



**Association of
Independent Museums**

The National Body Connecting, Supporting
and Representing Independent Museums

Success Guides

Successfully Recruiting and Retaining Volunteers





**Association of
Independent Museums**

The National Body Connecting, Supporting
and Representing Independent Museums

Success Guides

Successfully
Recruiting and
Retaining
Volunteers

Julia Hill and Bridget Yates

Front cover picture: Ian, a volunteer guide on board RRS
Discovery in Dundee, explaining the mysteries of steering
the vessel to a family group.
Dundee Heritage Trust

Successfully Recruiting and Retaining Volunteers

Over 100,000 volunteers are involved in independent museums in the UK.

Every year, many millions of people in the United Kingdom give unpaid help through formal and informal volunteering. It has been estimated that in England alone 26% of adults, or 10.6 million people, take part in formal volunteering and 35% of adults help out informally at least once a month. Women are more likely to volunteer than men and 35 to 49 year olds are the most likely age group to give formal help; younger people are more likely to give informal help, although 47% of full-time students are also fitting formal volunteering into their busy lives.

Volunteering is generally seen to be a 'good thing', and indicative of a caring society. People become volunteers for many different reasons, including a wish to make new friends or to do something with an old friend, to have fun, to 'give something back', to get out of the house, to keep their lifetime's skills and knowledge well honed, to enhance their career or as a stepping stone to employment. However, the two most popular reasons for volunteering are because people want

to improve things or help people (62%) and because the 'cause' (which could be your museum) is really important to them (40%)¹.

Over 100,000 volunteers are involved in independent museums in the UK. That involvement equates to over £100 million in value to those organisations, a contribution that represents 25% of the incoming resources of such museums². In the light of this, it is hardly surprising that a research study

(Right and next page) The Cambridge Museum of Technology and The Cambridge & County Folk Museum are joint partners in a Heritage Lottery Fund-funded project, which has increased both the numbers of volunteers and the range of activities that the museums offer.

Cambridge Museum of Technology



¹ Various sources: 2008/9 DCLG Citizenship Survey; <http://timebank.org.uk/key-facts>; UK Civil Society Almanac 2012.

² Statistics from 'Volunteering & Independent Museums' by Adrian Babbidge of EGERIA.



Pat and Natasha serving teas at the
Cambridge & County Folk Museum.
Cambridge & County Folk Museum

on volunteering in museums in Scotland concluded that 'volunteers have a crucial role to play in the delivery of museum services'.³ or that *Volunteering in Local Museums in Northern Ireland* referred to "the vital, and indeed indispensable, role volunteers play across the local museums sector in Northern Ireland."⁴ With the contribution of volunteers being so significant in independent museums, it is essential to ensure that the contribution is also effective. Whether a museum is entirely volunteer run, is run by paid staff and volunteers, has involved volunteers for years or is looking at involving volunteers for the first time, there are some key questions that it helps to consider.

- What roles do you want volunteers to fulfil?
- How will volunteers know what they are meant to be doing?

- How will you support the volunteers while they are doing it?
- What will you do if things go wrong?

There are two additional questions, which may seem irrelevant at first but which underlie the successful recruitment and retention of volunteers:

- What is the purpose and style of your organisation?
- How will volunteers integrate into the organisation?

This guide aims to consider why these questions are important and how you might structure the involvement of volunteers in your museum. Many of the suggestions are simple common sense and are not expensive in anything other than time. The first part of the guide gives some background and then covers the life cycle of a volunteer. The latter part of the guide is a series of topic based quick guides

³ *Volunteering in Museums*, a 2009 research study available from Museums Galleries Scotland.

⁴ *Volunteering in Local Museums*, published in 2010 by the Northern Ireland Museums Council and available from their website (www.nimc.co.uk).

that we hope you will find useful for specific areas concerning volunteers. At the end of the guide there is a list of places to find further resources and information. Throughout the guide, we have included hyperlinks to web pages in the hope that it will make it easier for you to find resources.

Volunteering in the UK – Context and Trends

In difficult economic times, a growing number of organisations and causes are supporting their work by the

involvement of volunteers, so competition can be fierce and it is particularly important that museums recruit and manage their volunteers effectively and with flexibility and imagination. In the period between 2006 and 2011, the number of permanent staff employed in local independent museums in Northern Ireland rose by 21%; in the same period, the number of volunteers rose by 90%.⁵ The figures will not be so stark everywhere, and this is not merely about numbers but about roles and hours given, but the role of volunteers

Young volunteers at the Long Shop Museum, Leiston, Suffolk helping to make a metal sculpture.
The Long Shop Project Trust



⁵ Data from the Northern Ireland Museums Council. It is interesting that the increase in permanent staff and volunteers in Local Authority museums in the same period was much less significant (12% and 23% respectively).

in independent museums' capacity to deliver is increasingly important. Museum governing bodies, however, need to be wary of imagining that it is acceptable to simply replace paid staff with volunteers when the budget needs cutting. The issue of job substitution is a real and thorny one, both morally and legally.⁶ Volunteers are not the same as paid employees, despite the fact that they often bring great skill and dedication to their roles.

Museums also need to be alert to the potential reduction in the availability of 'active retired' people looking for ways to enrich their retirement. Whilst many museums still benefit hugely from this group of people, reducing pensions and increasingly late retirements may well affect this source of volunteers in the future. Many retired people are now caring for grandchildren and may not be available at peak times in the museum's year. If you want to continue to benefit from this group of volunteers, a willingness to build a volunteering opportunity around their needs will be just as important as thinking about what the museum itself might need.

What is noticeable is that at the other end of the career lifetime, increasing numbers of young people are keen to use volunteering as a way of enhancing their CV and finding a route into employment. This group presents great opportunities for museums who are willing to accept volunteers who might be short term, or who cannot commit to a specific day or time, but who could be immensely useful either on site, or off site, based at home or college. Discrete projects which can be completed in a relatively short timescale and which will demonstrate particular skills, or that have good learning outcomes will hit the button here. Some museums will want to explore the idea of internships for volunteers post-university.⁷

Family volunteering is another area of volunteering which is attracting increasing attention. It is one with considerable potential for museums, for example in re-enactments or in family events and activities where children and young people can volunteer alongside their parents or guardians. The challenge for those managing volunteers within museums is to stay flexible and imaginative and to be prepared to work with the volunteer resources available, whilst also planning and structuring volunteer involvement so that it runs as smoothly as possible for all concerned.

One positive development, not just in the museum sector, has been the increasing seriousness with which the management of volunteers is taken. Volunteer manager forums, where experiences and problems can be shared and new ideas encountered, exist in many areas, as well as online.⁸ Courses and qualifications specifically aimed at those managing and supervising volunteers are more widely available and there is a wealth of resources available on good practice when working with volunteers. The *Useful Sources of Information* section at the end of this guide will give some useful pointers.

Your Organisation

When you recruit a volunteer they need to understand your museum and its purpose because they should be helping you to achieve your organisation's goals just as much as paid staff, if you have them. They need to know the point of what they are doing, so that they can do it successfully and with a sense of satisfaction. They also need to be in sympathy with the organisation's aims and ethos or they will be in danger of completing tasks in a way that seems

When you recruit a volunteer they need to understand your museum and its purpose because they should be helping you to achieve your organisation's goals just as much as paid staff, if you have them.

⁶ See *A Charter for Strengthening Relations between Paid Staff and Volunteers* on the TUC website (www.tuc.org.uk).

⁷ Internships have been the subject of some controversy. Volunteering England has produced a useful information sheet covering the issues.

⁸ E.g. UKVPM and AVM – see *Useful Sources of Information* section at the end of this guide for details.

Josh used his volunteering experience at Swaffham Museum, Norfolk as a springboard first to a traineeship, and then to a job in visitor services in a large museum.
Swaffham Museum Trust

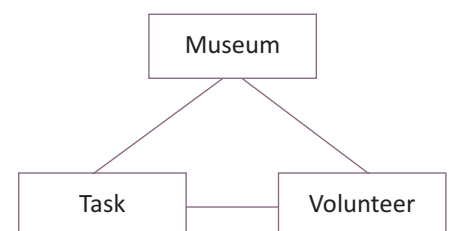


helpful to them but might be inappropriate. (Cleaning an object in the collection so that it shines beautifully for the first time in 200 years might not be what the Curator was wanting!) From the volunteer's point of view, the museum needs to have considered how and why it is involving volunteers⁹ so that it can value their contribution as something valuable and distinctive.¹⁰

We have already touched on some of the things that motivate volunteers to get involved in our introduction. Motivations understandably vary according to a volunteer's temperament, needs and circumstances, but even when a volunteer is motivated by things other than a desire to help a particular organisation, their contribution still needs to be directed to that end and it is important to be transparent about

that right from the beginning, while still aiming to match the volunteer's other motivating factors.

The relationship between museum and volunteer can be seen as triangular:



On the most basic level

- The museum has a task that needs doing
- The volunteer is willing to do the task

But underlying that basic level of operation, the organisation has to set out its expectations so that the task will make a positive contribution to the

⁹ See Volunteer Now's excellent workbook on 'Planning Volunteer Involvement' for guidance on how to consider why you are involving volunteers.

¹⁰ See Volunteering Wales website for a neat summary of what volunteers bring to an organisation. www.volunteering-wales.net/involvingvolunteers.

museum and the volunteer needs to know what the expectations are and what the resulting benefits for the museum will be. This may sound a bit ridiculous when all you might be asking a volunteer to do is to make cups of tea for the people on duty in the museum but if that is the case then you probably know how much those people value their cup of tea (if it's made correctly!) and that they then offer a warmer welcome to visitors, which makes the museum a more appealing place to visit etc. There shouldn't really be any task that you ask a volunteer to do where you can't show how it benefits the organisation as a whole.

The style of the organisation is also important as it will inform the way in which you want volunteers to operate and your expectations of them. If your museum is consciously very informal then it is necessary to recruit volunteers who can match that style and will feel comfortable with it, otherwise they will be likely to leave or to be out of synch with your ethos. It is most effective for all concerned to create a volunteer structure that matches the style of your organisation and then recruit volunteers who will thrive in that setting.

The relationship between organisation and volunteer is not, however, just about keeping the volunteer informed about what you want. If you introduce new people into your organisation then you need to consider how they will be integrated. This is partly covered by how they will be supported and supervised, but is also about how you will enable them to have a sense of belonging to the organisation: something critical to the continued motivation of many volunteers.

Will you have someone who is a point of contact for all volunteers in the organisation? Such a person can not only ensure consistency of treatment for all volunteers but can also

consciously make it a point to listen to the views of volunteers and feed back ideas and suggestions to the relevant colleagues. You may also like to consider how much you involve volunteers in planning particular projects rather than setting them up first and then recruiting volunteers to take on tasks. Such involvement is very popular with funders, can give volunteers a great sense of ownership and, when managed properly, can ensure maximum benefit from a range of skills and viewpoints. Of course, when managed badly it is a recipe for chaos so it doesn't pay to be totally laissez faire, but whilst managed involvement may take longer than dictation it can ultimately be more productive for all.

You may like to consider whether you have a regular forum for volunteers to ask questions and make suggestions to those who lead the organisation or you may, like some museums, decide to have a volunteer representative attending Trustee meetings. Such a representative would not have a right to vote and would not be present for anything sensitive like staff remuneration or disciplinary issues but can help integrate volunteers into the heart of the organisation and make it clear that their contribution is taken seriously. If you are in a museum that has a mixture of paid staff and volunteers, you would need to consider whether staff had parallel access as it would not be beneficial for anyone if volunteers were seen to have more influence than paid staff!

Recruiting Volunteers

Recruiting is a time consuming process and you want to end up with the right person in the right role (in the right organisation) otherwise it will be frustrating and a waste of time for all concerned.

Recruiting is a time consuming process and you want to end up with the right person in the right role (in the right organisation) otherwise it will be frustrating and a waste of time for all concerned.

A role description is a really good starting point when thinking about recruiting volunteers and it provides the focus both for the recruitment and the retention of a volunteer.

The outline of the process is

1. Identification of volunteer role
2. Advertising the role
3. Dealing with enquiries
4. Selection
5. Induction and Introductory Period

1. Identifying the Role

A role description is a really good starting point when thinking about recruiting volunteers and it provides the focus both for the recruitment and the retention of a volunteer. A role description is similar to a job description for paid staff but should never be called that as volunteers are not employees and to imply that there is a contractual relationship can cause legal complications. Organisations vary in what information role descriptions include and it is possible to find guidance and sample role descriptions on the web,¹¹ but as a minimum they should give a clear idea of

- The purpose of the role
- What the role will require them to do

Some role descriptions also

- Name the volunteer's supervisor for that role
- Indicate the level of commitment required
- Give other details about when and where the role will be undertaken
- Let the volunteer know what the role offers them.

A standardised format for volunteer roles makes them much easier to write. It also makes things consistent, as well as underlining the point that all roles are equally valid within the organisation, so helping to avoid a damaging hierarchy of volunteering.¹²

Some roles may be undertaken by a number of volunteers, others may be designed for a particular volunteer with a skill needed by the organisation: in both cases drawing up a role description should involve thinking through

- What the role is and what its purpose is
- What skills and aptitudes the role requires
- Whether the role is long term or short term
- Whether the role is distinctively different from paid roles within the organisation
- Why the role is suitable for a volunteer
- Whether the physical resources are available to support the role (money, equipment, space etc)
- Who is responsible for what the role is aiming to achieve
- Whether those who will support and supervise the volunteer have the time and skills to do so
- Whether everyone who might have an impact on the success of the role has been consulted

Considering why you are making it a volunteer role rather than a paid role is particularly important in an organisation where both paid staff and volunteers are involved. It is important that paid staff don't feel that their jobs are threatened by volunteers or that volunteers feel they are being exploited. It is good practice to have clear distinctions between paid and volunteer roles: this is achieved partly through the language that is used (role not job, volunteering not work etc¹³) but can be underlined by other distinctions, especially those connected with levels of responsibility.

¹¹ For example, <http://www.oursharedresources.com/> has samples and templates but do remember that these are shared resources rather than official guidance so don't suspend your own judgement!

¹² The exception to this is Trustees. The Trustee role, as an unpaid role, is voluntary but Trustees necessarily have particular responsibilities and status within the organisation. If a Trustee is going to take on additional voluntary roles within the organisation, those roles should be undertaken separately from the Trustee role, in order to ensure the supervision of volunteers in non-Trustee roles is consistent and fair.

¹³ The Merton Volunteer Centre (www.volunteercentremerton.org.uk) has a useful table showing words to avoid and to use when working with volunteers.



An example of short and snappy volunteering! Swaffham residents drop in to their local museum in Norfolk for coffee and help to identify photographs in the museum collections.

Swaffham Museum Trust

2. Advertising the Role

Once the role description has been drawn up, you are in a strong position to advertise. Where you advertise will depend upon the role and who you imagine might be interested but some of the options are

- Leaflets and posters available on site and in other local places where people gather.
- Word of mouth – let your existing staff and volunteers (and members, if you have them) know that there is a new volunteer role available and if they are positive about volunteers in your organisation they will advertise the role for you. Volunteers might even want to change roles or take on an additional role themselves.
- Facebook and Twitter are increasingly parallel to word of mouth, especially if you are aiming at younger volunteers. If your museum doesn't make use of social media, then it's worth thinking about. If you don't have the faintest idea then ask your volunteers – one of them will either be clued up themselves or have a (probably younger) relative who can tell you how it all works!
- Website – if your museum has a website, keep volunteering opportunities on it and make it easy for people to apply. If you don't have a website, think about setting one up as the internet is increasingly the first place people look for information about volunteering.
- Volunteer Centres¹⁴ – they advertise roles locally and nationally, as well as being an invaluable source of information and advice.
- Universities and Colleges – many are keen to encourage students to volunteer and have staff dedicated to finding opportunities for students on all courses. Students on museum-related courses are often keen (not to say occasionally desperate) to get relevant experience to add to their CV.
- Local press – either by paying for an advertisement or by holding a volunteer event to generate coverage.
- Social needs organisations – there are many organisations with clients wanting to build up their confidence through suitable volunteering opportunities.

¹⁴ See the *Useful Sources of Information* section at the end for how to find your nearest Volunteer Centre.

Volunteers attending a SHARE Museums East training seminar in ceramics.
SHARE Museums East



- vInspired – a scheme to encourage 14-25 year olds to volunteer. Organisations with opportunities for young people can sign up to advertise through the vInspired website.¹⁵

The advantage of advertising widely is that you are more likely to be able to establish a diverse group of volunteers, which is healthy for the organisation and often more enjoyable and stimulating for all involved. Failing to introduce new blood into an organisation can cause stagnation at best and terminal decline at worst: involving volunteers can be an ideal way of introducing new blood.

Before you advertise a role you need to have a clear idea of how many volunteers you are looking for and what the rest of the process will entail; as well as having the relevant paperwork and recruitment timetable in place. If you are looking for a number of volunteers you may decide to try to organise the process so that some stages are done in groups rather

than individually. It can be helpful, and less time consuming, to organise a session when those interested in the role come and find out more about what it involves and about your organisation and how it involves volunteers. If you decide to have such a session, you obviously need to have decided on the date before the first enquiry.

3. Dealing with Enquiries

At this stage, the benefits of a well prepared role description will be obvious: you have something to send those who are interested in the role and you have already worked out the requirements of the role.

Over and above the details of the role description, during this stage you will need to know

- Whether you going to ask volunteers to complete an enquiry form
- Whether you are going to conduct informal interviews – and, if so, when and where

¹⁵ Visit <http://vinspired.com/about/organisations> to see how to sign up to advertise your opportunities.

- Whether you will be asking for references and whether a safeguarding check¹⁶ is required
- How you will let people know whether you think they are suitable for the role
- When you will be expecting them to start

Enquiry Forms

These need to be treated with caution. Many people who want to volunteer do not want to spend lots of time filling in forms: either because they have done enough of it in their paid work or because they find forms intimidating. Despite this, a simple form can be very useful as it is a way of getting some basic details on record, such as

- Contact details
- How often they are hoping to volunteer
- Why the role is of interest
- What sort of skills and experience they are offering

Like most things connected with volunteers, a balanced approach is best. You can offer to send an enquiry form but if the person seems reluctant, or you judge that they might find it difficult to complete, there is no reason not to just ask them a few questions to elicit the same information without troubling them with the actual form. If your website is cutting edge then you might like to put a form directly onto the website but it's still good to have an option where potential volunteers can get in touch with a human being to ask some questions about the role.

4. Selection

Selection is the hard edge of the recruitment process because if it is to have any meaning then there has to be

the possibility of saying no to a willing volunteer.

On the occasions when the answer has to be no it will sometimes be possible to help a volunteer see that the role is not suitable for them and to make the decision for themselves. If that is not possible then you can comfort yourself with the thought that saying no at this stage is infinitely easier, for both of you, than asking them to leave at a later date. Like a lot of volunteer management, this process requires you to be firm but kind.

Interviews

In a government survey of volunteering and charitable giving,¹⁷ only 24% of those involved in regular volunteering had been interviewed. Interestingly, of those who had been interviewed, 99% did not mind being interviewed at all and the remaining 1% only minded a bit (rather than a lot). Volunteer interviews should be informal but they show that you take the volunteer role seriously, help to make the recruitment process fair and transparent and give a volunteer the opportunity to explore both whether the role is suitable for them and within their capabilities and whether they want to become part of the organisation. They give the organisation the opportunity to do likewise and also to gain an insight into what is motivating the volunteer to offer their services. By taking the opportunity at this stage to understand the volunteer's motivation, the organisation gives itself a better chance of finding the best ways to motivate and retain a volunteer in the future: if a volunteer is motivated by wanting social interaction then a role which offers contact with people is going to be more satisfying for them; if a volunteer wants to learn new skills

Things to explore at an interview

That the volunteer

- Understands what your museum aims to achieve (and is supportive of it)
- Understands what the role involves
- Is happy to operate within the context of the museum's volunteer agreement¹⁸
- Has the ability to fulfil the role, with training and support if necessary
- Will be available at times that fit the role
- Is going to be available for a length of time that suits the role

That the organisation

- Understands what is motivating the volunteer to become involved
- Understands how it can best support the volunteer to fulfil the role – including any particular needs
- Has been clear about the set up for volunteers – e.g. expenses, level of contact with staff and volunteers, involvement in the organisation, etc

¹⁶PVG (Protecting Vulnerable Groups) checks in Scotland. In England, Northern Ireland and Wales CRB checks have now become DBS (Disclosure and Barring Service) checks.

¹⁷ Helping Out: A national survey of volunteering and charitable giving. Published September 2007.

¹⁸ A Volunteer Agreement is a statement of mutual expectations between the volunteer and the organisation. It is not a binding contract but is a very useful document. See information box in the section on inductions below.

An induction should include

- An introduction to the organisation, its purpose and structures
- An introduction to the organisation's policies and procedures
- Health and Safety induction – including emergency procedures
- Role induction – and any initial training that is necessary
- Practicalities, such as an introduction to the site, other staff and volunteers, where to find things and anything else that a volunteer might feel uncomfortable if they didn't know
- An establishment of mutual expectations – including an acceptance of the Volunteer Agreement as an expression of those expectations.

Volunteers should come out of an induction knowing

- What they are going to be doing
- How they are going to do it
- Who is going to support them
- How their role will benefit the organisation
- That the organisation actively wants them to have a positive and worthwhile experience.

then they might not be happy staying in one role indefinitely and might need opportunities to take on new roles. Some volunteers may have been attracted to the organisation by one role but it may become apparent during an interview that another role might be more suitable.

References and Other Checks

References are another opportunity for the organisation to show the volunteer that their role is going to be taken seriously, as well as giving the organisation a wider picture of the volunteer's abilities than might have come out in the interview. Consistency is obviously essential, so either ask for references for all roles or for none.

DBS (Disclosure and Barring Service) checks for England, Wales and Scotland,¹⁹ or PVG (Protecting Vulnerable Groups) checks in Scotland, will only be necessary for some roles but it saves confusion and embarrassment if you establish early on in the selection process that volunteers are willing to do a DBS/PVG check, if it is necessary. This could simply be included on the enquiry form as a tick box. Bear in mind that it is illegal for an organisation to do DBS checks on all volunteers, irrespective of their role, 'just to be on the safe side'. If selection is dependent upon satisfactory references and PVG/DBS check then that should be made clear before the interview is finished.

Induction

Induction, whether it is done individually or in groups, is an indispensable part of recruiting and retaining volunteers, as well as being

one of the requirements of the Accreditation process.²⁰

In an induction the organisation has the opportunity to establish a firm foundation for the volunteer's future involvement. It not only gives the opportunity to cover such practical essentials as Health and Safety briefings and Child Protection guidelines but it also sets the tone for the future. This is the chance to make it clear how the volunteer's contribution will benefit the organisation, what the volunteer can expect of the organisation in terms of support and supervision and what the organisation asks of the volunteer. It's no good expecting volunteers to read and absorb hundreds of pages of information and guidelines but a volunteer agreement and a short handbook including basic information, and letting them know where to find further information, is useful.

As with all work involving volunteers, the balance has to be struck between being organised and formal enough to get the job done but not being so over the top that the volunteer is overpowered and de-motivated. How that balance is achieved will depend on the background, experience and expectations of the volunteer, as well as the style of the organisation, but an effective induction lays a foundation that will make it explicit that it is reasonable for both the organisation and the volunteer to have certain expectations.

You may choose to have an induction day when all the information and training is covered, or you may choose to have an induction period which includes an introductory period (equivalent to a probationary period for paid staff) and only ends when that

¹⁹ On 1 December 2012 the Criminal Records Bureau (CRB) and the Independent Safeguarding Authority (ISA) merged to form the Disclosure and Barring Service (DBS). As a result 'CRB checks' became 'DBS checks'. Not all roles that were suitable for a CRB check will require a DBS check, so it is important to clarify which, if any, roles in your museum qualify. See the practicalities box on Working with Children and Vulnerable Adults and the *Useful Sources of Information* section at the end. In Scotland, safeguarding checks are PVG checks, managed by Disclosure Scotland.

²⁰ Requirement 1.7.3 of Accreditation calls for 'formal induction procedures for new recruits to ensure that all members of the workforce have basic information about the museum and understand their role in it'.



Volunteers in costume at a special World War II day at Scotland's Jute Museum @ Verdant Works, Dundee.
Dundee Heritage Trust

period is successfully completed. At the end of the induction, some organisations ask volunteers to sign a record of their induction. This can be a useful way of recording that a volunteer has been informed about important policies and procedures and it is an opportunity to check whether they have questions about any of the information given.

Introductory Period

The benefit of an introductory period is that it gives both the volunteer and the organisation a chance to settle into the

relationship and it is a period when extra support and supervision can be provided as a natural and explicit part of the process. If, during that period, it becomes apparent that the volunteer will need some extra support or training then that should be discussed before the period ends and, if necessary, the introductory period should be extended. If, at the end of the period, either side decides that things are not going to work then it is much easier to say goodbye at that stage when the explicit purpose of the period was to try something out to see if it worked for everyone.

Volunteer Handbook

There are no hard and fast rules about the contents of a Volunteer Handbook. Many organisations provide individual volunteers with their own personal folders which can contain items such as:

- A 'Welcome' leaflet
- Contact details for the museum and for their supervisor or supporter
- An induction checklist
- A copy of the Volunteer Policy and Volunteer Agreement
- Brief information about health and safety, expenses, insurance and confidentiality.
- Mission statement – if your museum has a simple mission statement then it can work well to put this at the beginning of the handbook, or even on the cover, so that all volunteers know the purpose of the organisation they are joining.

It is also extremely useful to have a single source of information about the museum readily available to volunteers. This can be kept in a common space such as the kitchen or club room. This 'Handbook' could be a ring binder or a box file – it doesn't need to be a leather-bound book and in fact keeping it easy and cheap to update is important for its usefulness. The contents could include information about the museum and copies of any policies or guidelines that directly concern volunteers but would make their basic handbook exhaustingly long and unlikely to be read.

Volunteer Agreement

The agreement²¹ can either be included in the handbook or can be a separate document but is a requirement of Accreditation,²² as well as being a useful clarification of the mutual relationship between museum and volunteer and invaluable as a reference point if things begin to go wrong.

The agreement should not be signed and must not imply a contract of employment. It should have a section on what the volunteer can expect from the museum (induction, training, insurance, support and supervision, expenses etc.) and a section on what the museum expects of the volunteer (e.g. fulfilling the role to the best of their ability, letting someone know if they are unable to come for an agreed session, following policies and procedures, accepting training and supervision for the role).

Retaining Volunteers – an on-going process

Retention is really about feeding on-going motivation, sometimes literally with cake! Volunteers are not rewarded financially, are under no contractual obligation and can therefore only be retained by a positive experience. Whilst it would be wrong to suggest that there are no points of overlap, volunteer management is therefore distinctively different from the management of paid staff who can be motivated by their pay packet, work related benefits and contractual obligations even when things are not going particularly well.

The motivation to continue volunteering is not necessarily the same as what motivated a volunteer to offer their help in the first place. Helping Out²³ gave the top five benefits of volunteering, identified by volunteers, as

- Satisfaction from seeing the results (97%)
- Enjoyment (96%)
- Sense of personal achievement (88%)
- Meeting people and making friends (86%)
- The chance to do things that I am good at (83%)

The rewards that volunteering offers are real and important and need to be emphasised, not by telling volunteers how lucky they are but by being mindful of the benefits that matter to them and trying to ensure that they experience them. This can be achieved by a good support and supervision structure.

Support and Supervision

Volunteers need support and supervision to accomplish what their role requires, to be of use to the organisation and to enjoy their volunteering. How that support and supervision takes place will depend on

²¹ Volunteering England's website has useful guidance about Volunteer Agreements.

²² See Accreditation Requirement 1.7.2 for more detail. The accreditation standards are available to download from the Arts Council website (www.artscouncil.org.uk).

²³ The National Survey of Volunteering and Charitable Giving, published in 2007.



Preparing for a school event in the Victorian kitchen at the Priest's House Museum, Wimborne, Dorset.
Priest's House Museum Trust

the organisation's style and structure, as well as the needs of the volunteer.

Support involves taking an interest in volunteers, understanding their needs and helping to keep them motivated. This requires an understanding both of why they volunteered in the first place and why they continue to volunteer. Some volunteers want to chat and others just want to do the task: this doesn't mean you should avoid the latter and spend the whole time chatting to the former but it does help to remember the individual characteristics of your volunteers as well the organisation's needs.

Supervision is part of the support you offer but also something additional. You have to know what a volunteer is doing if you are to give them feedback, let them know that they are valued and respond to any concerns they may have. But you also need to know what they are doing because it needs to be

of benefit to the organisation. Failure to supervise a volunteer may mean that a volunteer has little confidence that they know what they are meant to be doing or, conversely, that they feel certain about what they are doing but it fails to match what the organisation actually requires!

Effective supervision is helped enormously by having developed a role description, having ensured that volunteers have inductions and by having a volunteer agreement. The resulting clarity about the role and its purpose, as well as the clarity about the expectations of the organisation means that if a volunteer is not doing what was asked then you have something to refer back to, rather than suddenly realising that you had completely incompatible understandings about what was required.

Each volunteer should have a named supervisor so that they know who to go

Support and Supervision Basics

- Make sure that volunteers have everything necessary to fulfil their role
- Notice what they are doing and give them constructive feedback
- Make sure they know the value of what they are doing and feel valued (words and refreshments both help)
- Listen to them and meet their needs where possible
- Be alert for problems so that you can help resolve them swiftly
- Remember why they volunteered in the first place
- Be aware that their needs may have changed over time and that their role might need adapting or changing
- Offer training that will help them in their role
- Pay their out of pocket expenses
- Keep them in the loop – make sure that you let them know what is going on – face to face, by phone, by e-mail, by newsletter, by notes or whatever way works for you and for them.
- Protect them from ‘office politics’.
- Don’t forget they exist, they will notice if you do.

to if they have questions or concerns and so that there is someone who the volunteer knows will take an interest in what they are doing and has the right to give them direction. In some cases this named supervisor will be another volunteer, in others it will be a paid member of staff: this distinction matters far less than that they have an obligation to care for the volunteer and to support and supervise them in a way which continues to motivate the volunteer and helps them fulfil their role within the organisation.

Developing your Volunteers²⁴

Part of on-going support and supervision is training. The level of training support that you will want to give to your volunteers will depend on the sort of task that they will be doing at the museum. The training required by a regular volunteer working to help lay railway tracks will be entirely different from the occasional volunteer washing up at an event day. All volunteers will have induction training, which we have discussed earlier, and that can include the training to do the actual role. It is likely that this initial training will continue into the introductory period. It could be one to one training, such as coaching, mentoring or buddying with an experienced volunteer; or delivered in a group session if you have a team of people starting on the same project at the same time. One key thing to remember is that people learn in different ways²⁵ and at a different pace, so aim for a range of methods of training. Volunteers should only be offered training that is relevant to their role, otherwise it could be seen as a benefit in kind: you can’t send the

archive volunteer on a flower arranging course if you are not planning to incorporate flower arranging into the role. Training, especially when it is in groups, not only helps to refresh volunteers but is also an excuse to get people together and often doubles as team building, especially where volunteers aren’t normally on a shift together. Don’t forget the biscuits!

The training and experience that you can provide for younger volunteers may be their key reason to join the museum, and you may want to investigate whether the skills and knowledge learnt can be accredited in any way, for example through NVQs / SNVQs²⁶ or other competence based qualifications. Sources of information could be a local college, Job Centre Plus, or the Volunteer Centre. Do try and provide evidence of what they have learnt at the museum for their CV even if this involves creating your own certificates. Conversely, the word ‘training’ can be a barrier for some older volunteers, who may feel that they had quite enough of that at work, thank you. It’s worth remembering that training and development can be delivered in many different ways, including through ‘softer’ options such as visits to other museums; the opportunity to share a project with, or work alongside, someone else or even short talks by colleagues over coffee and cake. If you realise your volunteers hate training then call it something else.

Much of the training that you will want to cover can be provided in-house, but try to be alert to opportunities provided locally which your volunteers would enjoy and benefit from but which need not necessarily be task

²⁴ Museums Galleries Scotland has an excellent downloadable resource book about training, learning and development on its website (www.museumsgalleryscotland.org.uk/publications). It contains some very useful tools to use in planning and with volunteers.

²⁵ Often called ‘learning styles’ – see www.inspiringlearningforall.gov.uk resources for a sheet to discover your learning style.

²⁶ The Victoria and Albert Museum can provide NVQs for external museum staff and provide external assessment, see <http://vamnvqcentre.co.uk/index.php>. The subjects they cover include customer service, retail, cultural heritage. See also <http://www.skills-thirdsector.org.uk/> for information on the development of National Occupational Standards for the Third Sector.



The work of the volunteers in the beautiful walled garden at the Priest's House Museum, Wimborne Minster, Dorset certainly enhances the visitor experience.

Priest's House Museum Trust

focussed. SHARE Museums East²⁷ and the South West Federation of Museums and Galleries²⁸ are two of the nine organisations who have received Arts Council England museum development funding to enable them to deliver high quality free training to museums in their area. If training is being provided for your paid staff as a group, for example in fire safety, do consider whether you could give the opportunity to volunteers as well. Posting information round your volunteer e-group or pinning a notice up in the rest room will give everyone the opportunity to apply.

In summary, many volunteers stay involved in museums because of the opportunity it gives them to continue learning, and acquire and use new

knowledge and skills, with a group of people they respect and value. It is always worth investing in volunteer training and development.

Communicating with Volunteers

In amongst all the recruitment, induction, training, support and supervision is communication. If you find an organisation that thinks that communicating effectively is easy then we'd like to know! Any relationship, especially one that is not contractual, relies on good, two-way communication. How you communicate with your volunteers will depend on your museum and your volunteers but it has to be done and it has to be done regularly. If you find

²⁷ <http://www.sharemuseumseast.org.uk/>

²⁸ <http://www.swfed.org.uk/training>

How you communicate with your volunteers will depend on your museum and your volunteers but it has to be done and it has to be done regularly.

that none of your volunteers read the information that you send them then ask them what would work better. Communicating regularly does not mean filling their inbox with inconsequential information – there are endless ways of communicating but here are a few to start:

- Talk to your volunteers and listen to them – someone should be thanking them every time they turn up to volunteer. When they look harassed, check if there is a problem.
- If you haven't seen a volunteer for a while or they haven't turned up for a shift then give them a ring to check they are alright – starting by making it clear that you are concerned about them.
- Invite them to meetings and social gatherings. If you have paid staff as well, then try to make sure that some at least of these gathering include a mixture of paid staff and volunteers.
- Consider having an annual check-up. Make some time to see whether they are enjoying their volunteering and whether they have any comments to make that would help you improve your volunteer scheme. If you really can't do this in person, you can always phone or e-mail them.
- You could send out a short questionnaire to get feedback.
- Why not have a session where volunteers can ask the museum management questions? This is also a chance for the museum management to thank the volunteers publicly.
- Try a regular newsletter or e-newsletter²⁹ to update volunteers (and staff if applicable) on what's going on. If some volunteers don't have e-mail, make sure you give them a printed copy.
- Have occasional update sheets so that you have a method of communicating between newsletters.

- Have meetings where volunteers can find out what other volunteers do – it's often quite hard for them to find this out as they're so busy with their own role.
- Use Twitter and Facebook, especially if you have younger volunteers.
- Have times when really all you do is feed them, thank them and listen to them.

Losing Volunteers

Losing volunteers is not always a bad thing but ideally you only want to lose them for positive reasons. Some volunteers may well only want to volunteer for a limited period and losing them is not a failure, especially if they move on with an enhanced CV and as an ambassador for your museum. A mixture of short-term and longer-term volunteers can help keep an organisation fresh and gives ideal opportunities to keep reassessing whether things need changing. If your volunteers are just drifting away, or leaving because they are unhappy then you obviously need to assess whether the problem lay with recruiting the wrong people or in the way they were supported and supervised. Such insights will help you to keep fine tuning your programme.

When it goes Wrong

Hopefully, if you recruit carefully, induct well and provide good support and supervision for your volunteers then most of the time both you and they will be happy. This will not, of course, always be the case and it pays to consider what you will do if things don't go smoothly.

When things are not working, listening is the best starting point, whether the problem is one perceived by you or by the volunteer. It may be that the

²⁹ Remember to use blind copy BCC when e-mailing groups of volunteers so that you are not accidentally passing on people's e-mail addresses without their consent.

volunteer has misunderstood something and all that is required is an explanation. It may be that the volunteer has personal problems that are causing strain and that they need to reduce their volunteering or take a break. It may be that they need more support or supervision than you realised and you need to find a way of offering more without undermining their confidence.

Behind all these informal approaches to problem solving there should be a Problem Solving Procedure, which allows you to do what its title suggests. The equivalent for paid employees would be a Grievance and Disciplinary Procedure but it is very important that there is a different procedure for volunteers and that it recognises that volunteers are not employees and not under any contractual obligation.

You may never have to use your procedure but you don't want to have to write one in the middle of a crisis, so it is worth doing it in advance.³⁰ Keep it simple and fair and don't let it dominate your relationship with volunteers but neither be afraid to use it if more informal solutions fail.

A Volunteer Policy

And lastly we come to what should really come first! If your organisation involves volunteers, or plans to involve them, it really needs a volunteer policy.

"Quite simply, a volunteer policy is the foundation on which your organisation's involvement of volunteers should be based."³¹

A volunteer policy does not need to be a long document; the shorter and more succinct it is, the more likely it is to be treated as a working document and not just something to be produced for the purpose of claiming a grant or complying with the Accreditation

Standard. For many small museums a single side of A4 will be quite sufficient. Larger museums will have developed a standard layout for all their policies and the Volunteer Policy should fit comfortably in that group.

It can be helpful to think about it as three sections:

- An introduction which covers what your organisation does and why it involves volunteers
- A brief statement of principles such as "The museum will not introduce volunteers to replace paid staff" or "All volunteers will be encouraged to contribute to the organisation and development of the museum through the Volunteers' Forum"
- A section on practicalities which will include references to
 - Recruitment
 - Induction and training
 - Payment of expenses
 - Supervision and support
 - Insurance cover for volunteers
 - Equal opportunities and diversity
 - Health and Safety
 - Problem Solving procedures
 - Confidentiality

There is a great deal of information about writing volunteer policies and even some examples available on the web – please see the *Useful Sources of Information* section at the end of this guide.

Is it Worth even Starting?

Will you definitely be able to do all these things perfectly and at once? No, probably not, but that shouldn't put you off making a start.

If you don't already involve volunteers in your museum, it may be best to start with a pilot scheme concentrating on just one role and setting a definite time limit for reviewing how things have

A problem solving procedure should

- Help protect volunteers from unfair treatment
- Help protect the reputation of the organisation
- Be clear and open
- Cover what to do if a complaint is made by, or about, a volunteer or if there is an issue with the volunteer's performance of their role
- Stress that most matters will be dealt with informally through support and supervision
- Be simple – endless stages can be grim for all concerned. Three stages are sufficient.
- Include an option to require a volunteer to stop volunteering
- Outline anything that would necessitate a volunteer being immediately required to stop volunteering

³⁰ Volunteering England has an excellent Information Sheet on Problem Solving for Volunteers.

³¹ *Get it Right from the Start*, The National Centre for Volunteering, 2002.

At whatever stage of working with volunteers your museum is, reviewing and adapting is a sign of a healthy organisation, not a sign of multiple failures!

gone. The advantage of a pilot scheme with a definite finish point is that if it doesn't work you can bring it to an end, learn the lessons and start again without a great sense of failure.

If your museum already involves volunteers then you can involve them in gradually reviewing how things are going and whether changes could be made. This is obviously a more delicate task than starting from scratch and you have to find a way of making it plain that there will be changes but that all those affected can be part of the process. As when starting from scratch, a pilot scheme to try new ideas can be less threatening than wholesale change, especially if your organisation has a significant number of established

volunteers who are not particularly desirous of change.

At whatever stage of working with volunteers your museum is, reviewing and adapting is a sign of a healthy organisation, not a sign of multiple failures!

Sometimes it's easy to think that the real benefit of volunteers is that they are free. In reality they are not totally free, once you have paid their expenses, sent them information and taken time to manage them. The joy of involving volunteers in your museum is that every time they appear it is because they have chosen to be there and that enthusiasm for your museum is a gift worth cherishing.

Quick Guides

Who Can Volunteer?

Really, if you have the right roles, pretty much anyone can volunteer but there are specific things to be aware of when working with certain groups.

Volunteering England has a useful information sheet on who is allowed to volunteer covering the groups below. Having a diverse group of volunteers can be hugely energising for your museum.

Children and young people

- Legally a child is defined as someone who is under 18 years old, or under 16 if employed.
- Children are considered a 'vulnerable group' so the museum must be aware of their responsibilities under the Protection of Children Act, 1999.
- It is particularly important to undertake robust risk assessments when children under 16 might be involved and it would be good practice to share this information with their parent or guardian when seeking their consent.

People receiving benefits³²

- Volunteering can be a lifeline for people who are, for whatever reason, currently unable to work. It can give self-esteem and sometimes a route into employment.
- The Department for Work and Pensions has produced (in 2010) a useful booklet on *Volunteering While Getting Benefits*.
- In all cases you should ensure that the volunteer has discussed their wish to volunteer with their benefits adviser or with Jobcentre Plus and, in certain instances, their local council, *before* starting at the museum.

- Volunteers on state benefits or Job Seekers Allowance (JSA) must not receive any money beyond the exact repayment of expenses and you should be careful to give them a record of the expenses paid.
- There is no maximum number of hours for people claiming **Job Seekers Allowance, Incapacity Benefit or Disability Living Allowance**. Volunteers claiming JSA must be actively seeking work and able to attend interviews.
- **Refugees and Asylum Seekers** can volunteer with not for profit organisations and they can receive expenses in line with your other volunteers.
- **Citizens of pre-2005 EU Member States** are allowed to volunteer as are citizens of the **European Economic Area**. If there is any doubt about someone's right to volunteer, the museum or the volunteer should check with the UK Border Agency.

Ex-offenders

- Nacro (www.nacro.org.uk) and Volunteering England have developed a guide to *Involving Ex-offenders in volunteering*.

Insurance note

There is no maximum age limit for volunteering but check your insurance policy to make sure that it covers the ages of all your volunteers. Public or Employer Liability Insurance does not automatically cover people under 16, so it is also important to check that there is no lower age limit in your policy.

Similarly, if you involve volunteers with a criminal record, check with your insurance company whether or not they need any particular information about the involvement of the volunteer.

³² Benefits regulations have changed and are changing. Get up to date advice from your local volunteer centre or Volunteering England so that you can provide support for volunteers in discussions with their adviser.

Different Types of Volunteering

Many museums still think about volunteering as a regular once or twice a week activity that takes place at the museum throughout the year. This sort of volunteering is invaluable but offering a broader range of opportunities can be of benefit both to volunteers and to the museum. Here are some suggestions to broaden your menu of volunteering options:

Project volunteers

- Undertake a discreet task which can be achieved in a limited timescale
- Appeals to people with a specific interest, or to those who don't feel able to take on a long-term commitment

Occasional volunteers

- Recruited to help with a specific task on a particular day e.g. at an event or activity
- Appeals to people who like to be involved when the place is buzzing or who can only commit to one or two days a year

Off-site volunteers

- Many tasks can be done by people based at home e.g. internet research or indexing or craft work
- Appeals to people who find it difficult to get to the museum or who have time in the evenings but not during the day

Micro-volunteering

- Very short-term activity, sometimes making use of social media and information technology and perhaps only taking thirty minutes or so, from home or on the move. For examples see www.helpfromhome.org or <http://dosomegood.orange.co.uk>

Group volunteers

- People recruited as a group of friends or as a society, often to undertake a particular project, such as looking after a garden or being involved in a performance
- Appeals to people who prefer to volunteer with a group of people they already know

Employer Supported Volunteering (ESV)

- People recruited with the support of their employer who encourages employees to volunteer, either in work time or out of hours, as a way of broadening their experience and adding to their skills
- Your local Volunteer Centre will be able to advise you on the best approach if you are interested in pursuing this option
- The *Volunteering in the Arts Toolkit* has a section on employer supported volunteering.

With all these different groups remember to maintain regular contact and provide all the information that you give to your regular on-site volunteers and any necessary training or guidance on the task. Don't forget the invitations to the Christmas party or the summer outing!

The Accreditation Standard and Volunteers

The Accreditation Standard requires a museum to have an “Appropriate workforce, in numbers and experience, for the museum’s responsibilities and plans”. It is important for museums to be aware that the term ‘workforce’ is used to describe both paid staff and volunteers throughout the Standard and the accompanying Guidance.

Requirement 1.7³³ requires that the museum should have:

- 1.7.1 an appropriate workforce
- 1.7.2 clear agreements for each member of the workforce, setting out their roles and responsibilities
- 1.7.3 formal induction procedures for new recruits to ensure that all members of the workforce have basic information about the museum and understand their role in it

1.7.4 appropriate development opportunities for its workforce

The revised guidance, published in February 2013, makes it clear that the agreements with volunteers should set out the nature of the relationship and the expectations of both sides but are not required to be signed.

The guidance stresses the importance of sound induction and training, including the importance of ensuring that everyone understands key policies such as health and safety and safeguarding. A museum should also have a formal policy which supports the development of all members of the workforce.

³³ http://www.artscouncil.org.uk/media/uploads/pdf/accreditation_standard_english_web.pdf

Child and Vulnerable Adult Protection³⁴

There are two main layers to ensuring that Children and Vulnerable Adults in your museum are safe:

1. Robust policies and procedures covered properly in all inductions and underpinned by common sense.
2. Disclosure and Barring Checks³⁵ (formerly CRB checks) or Protecting Vulnerable Groups Checks in Scotland

On the assumption that your museum is visited regularly by children and/or vulnerable adults, you should ensure that all volunteers (and staff) are made familiar with any relevant museum policies and procedures during inductions. This is not just a matter of box ticking: by having good guidance and doing a clear and thorough induction on child and vulnerable adult protection you can enable your volunteers to be confident and relaxed with your younger or vulnerable visitors whilst respecting the boundaries that will keep visitors safe from harm and them safe from accusation.

For **some** volunteer roles, a DBS/PVG check will be required but be careful, the vast majority of roles in a museum are unlikely to require a DBS check. It is illegal to apply for a check unless the role is eligible for one and you must tell the volunteer why they are being checked.

DBS checks can only be done for volunteers whose role is specified in the Exceptions Order to the Rehabilitation of Offenders Act 1974.³⁶ Many of the roles that previously had CRB checks attached to them will not be eligible for a DBS Check. If you are in any doubt about the eligibility of the role then you can contact the DBS directly to ask them.³⁷

The new 'Update Service' for DBS checks is due to go live in spring 2013. This means that volunteers should not need to face a new check every time they start a new volunteering opportunity. The system will allow an organisation to check online to see whether the volunteer's circumstances have changed since their first check. Your local volunteer centre will be able to give you details of the system.

Please note that this is an area of working with volunteers where the requirements in Scotland are different from those of the rest of the UK. You will need to ensure that you are acting in accordance with the law where you are based.

³⁴ This is an area where you need to be particularly sure of the legalities in the part of the UK where your museum is located. See *Useful Sources of Information* section for web links.

³⁵ Volunteering England has an excellent information sheet on *Disclosure and Barring Service Checks* and Disclosure and Barring Service information can be accessed via www.homeoffice.gov.uk/agencies-public-bodies/dbs

³⁶ There is a very useful Volunteering England sheet on identifying Regulated Activities.

³⁷ Email the DBS (customerservices@dbs.gsi.gov.uk) with 'Eligibility query' in the subject line and give a description of the role and its context. The eligibility of roles is very situation specific, the DBS is very approachable and legality is involved so if in doubt, always check.

Health and Safety

Museums with either fewer than five members of staff or that are entirely volunteer run, are not legally required to draw up a **Health & Safety Policy**, but are strongly advised to do so.

Even if the museum is entirely volunteer run, the museum, and you as individuals, still have an overarching general legal duty of care (not to mention a human responsibility!) to avoid carelessly causing injury to persons.

The notion of duty of care needs to be considered in all aspects of the museum's work and activities, even when loaning equipment to other people, or holding events away from the museum.

- Include volunteers in your Health & Safety Policy
- Make sure you have considered any risks involved in a volunteer's tasks and either discuss the risk assessment with them or, if that seems too heavy handed, at the very least ensure that volunteers understand what they need to do to mitigate any risks.

- Make sure health and safety is covered during every volunteer's induction – in a way that ensures that they understand how to keep themselves and others safe.

See the *Useful Sources of Information* section at the end of this guide for sources of Health and Safety guidance and information.

In our experience, the Health & Safety Executive (HSE) and local authority staff have been helpful, positive and understanding when approached for advice and guidance by small organisations; contrary to myth, they do not see their role as stopping all the fun.

Data Protection and Confidentiality

All museums are likely to hold personal information, such as contact details, for volunteers as well as for staff and other people linked to the museum. This information will be subject to the Data Protection Act, 1998, which has specific requirements, including that the information is:

- fairly and lawfully processed
- for specific purposes only – and not used for any others
- accurate
- only kept for as long as necessary
- secure

Further information and details of the eight principles of data protection are available on the Information Commissioner's Office website (www.ico.gov.uk). The ICO also produces a *Quick Guide to The Employment Practices Code* specifically for small organisations.

It is the duty of both staff and volunteers not to reveal any information which is personal or not intended for general knowledge. Volunteers should be bound by the museum's standards of confidentiality and this should be clearly stated in the volunteer policy, volunteer agreement and volunteer handbook.

It is no good waiting until someone has revealed a bit of confidential information before you tell them it is a problem, so it is a good idea to explain clearly the importance of maintaining data security and confidentiality during volunteer inductions especially as some volunteers may not have had experience of having to keep certain information confidential.

Copyright

Copyright is not an issue that is considered by many museums when they embark on a volunteer project. However, many volunteers are involved in creating original work during the course of their volunteering and they will own the copyright to this work, so that it cannot be changed or reproduced without their permission, unless it has been specifically assigned by them to the museum in writing.

Remember to consider copyright when volunteers are involved in such things as

- photography
- art work
- research and writing for exhibitions, information leaflets etc

The *Volunteering in the Arts Toolkit* has a useful section on copyright and suggests a simple statement of assignation that could be used. You might also find it helpful to look at the guidance provided by the Intellectual Property Office (www.ipo.gov.uk)

Useful Sources of Information

All parts of the UK have sources of support and information for those working with volunteers. Don't hesitate to make use of information on a site from another part of the UK, except where geography matters (like finding a volunteer centre or getting advice that needs to be legally correct for your part of the UK).

Apart from the national organisations, local Volunteer Centres are often excellent both when advertising for volunteers and when seeking advice.

National organisations supporting work with volunteers:

England

Volunteering England merged with NCVO on 1 January 2013 but, initially at least, retains its own brand and web addresses.

- Volunteering England website home page – www.volunteering.org.uk
- Information Sheets – www.volunteering.org.uk/goodpractice/information
- Find a volunteer centre – www.volunteering.org.uk/finder

Some Volunteering England resources are free; some are free to members only. For details of membership, go to the NCVO website (www.ncvo.org.uk)

Northern Ireland

- Volunteer Now supports volunteering across Northern Ireland – www.volunteernow.co.uk
- Volunteer Now has a fantastic range of downloadable resources – www.volunteernow.co.uk/publications including an excellent set of downloadable best practice workbooks on managing volunteers
- Volunteer Centres – some are independent, some part of Volunteer Now:
 - Some Volunteer Centres grouped together to form Volunteer Now
 - Others are independent: Association of Independent Volunteer Centres (www.aivcni.co.uk)

Scotland

- Volunteer Scotland (www.volunteerscotland.org.uk) is the main volunteer recruitment website for Scotland, managed by Volunteer Development Scotland. To advertise volunteer roles or for local support and advice, contact your local Volunteer Centre – see the 'Find a Volunteer Centre' search facility on the front page of the website. If you want to raise the profile of your museum and the volunteer roles on offer, you can also make use of the 'Volunteer Stories', 'Organisation Stories' and/or 'Latest News' sections on Volunteer Scotland. Their section on minimum requirements is useful as a good practice checklist.
- The Volunteer Development Scotland website (www.vds.org.uk) has a great deal of useful, up to date information for people responsible for working with and managing volunteers.
- Museums Galleries Scotland (www.museumsgalleriescotland.org.uk) provides a range of support to museums including a number of useful volunteer related publications.

Wales

- Volunteering Wales website home page – www.volunteering-wales.net
- Information for those managing volunteers from Wales Council for Voluntary Action (WCVA) – www.wcva.org.uk/volunteering, including an excellent range of information sheets on topics relating to working with volunteers.
- Volunteering Wales can direct you to your nearest Volunteer Centre.

Additional Sources of General Advice and Guidance

Voluntary Arts – produces a useful guidance document entitled '*Volunteering in the Arts*'

- www.voluntaryarts.org/resources-and-funding/publications/

British Association of Friends of Museums – offers museum-specific guidance

- BAFM Volunteer Managers and Administrators Handbook, available as hard copy or CD www.bafm.org.uk/publications

Specific Areas of Advice

Volunteer Policy

- Useful information on the Milton Keynes Volunteer Centre's Volunteer Management *Best Practice Section*
- *Get it Right from the Start* has a section on Volunteer Policies. Its focus is particularly about involving a diverse group of volunteers.

Volunteer Role Descriptions

- For detailed guidance, try the Volunteering England Good Practice Bank
- For samples and templates try the web, including <http://www.oursharedresources.com/> but please note that these are shared resources, not necessarily perfect samples

Volunteer Expenses

- 'Voluntary Workers' Expenses' on the HMRC website gives useful guidance (but don't start calling your volunteers 'Voluntary Workers'!) (www.hmrc.gov.uk/charities/guidance-notes)

Health and Safety

- The Health & Safety Executive website (www.hse.gov.uk) offers clear information, specifically aimed at voluntary organisations
- There is a very useful *Risk Toolkit*, produced by the Institute for Volunteering Research and Volunteering England, available for free download from the IVR Evidence Bank.
- Volunteering England offers a free sample *Health and Safety Statement* which you can adapt for your own use, as well as a Risk Assessment Template on their *Health and Safety page*
- Brighton and Hove Volunteer Centre has a useful, clear page on *Health and Safety for Volunteers*

Child and Vulnerable Adult Protection

The processes around Child and Vulnerable Adult protection are changing regularly so it is important to get up-to-date, accurate information, either from your Volunteer Centre or online.

- Volunteering England has a useful, free of charge, information sheet on Disclosure and Barring Checks on the resources section of their website.
- Flow chart on identifying Regulated Activities is obtainable from Volunteering England.

- For queries to DBS about whether roles require a DBS check, email customerservice@db.s.gsi.gov.uk with 'Eligibility query' in the subject line and give a description of the role and its context.
- In Scotland PVG checks are administered by Disclosure Scotland and information about the checks as well as a contact number for advice, is on their website (www.disclosurescotland.co.uk).
- In Northern Ireland www.nidirect.gov.uk has useful information on how the disclosure and barring system works, including links to AccessNI, which manages the checks.

Involving Young Volunteers

- Visit <http://vinspired.com/about/organisations> to see how to sign up to advertise your opportunities

Volunteers Receiving Benefits

- The DWP has a useful leaflet *Volunteering While Getting Benefits* (www.dwp.gov.uk)
- Rules concerning benefits have changed and are likely to change again. Volunteer Centres or national volunteering organisations can give up to date advice concerning volunteers and benefits. Any volunteer on benefits should keep their adviser up to date.

Job Substitution

- A Charter between Volunteering England and the TUC agreeing the difference between paid work and volunteering is available on the TUC website – www.tuc.org.uk

Internships

- Internships Explained – Information Sheet from Volunteering England (www.volunteering.org.uk)

Copyright

- *Volunteering in the Arts* is a toolkit produced by Voluntary Arts (www.voluntaryarts.org) and Volunteering England. It has a section on volunteers and copyright.
- The *Intellectual Property Office* (www.ipo.gov.uk) is also a source of useful information.

continued on next page

Specific Areas of Advice continued

Data Protection

- The Information Commissioner's Office Website (www.ico.gov.uk) has a guide to the Principles of Data Protection and a *Quick Guide to The Employment Practices Code*.

Training

- Museums Galleries Scotland has an excellent resource book on training and developing volunteers, which can be downloaded from their website.
- The Museums, Libraries & Archives Council (MLA) has produced a resources sheet for identifying learning styles – www.inspiringlearningforall.gov.uk
- The Victoria and Albert Museum can provide NVQs for external museum staff and provide external assessment, see <http://vamnvqcentre.co.uk/index.php>. The subjects they cover include customer service, retail and cultural heritage.

- Volunteering England has a free information sheet on *Accreditation of Volunteering* in their Good Practice Bank.
- Information on the development of National Occupational Standards for the Third Sector – <http://www.skills-thirdsector.org.uk/>

Problem Solving

- Volunteering England has an excellent Information Sheet on *Problem Solving for Volunteers*

Volunteer Manager Networks and Training

Whether or not you are a member of staff paid to manage volunteers or a volunteer managing other volunteers, networks are useful for asking questions and getting ideas.

Association of Volunteer Managers (AVM)

- Support for people who manage volunteers, including peer to peer networking – www.volunteermanagers.org.uk

Heritage Volunteer Organisers Scotland (HVOS)

- An informal network open to anyone with an interest in volunteer management in the heritage sector. It offers a forum for discussion and access to useful resources – <http://ivo.org/heritage-volunteer-organisers-scotland>

UK Volunteer Programme Managers (UKVPM)

- A network that you can join, to share skills, knowledge, experiences and information – groups.yahoo.com/group/UKVPMs

Training for Volunteer Managers

- Courses for those managing volunteers are becoming much easier to find, so plug into training via your local volunteer centre. Some courses will be expensive but some will be free or low cost, so shop around.
- Both Lantra (www.lantra-awards.co.uk) and ILM (www.i-l-m.com) run accredited courses on Volunteer Management. If you are struggling to find a course, try asking your Volunteer Centre or contacting your national volunteering organisation.

Useful Books

- *The Good Practice Guide for Everyone who Works with Volunteers* by Kate Bowgett, Kathryn Dickie and Mark Restall, 2002, National Centre for Volunteering, ISBN 1 897708 98 4 [*Currently out of print but really excellent and so it's worth seeing if you can get hold of a copy*]
- *The Complete Volunteer Management Handbook* by Steve McCurley, Rick Lynch and Rob Jackson, 3rd Edition, 2012, Directory of Social Change, ISBN 978 1 906294 60 1
- *The Volunteer Recruitment (and Membership Development) Book* by Susan J Ellis, 3rd edition, 2002, Energize Inc (US) ISBN 0-940576-25-2
- *Recruiting Volunteers* by Fraser Dyer and Ursula Jost, 2002, updated reprint 2010, Directory of Social Change ISBN 978 1 903991 20 6
- *Effective Customer Care for Voluntary and Community Organisations* by Amanda Knight, 1999, Directory of Social Change, ISBN 1900360365
- *Data Protection for Voluntary Organisations* by Paul Ticher, 3rd edition, 2009, Directory of Social Change, ISBN 9781903991923
- *Keeping Volunteers: A guide to retaining good people* by Steve McCurley and Rick Lynch, 2010, Directory of Social Change, ISBN 978 1 903991 90 9
- *Voluntary but not Amateur – A guide to the law for voluntary organisations and community groups* by Ruth Hayes and Jacki Reason, 2009, Directory of Social Change, ISBN 978 1 906294 07 6
- *The British Association of Friends of Museums Volunteer Managers' & Administrators' Handbook*, available from BAFM Administrator, Jayne Selwood, 141a School Road, Brislington, Bristol, BS4 4LZ

For publications from the Directory of Social Change, see the *Human Resources* part of the Publications section of their website – www.dsc.org.uk

For publications from Energize Inc, which is US based, see their website – www.energizeinc.com

Julia Hill was Volunteer and Training Manager at ss *Great Britain* Trust until 2012, when she became Church Urban Fund's Volunteering Operations Coordinator. Julia's previous work included historic house administration and teaching before taking a break from paid work and discovering the delights of volunteering. That experience proved to be more useful than she anticipated at the time! Julia can be contacted on julia.hill_vols@btinternet.com.

Bridget Yates is a retired museum curator with a particular interest in rural museums. She has had extensive experience of small independent museums and is currently a museum volunteer and a trustee. Bridget continues to teach about museums both in the sector and more widely. She can be contacted at bridget.yates@tiscali.co.uk

Disclaimer:

We have made every effort to ensure that the information contained in this Success Guide is correct at the time of publication. The guide is intended as a summary of relevant issues to help you plan or develop your work with volunteers. Legal advice should be sought where appropriate. AIM and the authors are unable to accept liability for any loss, damage or inconvenience arising as a consequence of the use of this information.

The inclusion of other organisations in this Success Guide does not imply any endorsement of independent bodies; all sources of further information are listed solely for signposting purposes.

AIM Association of Independent Museums

3 Chestnut Grove, Ludlow, Shropshire SY8 1TJ

Registered in England No. 1350939 | Charity No. 1082215

Copyright © 2013 Julia Hill and Bridget Yates and Association of Independent Museums
AIM Editor – Diana Zeuner



Supported using public funding by

**ARTS COUNCIL
ENGLAND**

aim-museums.co.uk