Sharing the learning from the Wide Skies Project

A resource for small and medium sized museums on the basics of volunteer management

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1 About the Wide Skies Project and this resource

Wide Skies was a three year project, commencing April 2011, concerned with recruiting and training volunteers in nine Cambridgeshire museums to work with their collections to develop learning activities within their communities. The project application was made by Cambridgeshire Museums Advisory Partnership (CMAP). It was funded by the Heritage Lottery Fund (HLF) and Renaissance East of England, and hosted centrally by Cambridgeshire County Council.

The museums were split into two clusters; the Fenland cluster museums were Wisbech & Fenland Museum, Chatteris Museum, March Museum, Whittlesey Museum and Octavia Hill's Birthplace House. The Huntingdonshire cluster museums were St Neots Museum, The Norris Museum (St Ives), The Cromwell Museum (Huntingdon), and Ramsey Rural Museum. They are referred to in this resource as the 'Wide Skies museums'.

Some of the benefits the project has realised include:
- A larger number of volunteers have been recruited and retained;
- There is likely to be greater sustainability of services at some museums because they have a larger volunteer workforce;
- At certain museums, there is now wider range of volunteers (of different ages and backgrounds);
- Some museums are now more welcoming of new volunteers and younger audiences.

Along the way, the museums have also learnt many things about volunteer recruitment.   This document is not intended to replace other information sources/toolkits that are already available and which are more comprehensive than this resource (see Section 5). However, it seeks to draw together the lessons learnt by Wide Skies museums to share with other similar small and medium sized museums and to place this in the wider context of published best practice on managing volunteers in the museum sector.

The advice has been grouped according to three areas:
- Having ready the necessary policies, plans and supporting documents before you welcome volunteers
- Recruiting volunteers
- Managing and retaining volunteers

Each of these areas is covered within its own section. Each section starts with advice given by Wide Skies museum staff. Where there are additional resources publically available to support the advice being given, these are referenced accordingly.
With the exception of Appendix 4, the additional appended documents were all developed by the Wide Skies Learning Coordinator Team.

2 Are you ready for volunteers?

> *Be very clear about the volunteer base you are looking for.*

> *Don't underestimate the time it will take, and have in place the infrastructure, for example the volunteer handbook, recruitment and induction plans.*

> *Know what you are taking on. Put yourself in the position as people do when they ask themselves, what would I do with £1 million, what would my spend plan or master plan be? Consequently, if you had 10 volunteers come along, what jobs would you want done?*

Having in place the necessary policies and information before you recruit volunteers includes the following:

- A volunteer policy (see below)
- A plan that considers the areas in which your organisation would most benefit from having additional voluntary staff (this could draw on your forward plan)
- Volunteer role descriptions (see below)
- A volunteer handbook (see **Appendix 1**)
- An agreed method to field and respond to volunteer enquiries (see section A of **Appendix 2**)
- An agreed person / people who will coordinate and manage volunteers

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More about ...

Your Volunteer Policy
This does not need to be a lengthy document but it should set out the following:

- The museum's mission and vision
- The purpose of the policy
- A definition of 'volunteering'
- The types or 'roles' of different volunteering opportunities
- Recruitment, Application and Screening Process
- Volunteer role descriptions
- Supporting volunteers (induction, supervision, training)
- Trial period (if applicable)
- Expenses
- Health and Safety
- Equal opportunities
- Insurance
- DBS checks, protection and safeguarding*
- Data Protection - Confidentiality
- Complaints/grievances

* All museums working with children and other potentially vulnerable audiences should have in place a policy that covers 'safeguarding'. For help in this area please refer to the Home Office code of practice 'Safe from Harm' available at:
http://www.sa-cni.org.uk/uploads/4/9/5/4/4954631/safefromharm.pdf

Many examples of museum volunteer policies can also be found online if you search using the appropriate key words.

Accreditation guidance published by Arts Council England in 2013 states that 'all volunteers must have clear agreements with the museum they are volunteering for, setting out the nature of the relationship between them and the museum and what the volunteer can expect from the museum, and vice versa' (search online at http://www.artscouncil.org.uk).

More about ...

Volunteer role descriptions should set out for the role:
- Its purpose and responsibilities
- The desirable skills or experience the position requires
- The level of commitment expected
- Any training that will be provided by the museum
- Any practical information (e.g. travel and expenses)

Examples are also provided in **Appendix 1** (Volunteer Handbook).

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3 Recruiting volunteers

> *Another critical thing about volunteers is matching the skills or experience they offer to the available jobs and the museum's priorities.*

> *Get younger and older volunteers working together as soon as possible so that they find they have something in common early on.*

Some of the Wide Skies museums wanted to broaden their volunteer base, so that it included younger people and people from a wider range of backgrounds. It was hoped that this would help bring new perspectives into the museums concerned and, in one museum, change some traditionally negative perceptions about younger audiences. This was in fact achieved.

Wide Skies museums successfully recruited volunteers in various ways:
- Word of mouth (i.e. via existing volunteers)
- Advertising through the local paper (with a wide readership)
- Setting up banners about volunteering outside the museum
- Having a leaflet about volunteering opportunities available at museums' receptions / events
- Holding volunteer open days
- Talking with regular visitors to find out if they would be interested in volunteering
- Using their local volunteer centre (www.volunteeringcambsandpboro.org.uk), including attending volunteer days hosted by centres
- Websites (www.do-it.org.uk and shapeyourplace.org)
- Publicising volunteering opportunities via the Richmond Fellowship (an organisation which supports people with mental health issues)
- Advertising in hospitals, doctor's surgeries, village halls, local libraries, supermarkets, banks, shopping centres
- Working with Community Service Volunteers (CSV) which can find volunteers and create volunteer opportunities

Other routes suggested by Wide Skies museums include:
- Raising awareness via social media sites
- Advertising opportunities via taster days / behind the scenes tours
- Business links
- University outreach
- Colleges, schools, playgroups
- Publicising volunteering opportunities via organisations or groups such as The Prince's Trust, U3A, A4E, Richmond Fellowship (supports people with mental health issues), Gingerbread Charity (for single parents)
- Linking to annual national events, e.g. Volunteers Week (1st-7th June), Make a Difference Day (October), International Volunteer Day (5th December)

Some museums advocate not being afraid of turning away new volunteers if (i) you currently do not have the resources in place to support them, (ii) you have no current vacancies that match their skills / expertise. This idea may be contentious with some

museums but it is how other museums operate, for example St Edmundsbury Heritage Service (a copy of the letter they use for this purpose can be downloaded from the SHARE website – see section 5 of this document for the website address).

The induction process should include the following:
- A tour of the museum
- The volunteer completing a registration form (**Appendix 3**)
- An introductory talk (setting out the museum's expectations)
- A personal one-to-one welcome and introduction which would cover:
  - Communicating who is to be the volunteer's point of contact in the museum
  - Going through the role description and volunteer development record to establish the expectations of both the volunteer and the museum

4 Managing and retaining volunteers

Don't be afraid of managing volunteers as you would paid staff.

Have in place a volunteer manager [even if this is an informal role] who can keep in touch with volunteers, organise the front of house slots in the timetable and be involved in the interviewing and mentoring process.

There should be in place a continuous assessment process not to just monitor performance and development but as an opportunity for both sides to discuss whether the volunteer is best suited to the work.

I realise [now[how important it is to take the time to communicate to people that you value their worth, so that they don't feel isolated. If you have volunteers working on front-of-house, this makes communication that much easier, because you can have a quick chat as you go past and tell them things like how interesting the phone call was that they just put through. This make them feel part of the organisation and that it's not hierarchical.

Managing volunteers is not always a simple or straightforward process. It can involve a lot of work on the part of a museum and should not be underestimated. However, welcoming new volunteers into your museum can have huge benefits.

Clearly, the relationship between an organisation and its paid staff will be different to that between an organisation and its volunteers - volunteers can have less of a stake in their position which means they will more readily leave if they are unhappy – however, this point is about taking the time to make an 'informal contract' or agreement with volunteers about how the museum will support their development so that both parties are clear about each other's expectations. This type of resource is included in **Appendix 4**.

Some museums also ask volunteers to sign an agreement which sets out clearly the code of conduct for both the museum and the volunteer (Swaffham Museum for example – a copy of this agreement can be downloaded from the SHARE website, see Section 5 of this document for the website address). In rare circumstances where a volunteer's behaviour may be causing harm to others in the museum or to the reputation of the organisation, being able to refer to how the code of conduct has been broken can provide the museum with the necessary evidence for terminating the relationship with the volunteer. Other advice for managing challenging behaviour by volunteers is given overleaf.

It is vital to ensure that volunteers feel involved and valued if you are going to retain them longer term. Things that some of the Wide Skies museums were trying and which you could do regularly to achieve this include:

- A volunteer forum – a regular morning/afternoon slot once a month at which all volunteers are welcome to visit the museum, socialise and enjoy complimentary tea/coffee and biscuits. This will enable people who volunteer on different days to meet one another and feel less isolated. If they are aware of the wider context to their volunteering role, this is likely to make them feel more motivated.

- Effectively communicating to volunteers that you appreciate their input. It can be as a simple as a few words of thanks, or a regular e-mail / printed newsletter about the things volunteers have helped to deliver or even an annual event which celebrates their contribution.
- Regularly reviewing and updating the volunteer development record to assess how well you are supporting a volunteer in their work, if the volunteer is happy in their current role, if there is additional support that should be provided or if the volunteer's time with the museum has come to a natural end.

Of course, not all volunteers will be retained – indeed some may have started out with the intention of volunteering for a short or discrete period of time – and this too can be a positive thing. Having new people joining your museum will mean a fresh perspective. Nevertheless, it can be helpful to understand why some volunteers leave (if you do not already know the reason) so that you can make improvements where necessary that may help to retain more volunteers in future. This is where an 'exit interview' or 'exit survey' can come in handy. The sorts of things you could ask your volunteer to record could include their role(s) / position(s) held, length of time with the museum, reason for leaving, comments on the aspects of volunteering that they most enjoyed and suggestions on how to improve the volunteering experience

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More about... Managing challenging behaviour by volunteers

How do you know there's a problem? How many of the following would you tick?
- Lacks eye contact
- Regularly moans
- Upsets other volunteers / staff
- Not doing what is needed
- Unrealiable – does not turn up
- Picky - only does what (s)he wants to do
- Compromises health and safety of themselves / others
- Shows museum in bad light
- Quality and ability to fulfil role is an issue

Suggested steps to take
- Talk about the role profile - if it is a new/revised one explain that everyone in this role needs to meet these expectations.
- Offer training and ask volunteers to agree to this.
- Offer one-to-one review (to all volunteers so that everyone is being treated equally).
- Offer additional support needed to fulfil the role.
- Solicit comments from visitors (if volunteer is in a public-facing role).
- Talk about changes to the role – explain museum's expectations for the future- will (s)he have a problem with this? This may be a difficult conversation to have but is necessary.
- Offer other roles in museum and also suggest opportunities and support available through the volunteer bureau.

If you have tried all these suggested steps and there is still a problem, then the museum has been fair and equitable and it would not be unreasonable for the museum to politely ask the volunteer to leave.

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5 Useful links to other resources

The **Museums Association** provides advice and case studies on volunteering to its members via **Museum Practice**. For resources specifically about volunteers go to: http://www.museumsassociation.org/museum-practice/volunteers

Renaissance East of England sponsored a Volunteer Development Programme in 2011-12 through which many resources were shared by participating museums. These include examples of volunteer application forms, role profiles, volunteer policies and information leaflets about volunteering. More than a dozen files are available for free download from the **SHARE website** at: http://sharemuseumseast.org.uk/resources/leadership-governance-resources/.

Volunteer England has a 'Good Practice Bank' which is an excellent source of information and advice, both for people who would like to volunteer and for those who may manage volunteers. It is available at: http://www.volunteering.org.uk/goodpractice
Some information sheets on good practice are only available to its members.

'Volunteering in the Arts, a toolkit created by Voluntary Arts and Volunteering England' is a comprehensive and current (2012) resource that covers a range of topics (recruitment & retention, equality & diversity, induction & training, support & supervision, expenses, health & safety, insurance, monitoring & evaluating a volunteer programme, job substitution, volunteers & copyright, and employer supported volunteering). It is available for free at: http://www.voluntaryarts.org/2012/09/11/volunteering-in-the-arts-toolkit/