of volunteers;
- Ensuring there is appropriate support and training for volunteers;
- Promoting volunteering (internally and externally) through recruitment and publicity strategies and campaigns;
- Recruiting volunteers and ensuring they are appropriately matched and trained for a position;
- Organising rotas and providing inductions and training;
- Monitoring, supporting, motivating and accrediting volunteers and their work;
- Celebrating volunteering by nominating volunteers for awards and organising celebration events;
- Offering advice and information to volunteers and external organisations through face-to-face, telephone and email contact;
- Organising profile-raising events to attract new volunteers;

- Attending committees and meetings;
- Managing budgets and resources, including the reimbursement of expenses;
- Keeping up to date with legislation and policy related to volunteering and making any necessary modifications to accommodate changes;
- Working with multiple agencies across different sectors in order to establish good working relationships to influence decisions about volunteering;
- Generating income, writing funding bids and fundraising to make projects sustainable;
- Monitoring and evaluating activities and writing reports for funders and trustees; and
- Maintaining databases and undertaking any other administrative duties.

2.3 Typical pay rates

People who manage volunteers may be paid or unpaid.

In relation to paid roles, remuneration levels are very variable, ranging from about £11,000 to nearly £40,000 at the top end.

However, based on data from Volunteering England, typical starting salaries range from £20 - £26,000, with those with experience ranging from £21,000 to £38,000, although those working in smaller charities obviously expecting to earn less than within large national charities.

Based on a review of 25 recently advertised Volunteer Coordinator positions recorded nationally¹ pay scales for volunteer coordinators varied between £11,700 and £25,500.

2.4 Skills required

Prospects Graduate Careers website indicates that potential candidates for Volunteer Coordinator positions need to show evidence of the following:

- excellent communication skills;
- strong interpersonal skills and the ability to deal with a diverse range of people;

¹ See http://www.payscale.com/research/UK/Job=Volunteer_Coordinator/Salary

- experience of managing or coordinating projects and volunteers (paid and/or unpaid);
- an empathy with volunteers and an understanding of their needs;
- ability to inspire and motivate others;
- a great deal of resilience;
- ability to deal with information in a confidential manner and respond with sensitivity to the opinions of others;
- excellent organisational skills and the ability to manage a wide range of tasks;
- competence with administration and IT, and an ability to maintain records and produce clear written and oral reports;
- experience of working across different sectors and developing links with other agencies; and a
- flexible and non-judgemental approach to people and work.

2.5 Typical recruitment methods

Typical recruitment methods for Volunteer Coordinators include:

- Use of organisations own websites.
- Internet based vehicles for advertising including i volunteer and www.do-it.org.uk
- Local Volunteer Centres.
- Publications including:
 - <http://jobs.guardian.co.uk>
 - [Independent Jobs](#)
 - [Community Care](#)
 - [Third Sector](#)
 - [The Big Issue](#)

The following case study illustrates how the National Motor Museum Trust has successfully tackled volunteer co-ordination.

Case study (The development of volunteer co-ordination) – Beaulieu, the National Motor Museum

Volunteers in museums are often supported and supervised on a day to day basis by staff working in different departments. The experience of the National Motor Museum Trust (NMMT) at Beaulieu has shown that appointing a dedicated member of staff with responsibility for overall volunteer co-ordination can help with volunteer recruitment, recognition, and performance.

The NMMT has been involving volunteers for over twenty years, and during that period there have been some important changes in the way volunteers are managed.

In the early years of volunteer involvement, management was relatively ad hoc, with volunteers supported by staff within the collections or in the museum. A side effect of this approach was a lack of consistency in how volunteers were managed, and volunteers tended not to feel part of the museum as a whole.

In 2008 the decision was made to try and bring a more co-ordinated approach to managing volunteers. A new part-time member of staff, Helen Keisel took over the volunteer administration in addition to other responsibilities. This was a positive development, although volunteer administration was initially only a small part of the role. The process really accelerated in 2011 when Helen was formally appointed Volunteer Co-ordinator. This move had a number of advantages:

- It has raised the status and awareness of the importance of the work of volunteers;
- It formalised a main point of contact for volunteer related issues. Volunteers and staff have commented on how the communication has improved as a result of having a clear point of contact with co-ordination responsibilities;
- Volunteer recruitment and induction across the organisation is now carried out by the volunteer co-ordinator, as are other overarching volunteer management activities, such as organising training and social events, managing expenses claims and keeping volunteers updated via email; and
- Staff still supervise volunteers in the collections and the museum on a day to day basis, but they also have someone to refer to when needed for volunteer recruitment and management issues.

It is important to note that this move wasn't only about a formal job title. Although Helen is part time and still has other responsibilities apart from volunteer management, the NMMT implemented staffing changes in order to enable Helen to devote more of her time to the volunteer management aspect of her job.

2.5 Recruitment of a Volunteer Coordinator on a voluntary basis linked to an accredited qualification

One option that museums can consider is the recruitment of a Volunteer Coordinator on a voluntary basis but linked to structured accreditation as an incentive for the volunteer.

Prospects Graduate Careers website identifies a number of providers offering accredited courses for Volunteer Coordinators including the following:

- [Working for a Charity](#) offers short introductory training with a work placement, suitable for those with little or no experience of working in the voluntary sector, as well as distance learning opportunities.
- [Community Service Volunteers \(CSV\)](#) offers a range of training, including advanced-level training for volunteer managers.
- [VolResource](#) provides information on available courses.
- [Volunteering England](#) maintains an online portal for volunteer managers, signposting them to support, training and development opportunities and produces a thorough information sheet about available training.

For more information see:

http://www.prospects.ac.uk/volunteer_coordinator_training.htm

2.6 Support networks for volunteer coordinators and managers

Managers of volunteers and volunteer coordinators can contact the [Association of Volunteer Managers \(AVM\)](#) which is an independent body that aims to support, represent and champion people who manage volunteers in England regardless of field, discipline or sector. AVM has been set up by and for people who manage volunteers to raise the profile and status of those who manage volunteers, who themselves may be volunteers.

[Volunteer Management Portal](#) - information on support, training and development opportunities.

www.ivo.org is a social network that connects volunteers, charities and volunteer managers across the UK. Membership is free. ivo enables volunteer managers to network with peers by filtering results by volunteer manager status. This is done over the Internet by either 'following' others to keep in touch with what they are saying, or making contact by writing on their wall or sending them a message.

<http://www.ivo.org>

[Experts in Volunteering](#) is a project run by Greater London Volunteering working in partnership with volunteer centres to develop good volunteer management practice across London. It offers a free service to volunteer involving organisations to support them to develop their volunteer management.

[The UK Volunteer Programme Manager Forum \(UKVPM\)](#) is an email discussion network. To join, visit the home page and follow the prompts.

Various **Volunteer Managers Forums** have also been established as a result of the Volunteers for museums project, funded by Renaissance South East through their museum development programme for volunteer managers to share good practice, get advice from colleagues and discuss current issues.

3. Sustaining the volunteer workforce

3.1 Recruitment issues

It is clear that the successful future of many museums depends upon attracting suitable volunteers to replace those that leave. There are a number of aspects to the recruitment issues typically faced by museums including:

- The need to attract the overall number of volunteers required;
- The ageing profile of volunteers;
- The need for a more localised volunteer base; and
- The need to broaden the base of volunteers.

There are some key local organisations that provide good practice guidance on recruiting and managing volunteers. While these depend on the structure and funding available at a local level, your local Council for Voluntary Service and/or Volunteer Centre are probably the most accessible. An internet search, or contacting your local council should be enough to find what is available in your area.

At a national level, there is Volunteering England - an independent charity and membership organisation, committed to supporting, enabling and celebrating volunteering in all its diversity. Their work links policy, research, innovation, good practice and programme management in the involvement of volunteers. They have a Volunteering England Good Practice Bank with information and resources available to download. www.volunteering.org.uk

The following case study of Winchester Military Museums (WMM) highlights the advantages of using available resources to help tackle recruitment issues.

Case Study (making good use of available local resources to support volunteer recruitment) – Winchester Military Museums

As part of their involvement in the Sustainable Volunteering Project, WMM developed a Volunteer Policy which included the volunteer roles they had in the five museums that make up WMM. They also developed a Guide to Best Practice in Recruiting and Retaining volunteers that included information for volunteers. They were able to find and download this from Volunteering England's website. <http://www.volunteering.org.uk/goodpractice/information>

WMM also made contact with their local Volunteer Centre (VC); the purpose was to find out how to register their volunteer opportunities and what advice and guidance was available to them at little or no cost.

WMM particularly wanted to recruit a volunteer to manage the museums' educational activities. They worked as a group to identify exactly what they needed in terms of skills, qualities and commitment and to agree the support they could provide in return e.g. training and expenses. They developed a role description and drafted an advertisement.

When the paperwork was prepared and management arrangements in place, they first visited and then sent the role description and the Volunteer Policy to the VC Manager. She confirmed everything was covered and advised them to let her know when they were ready to register the opportunity so she could arrange for the opportunity to be advertised. She also offered to produce and circulate a press release to launch their recruitment campaign.

Using the resources available through the VC, the WMM Chair was reassured they were implementing best practice and got practical help to advertise their opportunity nationally and launch their recruitment campaign locally.

www.volunteercetrewinchester.org.uk

3.2 The need for clear recruitment guidelines and policies

It is important that clear guidelines and processes are in place for the recruitment of potential volunteers.

The following case study of Towner Museum highlights the benefits of a structured approach towards recruitment of volunteers.

Case Study (Clear recruitment guidelines and processes) - Towner

Clear guidelines and processes are in place for the recruitment of potential volunteers for a 'front of house' role at Towner. The recruitment process includes:

- Provision of information to potential volunteers detailing the volunteering opportunity and the type of volunteers that Towner is seeking to attract;
- An Application Form including sections on personal details, availability, motivation for volunteering, skills/experience, referee details and some information on the benefits of volunteering at Towner;
- A Face to face Interview - The decision to recruit a volunteer is taken following a 15 minute informal discussion between the potential volunteer and the Operations and Visitor Services Manager. This discussion / interview takes place before induction training commences and is primarily a means of finding out more about the potential volunteer, their suitability to the role and making sure potential volunteers understand what the role is. On occasion a telephone interview is undertaken if the potential volunteer is unable to make it to Towner before the training;
- Induction training (including CRB check); and
- References (taken up following induction training if future volunteering at Towner is supported by both parties).

Some applicants for volunteering at Towner did not have the right Front of House experience and have been unsuccessful in their application for a Front of House role. It is understood that only 4 potential volunteers have dropped out after training since opening (e.g. 4 out of about 180 volunteers). This serves to indicate that the recruitment process works extremely well.

3.3 Useful links

In order to help your own organisation tackle key recruitment issues there are a number of resources available both locally and nationally. Some of these are set out under the useful links section below.

Volunteering England Good Practice Bank. Information and resources can be downloaded at: www.volunteering.org.uk

ivo

<http://www.ivo.org> is a website that connects volunteers, charities, voluntary groups and volunteer managers.

Organisations or groups that need volunteers can create and post opportunities for people to help. These opportunities can be tagged with location (including options for nationwide or virtual) can include videos (YouTube) and images, a start and end date (or ongoing), and prospective volunteers can apply direct or via i-volunteer, as well as ask questions by writing on an optional opportunity wall. Once an opportunity is created an organisation can immediately search for available volunteers and invite them to apply.

Alternatively volunteers can be 'head hunted' by searching for specific skills and interests.

<http://ivo.org/volunteer-opportunities>

Volunteer Centres

The national network of Volunteer Centres can help Voluntary and Community groups advertise for volunteering opportunities through their own websites and on the national volunteering website, Do-it. This involves completion of a registration form.

Volunteer Centres have been provided with hardware, software and training so that they can upload their vacancies onto the do-it database.

<http://www.do-it.org.uk/>

Do-it is the national volunteering database with 500,000 registered volunteers and over 1 million volunteer opportunities.

It was launched in 2000 and is the most comprehensive national database of volunteering opportunities in the UK.

The opportunities are provided by over 350 Volunteer Centres in England and more than 200 national and regional charities.

Use of own websites to recruit

A number of museums use their own internal websites to help recruit volunteers.

4. Induction of volunteers

Proper induction of volunteers is an essential aspect of volunteer management. This should cover the museums approach to volunteering, different aspects of the operation of the buildings, safety and security (fire training, emergencies, etc), museum staff and volunteer policies and procedures, etc. It is also suggested that this type of information should be contained within a volunteer induction manual/handbook given to each volunteer as part of the induction process.

An induction checklist is a useful way of demonstrating that museums have fulfilled their responsibilities, particularly in relation to issues relating to safety and security. It is considered to be important to ensure that it is completed and signed by volunteers following induction. Depending on the roles performed by volunteers, some aspects of the training included on the induction checklist (e.g. fire training) should be a mandatory requirement before any volunteering commences. Induction procedures need to be geared to the particular requirements of the volunteer involving organisation and the specific volunteer role.

Case Study (Induction) – Towner

At Towner Museum the induction training takes about 4 hours and usually involves between 5 and 10 potential volunteers. The training, which is usually undertaken every two months, follows a standard format and is comprehensive in covering all relevant aspects of the Towner's operation and management that relate to the role carried out by volunteers. All volunteers are provided with a copy of a 'Volunteer Information, Training and Development' booklet that covers in detail all the elements covered by the induction training. Other information including Gallery Guides, Building Guides and current exhibitions and Events Guides are also provided to volunteers. Volunteers are also required to sign an induction checklist.

At Didcot Railway Centre every new volunteer now has to go through an initial induction lasting about two hours. This involves an explanation about the Great Western Society (GWS), the site, the different groups that are part of Didcot Railway Centre (DRC) and a site tour. Each volunteer is given a volunteer booklet which they have to sign to say they have received. The volunteer booklet was drawn up last year in recognition of a weakness in this area. It provides an overview of the DRC management structure and overall organisation, where things are and some aspects of health and safety (The safety requirement varies significantly depending on where volunteers are located.)

Once a new volunteer has undergone an initial induction at Didcot, responsibility for further induction and training resides with the respective project manager, which generally will focus on 'on the job' training.

Case Study (Induction into operational activities) - Didcot Railway Centre

In relation to operational activities it is necessary to be able to prove that systems are in place to train, monitor progress and assess a volunteer's ability to do job on a regular basis. Anyone at DRC in an operational role has to have an operating card which indicates the grade of their role and training and confirms they have a current medical assessment. Appropriate systems are in place to support these requirements.

For any new volunteer a medical assessment is undertaken prior to any training. It is obligatory to pass this. Different Training Officers are in place for each Grade.

Typically initial training comprises one day at the DRC site. For logistical reasons DRC try to undertake this induction with 'batches' of volunteers. The operational rule book is issued at the end of the first day by which time a volunteer should know enough to move on to second training phase, which always comprises 'on the job' training. At this stage volunteers are rostered as trainees on operating days, which is always undertaken on the basis of 1:1 supervision.

Training typically takes around a year (involving about 12 days at DRC). Where it is not practical to organise a training day with a batch of volunteers the Training Officer will do the induction when DRC is open to public.

There is a training manual that defines the process and a number of modules each trainee is required to complete. This covers the specific activity of each job and knowledge of rules to operate safely. About three years ago an exercise was started to update the training manual, but due to lack of resources this has not happened.

In practice, for grades such as Shunters and Guards, Training Officers tend to have their own updated versions of relevant modules that they use, together with associated induction documentation. In the case of Guards this comprises a 16 page booklet. In the case of Shunters it comprises an induction 'checklist'. The exact approach is determined by the relevant Training Officer.

During the course of training each Training Officer monitors volunteers who have to complete a two part exam before 'passing out'. Volunteers are then assessed on a regular basis every two years.

5. Determining the appropriate balance of paid and unpaid roles?

In the majority of organisations that involve volunteers, there are good relationships between employees and volunteers; this is helped when organisations are clear about the value both groups bring to their work and roles are created specifically for volunteers. Involving volunteers should add value to the work any organisation does and as we know, many organisations are run exclusively by volunteers.

However the need to reduce costs in the current economic climate, where jobs may be at risk at the same time as there is an increased desire to involve more volunteers, the issue of job substitution has the potential to become an issue. The following case study illustrates how some of these concerns have been addressed within **Hastings Museums and Art Gallery (HMAG)**

Case Study (Dispelling role replacement fears) – Hastings Museum & Art Gallery

Staff at Hastings Museums and Art Gallery (HMAG) did have some reservations about the Sustainable Volunteering Project (SVP) and involving more volunteers at a time when there were concerns that cuts in funding were possible. The Curator and staff were not convinced that involving more volunteers would help the team to deliver more value for visitors; there were fears about the amount of staff time that would be taken up in supporting volunteers.

HMAG wanted to explore the potential while ensure the focus remained on the needs of HMAG. The Curator decided to address any fears and concerns openly at an early stage in the project. Staff were reassured that there was no intention to use the SVP to replace any staff jobs with volunteer roles but there were some honest discussions about the likelihood of cuts in their funding from Hasting Borough Council in 2013. At the same time, staff and volunteers were encouraged to think about work they were struggling to complete that volunteers might do and to learn from the good practice developed through establishing and running The Stave Education Project in Hastings that involved volunteers in a very positive way.

The Curator drafted a Volunteer Policy and Procedures in conjunction with staff and this includes a 'statement of principles' setting out very clearly HMAG's views around job substitution e.g. "*We are committed to ensuring that staff at all levels work positively with volunteers. We will also ensure that volunteers are not used to replace paid staff*".

The Volunteer Policy has passed through Museums Committee, and will be going to Hastings Borough Cabinet (in March 2012). They consider they now have a basis on which to proceed with volunteer recruitment and have agreement that as the number of volunteers grows, the museum will appoint a Volunteer Co-ordinator to support the Curator.

As a result of the current economic climate of reduced funding and income, many organisations are thinking about the potential for volunteers to help meet the gap between demand and capacity to deliver services².

It is also clear that restructuring of services currently employing paid staff to those reliant on volunteers can be quite an emotive issue with the term 'job substitution' often applied.

It is therefore important that in relation to potential restructuring of services that the sensitivities of this issue are clearly understood.

It has been pointed out that the reality is that it is extremely rare for one volunteer to take on the entirety of one employee's work as a result of reorganisation of services and more appropriate terms are likely to be:

- Displacement – when paid staff make way for (are displaced) so that volunteers can fill their roles;
- Or 'replacement' – when work previously done by paid staff is reallocated to volunteers. In other words volunteers replace employees as the means of delivering a service.

The argument put forward is that it is perfectly legitimate for a charity to replace a service based on employees with that of a service based on volunteers if the rationale for doing this is that staff from the existing service would have had to be made redundant anyway for financial reasons, rather than this being done simply so volunteers can take over³.

Volunteering England has produced a paper on this topic and guidance can be found on the website www.volunteering.org.uk

http://www.volunteering.org.uk/images/stories/Volunteering-England/Documents/Campaigns-and-policy/job_substitution_volunteer_substitution_ockenden_strickland_2011.06..pdf

² Lynne Blackadder and Rob Jackson; 18th August 2011

³ Lynne Blackadder and Rob Jackson; 18th August 2011

6. Getting feedback from volunteers

Ensuring that appropriate procedures to ensure volunteers can have their say and influence volunteer policies and procedures is an important aspect of overall volunteer management.

As part of the Sustainable Volunteering project the Towner undertook a survey of all volunteers in order to find out more about their volunteering experience. The survey questionnaire was divided into four sections covering the following areas:

- Volunteering role;
- The start of volunteering;
- Support and development; and
- Volunteering experience.

A copy of the questionnaire used in the survey is included as **Appendix One**.

The survey achieved a high response rate (26 volunteers or nearly 75% of current volunteers) and the results revealed a very positive response in relation to all aspects of volunteering practice at Towner. For example, 100% of volunteers felt that they were made welcome when they started volunteering and 89% considered that the induction training provided by Towner was either good or very good. Overall, the survey results indicated that Towner is doing a very good job at introducing new people to volunteering at the Gallery.

It is also clear from the survey results that current volunteers really value their volunteering experience at Towner. 92% rated their volunteering experience at Towner as either good or very good and 88% felt appreciated.

Although volunteering clearly works well for both volunteers and Towner there was an important area of concern expressed by volunteers that ran through many of the responses to survey questions and this related to the need for new volunteering opportunities at the Gallery. Many volunteers did not feel that Towner provided sufficient opportunities for them to develop their skills and this is an aspect of volunteering that Towner is now seeking to address.

Overall, the volunteer survey proved to be an extremely worthwhile exercise in getting more formal feedback from volunteers on different aspects of their volunteering experience.

The following case study highlights the benefits of an exercise undertaken as part of the Sustainable Volunteering project to enable volunteers at Canterbury Museum to feedback their views on their volunteering experience to the museum.

Case Study (Volunteer feedback) – Canterbury Museum

The views of past and current volunteers indicate that the Canterbury City museums provide a volunteering experience that is valued by volunteers, particularly in terms of the wide range of skills and experience they develop as part of their volunteering role. All the current volunteers interviewed as part of the review indicated that they felt appreciated and that they felt part of the museum service. However, no formal procedures appear to be in place to recognise the contribution of volunteers. A small gift from the bookshop is given to volunteers at the end of their volunteering period, but this is something that The Collections and Research Manager has organised informally. At Christmas, a 'get together' is organised that involves volunteers and volunteers do appear to be involved with paid staff in different social activities.

On the completion of a volunteering placement with museums in the City of Canterbury, a certificate is given to each volunteer that sets out the activities that the volunteer was involved in with the Museum Service based on SPECTRUM procedures that define best practice for museums in completing 21 different activities. This is considered to be good practice and particularly useful given the priority that volunteers give to gaining work experience.

Because of the Sustainable Volunteering project, a questionnaire has been developed to enable volunteers to feedback their views on their volunteering experience to the museum. This has been sent out to all past volunteers and provides a very useful feedback mechanism.

The analysis of six questionnaire returns submitted by past volunteers indicated that volunteers all really enjoyed their volunteering experience and all indicated that they would recommend volunteering at Canterbury to others. Perhaps more importantly volunteers directly linked their volunteering experience to an increased possibility of securing job interviews and work. Those former volunteers that were now in employment indicated that the skills gained during their volunteer placement were also used in their current employment.

Interviews undertaken with existing volunteers also point to high levels of enjoyment with their current volunteering. All five volunteers interviewed appear to volunteer in order to gain experience of working in a museum environment and contribute a total of about 25 hours per week in volunteering time to the museum. A number commented that the museum service would find it difficult to provide current levels of service without the support of volunteers. Volunteers are clearly a crucial part of service provision at the museum.

Past and present volunteers all indicated that they felt appreciated working within the Canterbury museums and very much part of a team. The environment for volunteering is also considered to be an extremely good one with friendly and approachable staff and support always available when needed.

7. Recognition of volunteers

7.1 Context

The most appropriate ways to recognise the contribution of volunteers can be a highly contentious issue in some volunteer involving organisations, but none the less, one that needs to be considered carefully in the overall context of the challenges facing such organisations.

There are a number of aspects to recognising the contribution of volunteers that need to be considered and resolved, including:

- Should expenses be paid to volunteers and if so, on what basis?
- Should a 'reward' system be implemented?
- What other forms of recognition should be put in place?

In order to help museums consider these issues objectively the following section sets out what is considered good practice in relation to recognition of volunteers.

7.2 Good practice with respect to recognition of volunteers

Volunteering England indicate that whilst unpaid, volunteering shouldn't cost a volunteer anything either, so it is good practice to reimburse a volunteer for expenses incurred in the course of their volunteering.

Volunteering England also indicate that in general any reasonable expense incurred as part of the volunteering activity should be reimbursed including, but not limited to:

- travel, including to and from the place of volunteering;
- meals and refreshments;
- care of dependants, including children;
- equipment such as protective clothing; and
- administration costs such as postage, phone calls and stationery.

Volunteer Action Leeds argues that payment of volunteers' expenses is an essential element of 'good practice'. They point out that if an organisation is unable (or unwilling) to refund expenses, some people wishing to volunteer (particularly those on low incomes) may be prevented from doing so and in turn, the organisation could be depriving themselves of volunteers with valuable skills, abilities and experience.

Useful further information on expenses and volunteers can be obtained from the following sites:

www.volunteering.org.uk/information sheets and www.inlandrevenue.org.uk

7.3 Practical considerations

The above outline of good practice with respect to recognition of volunteers provides an essential context within which discussions relating to practices within your own museum should be considered.

In practice, how different volunteering organisations treat recognition of volunteers varies widely depending upon the circumstances, resources and aspirations of each museum.

However, as your own museum puts in place a wider set of recruitment methods in order to ensure a continued supply of appropriate volunteers it will be essential to be able to compete with other organisations in terms of the 'volunteer offer', otherwise it may become increasingly difficult to tackle the volunteer recruitment challenges being faced.

It is very useful therefore to have a look at how the main organisations you are likely to be 'competing against' for volunteers in the future are rewarding their own volunteers as a guide to the system of recognition you may need to consider yourself.

Case Study (Rewarding & recognising volunteers) – Beaulieu, the National Motor Museum

Volunteers at the Beaulieu receive a very wide range of benefits, including all the benefits on offer to paid staff. These include:

- Free entry to the museum and special events;
- Free friends membership (after settling in period);
- Discounts in restaurant and gift shop

The benefits are clearly appreciated by volunteers, and may help with retention, but they do not appear to be the reason why people volunteered in the first place. Newer volunteers said they had not been aware of the perks when they applied, but had been pleasantly surprised by them. One volunteer compared the NMMT favourable with another organisation they had volunteered with in the past: *"We get treated much better here with tea and coffee, travel expenses, free tickets... it shows volunteers' appreciation"*.

Volunteers feel appreciated by staff. *"Everyone I've come into contact with shows their appreciation"; "it always feels good to come in...so interesting"*.

8. Maintaining information on volunteers

Part of the work undertaken on the Sustainable Volunteering project involved investigating the possibility of developing a database that might assist museums in managing their volunteers. This was achieved through a two staged consultation process – an initial consultation on current use of information systems and a further consultation on more specific database requirements.

The results of the initial consultation with museums revealed a very mixed picture involving the use of paper based systems on the one hand to more sophisticated databases on the other. Microsoft Excel was the main proprietary software currently used to assist in the management of volunteers within the ten museums participating in the Sustainable Volunteering project. The initial consultation also revealed that museums used Microsoft Excel for quite different purposes (from straightforward listings to the storage of more comprehensive volunteer records). Some museums do not keep any electronic volunteer records.

Most museums appeared to be keen on looking at the possibility of utilising new software to assist in the management of volunteers, but had very different aspirations that were largely reflective of their current position. There were also some hurdles to overcome:

- The position in each museum is different and that it will be a considerable challenge to develop something that may suit everyone. 'One size does not fit all'.
- There was also a relatively small development budget, which also placed a limitation on the functionality of the system, particularly in accommodating bespoke requirements.
- The facility to customise a database adds considerably to the complexity of programming required and therefore the time and cost involved in its development. By contrast, standardisation of fields (e.g. pre-determined drop down menus) makes things much easier.

Six museums responded to the consultation and there appeared to be considerable agreement on the basic specification for a database. The specification for the database is included as **Appendix Two**.

A database has been developed on a Microsoft Access platform which meets the above specification. Further details on the database and associated software are available from Helen Derbyshire, Surrey, East & West Sussex Museum Development Officer at: Helen.Derbyshire@eastsussex.gov.uk

9. Leadership and management

Having a Volunteering Strategy and/or Policy is important for any organisation that involves volunteers and should clearly set out why the organisation involves volunteers and how volunteers will enable the organisation to deliver its mission and objectives.

Successful implementation of the Strategy requires leadership; whether it is museums run by Trustees, or those run by local authorities, leaders need to be aware of the role volunteers play, and have the enthusiasm, commitment, authority and power to implement and monitor implementation of that strategy. You can find information on developing a Volunteer Strategy and/or Policy at Volunteering England's Good Practice Bank has information and resources available to download www.volunteering.org.uk.

Trustees are volunteers themselves; they may have set up the museum and have multiple roles within the museum. It is easy for roles to become blurred and important that Trustees are clear about their 'strategic' responsibility to lead the organisation and to establish boundaries between different roles within the museum e.g. Trustee and also a steward at weekends. The role of the Chair is critical in providing leadership to the Trustees and in managing paid staff e.g. Curator.

The National Council for Voluntary Organisations (NCVO) provides information on roles and responsibilities <http://www.ncvo-vol.org.uk/> and can help with recruitment of Trustees through its Trustee Bank <http://www.ncvo-vol.org.uk/trusteebank>

At a local level, your local Council for Voluntary Service and/or Volunteer Centre are probably the most accessible. An internet search or contacting your local council should be enough to find what is available in your area.

The following case study sets out how Crawley Museum Society is preparing to lead a new Volunteer Strategy.

Case Study - How Crawley Museum Society is preparing to lead a new Volunteer Strategy

Crawley Museum Society needs to address issues of sustainability. The Museum has been successful in attracting funding to move to The Tree (a new and bigger museum) which will require it to 'hit the ground running' and meet the raised expectations that Museum users will have, to recruit more and younger volunteers.

The Chair and Trustees agreed there was a need for a governance review to assess what they needed to do in response to issues arising from the 'Sustainable Volunteering Project' and in particular how members would support the development and implementation of a Volunteering Strategy. A session on governance was facilitated which clarified roles and responsibilities between Trustees, staff and volunteers and identified the need to carry out a skills audit in order to properly map the skills available to the Museum Society. Trustees, staff and volunteers agreed to share what skills are needed on a regular basis so that volunteers (including Trustees) have opportunities to do other things if they want.

The Curator feels that working on governance issues, as well as the day to day operational issues, will enable the museum to move forward with more certainty. The Chair and Treasurer are taking a lead on developing the Volunteering Strategy.

10. The importance of clear volunteer policies

It is important to develop a clear set of policies relating to the recruitment, induction and management of volunteers.

There are some specific issues that should always be considered for inclusion within a Volunteer Policy:

- An explanation of what the organisation does, and why it involves volunteers in its work;
- Statement of intent - setting out the principles that will inform the involvement of volunteers – for example, this is where to state that you will not use volunteers to replace paid staff;
- Recruitment – relevant details of the recruitment process;
- Volunteer role descriptions;
- Induction and training - information about how volunteers are inducted and trained;
- Expenses;
- Supervision and support - a named supervisor and regular supervision meetings that may arise;
- Insurance;
- Equal opportunities and diversity;
- Health and safety - duty of care and health and safety policy;
- Problem-solving – the process to be followed if things go wrong and the action to be taken if a volunteer has acted in an inappropriate manner; and
- Confidentiality -Volunteers should be bound by the same requirements for confidentiality as paid staff.

Case Study (Creating volunteering policy documents) - Beaulieu, the National Motor Museum

Beaulieu has a volunteer policy in place, which is particularly clear in stating the organisation's commitment to its volunteers. Areas covered by the policy include: Recruitment; Induction & Training; Supervision & Support; Insurance; Health and Safety; Diversity; Equal Opportunities and Confidentiality.

11. Developing a Volunteer Handbook

A number of organisations have developed Volunteer Handbooks in order to provide a clear set of information for volunteers and those involved in managing volunteers.

Case Study (Volunteer Handbook) - Surrey Infantry Museum

As part of the work undertaken through the Sustainable Volunteering Project a number of key volunteering issues that need to be tackled were identified including the need:

- To ensure volunteer recruitment is sustained over time;
- To ensure appropriate procedures are in place for inducting/managing volunteers;
- For a Succession Strategy given the current dependence upon the Curator.

It was felt that the development of a Volunteer Handbook, linked to a review of current policies and procedures could serve a number of purposes including:

- Providing the reference document required to be read and signed off by volunteers to provide the museum with proof that volunteers had undergone appropriate induction;
- Help take the day to day load 'off the shoulders' of the Curator in terms of dealing with straightforward volunteer enquiries and also provide essential information for those volunteers taking on any volunteer management responsibilities.
- Be the centre piece of a succession strategy to help safeguard the museum in case funding for the Curator post ceases, or the Curator is absent or leaves.

Ian, the current Curator commented in relation to the development of a Volunteer Handbook:

'If I have a manual to follow for volunteers when I am busy I can revert to that and I won't miss out anything to any volunteer. Having a structure to follow will be the biggest benefit for me. If I leave, the next person can then follow it.'

The Volunteer Handbook that has now been produced includes:

- Summary of volunteer role descriptions;
- Identification of skills required of a volunteer;
- Summary of induction training and support provided; and
- Health, Safety and Insurance, Expenses and a Children and Vulnerable Adults Policies.

Towner Volunteer Survey

We would be really grateful if you could spare about 10-15 minutes to tell us about your volunteering experience with Towner contemporary art museum.

This survey questionnaire has been designed to be completed by volunteers that have been volunteering at Towner since it re-opened in April 2009. It does not matter if you no longer volunteer with Towner, we would still be grateful for your views.

All responses received will be treated as strictly confidential and no individual responses received as part of this survey will be capable of being identified in the report of survey received by Towner. A copy of the results of the survey will be made available to all survey respondents.

Your volunteering role

1. How long have you volunteered with Towner? (Please put an 'X' in the relevant box)

<i>Less than 6 months</i>	
<i>6 months – 12 months</i>	
<i>12 months – 24 months</i>	
<i>Since the museum re-opened</i>	

2. How did you find out about the volunteering role at Towner? (Please state)

3. What attracted you to volunteering at Towner? (Please state)

4. Is the role what you expected before you joined? (Please put an 'X' in the relevant box)

Yes	
No	
Not sure	

5. If no, please outline how your expectations of the role were different from the actual role that you carried out.

--

6. How many hours have you volunteered on average per month? (Please state the approximate number of hours)

--

7. Did you have a written role description?

Yes	
No	
Not sure	

8. If yes, did it accurately reflect what you do?

Yes	
No	
Not sure	

The start of your volunteering

9. Did Towner make you feel welcome when you started volunteering?

Yes	
No	
Not sure	

10. Did you receive all the information that you needed when you joined?

Yes	
No	
Not sure	

11. Were you introduced to all members of staff and other volunteers?

<i>Yes</i>	
<i>No</i>	
<i>Not sure</i>	

12. Were you made aware of the main health and safety procedures that you have to follow when you are volunteering?

<i>Yes</i>	
<i>No</i>	
<i>Not sure</i>	

13. How would you rate the induction training provided by Towner when you started volunteering?

<i>Very good</i>	
<i>Good</i>	
<i>Mixed feelings</i>	
<i>Poor</i>	
<i>Very poor</i>	

14. What else could the museum have done when you started volunteering?

--

15. Would you have liked anything to have been done differently?

--

Support and development

16. Does Towner provide sufficient opportunities for you to develop your skills and interests?

<i>Yes</i>	
<i>No</i>	
<i>Not sure</i>	

17. Please provide further details/expand upon your response to question 16.

--

18. Do you think that Towner should be focussing more on making improvements to employability/providing employment opportunities through volunteering?

Yes	
No	
Not sure	

19. Is there anything else that you would like to learn through volunteering at Towner?

Yes	
No	
Not sure	

20. If yes, please state what kind of learning you would like to see provided for?

--

21. Who supports you when you come into Towner to volunteer? (Please put an 'X' in all boxes that are appropriate)

<i>Other volunteers</i>	
<i>Gallery Assistants</i>	
<i>Operations and Visitor Services Manager</i>	
<i>Other Managers</i>	

Your volunteering experience

22. Have you had any opportunity to sit down and review your voluntary role?

Yes	
No	
Not sure	

23. How would you rate your volunteering experience at Towner?

<i>Very enjoyable</i>	
<i>Enjoyable</i>	
<i>Mixed feelings</i>	
<i>Not enjoyable</i>	
<i>Not enjoyable at all</i>	

24. Please outline what you think you gain from volunteering at Towner?

--

25. Do you feel appreciated?

<i>Yes</i>	
<i>No</i>	
<i>Not sure</i>	

26. Please state the reasons why you feel this is the case

--

27. Are you able to make your views known?

<i>Yes</i>	
<i>No</i>	
<i>Not sure</i>	

28. What could Towner do to improve your volunteering experience?

--

29. Do you currently volunteer with Towner?

Yes	
No	

30. Additional comments

Please feel free to write any additional comments about your volunteering experience at Towner below.

Specification for volunteer management software

1. Log in:

Access control (number + password)

2. Menu

- Volunteer record
- Volunteer profile
- Volunteer roles and availability
- Search and contact facility

3. Volunteer record

Volunteer status: Active / Applicant / Inactive / Pending

Name

- First Name:
- Last Name:
- Title:

Address

- Street 1:
- Street 2:
- Street 3:
- Town/City:
- County:
- Postcode:
- Okay to send post: (Tick box)

Telephone and email contact details

- Home telephone number:
- Okay to call home telephone number: (Tick box)
- Work telephone number:
- Mobile telephone number:
- Okay to call mobile telephone number: (Tick box)
- Email address:

4. Volunteer profile

Pre-determined fields

- Date of birth
- Gender
- Ethnicity
- Qualification level

Literal fields

- Qualification area (s)
- Skills
- Experience
- Interests

Flags (10)

Flags are used to identify certain facts about volunteers (e.g. whether they are an employee or sponsor or whether they are prepared to be considered for certain types of volunteering task). Flags are simple 'yes' or 'no' markers on a volunteer record. Flags can overlap each other and can enable some customisation of the database to individual organisational needs.

5. Volunteer Roles and availability / scheduling**Volunteer role**

- Role: listing using bespoke descriptors
- Linked Word Document Role Descriptions

General availability

- Day of the week
- Time of day: Morning / Afternoon / Evening

6. Search and contact facility

- Literal (word) search
- Searching & reporting on pre-defined categories
- Grouped email facility (based on contact details)

7. Operating Platform

PC based