

Volunteer recruitment and management toolkit

There are many hundreds of volunteers supporting museums in a number of ways across the country. Some museums are entirely volunteer run whereas others are relatively new to the use of volunteers. For many the picture is slightly muddled as the volunteer team has grown on an ad hoc basis and the management, and purpose, of the volunteer team can be unclear. In many cases the museum may be overseen by a board of trustees who will all be volunteers.

Whatever stage your museum is at it is worthwhile having a regular review of how your museum is using volunteers, whether you have the correct mix of skills within your volunteer team and whether the volunteer experience could be improved.

Volunteer Policy

Having a clear and concise volunteer policy will help to keep everyone focused on why your museum is welcoming volunteers and what all parties should gain from this. It can also help to reassure paid staff that having a volunteer team will support, and not supplant, them. The policy needn't be complicated but simply sets out a little information about your organisation, why you plan to welcome volunteers, what roles they will fulfil, what you expect from them and how you will support them. An example template can be found in [appendix 1](#).

Doing a skills audit

Asking your volunteer team to regularly review their skills and competencies can really help with building an effective volunteering team. It will flag up skills gaps which you may then choose to fill by targeted recruitment or by training your existing team. This is particularly important if your museum is overseen by a board of trustees as, for effective governance; you need to ensure that your board has an appropriate mix of skills.

Stage one of any audit is to decide what skills and experience you need for the effective running of your museum. Link this to your plans for the next 3-5 years; for example will you be fundraising, expanding part of your service or planning particular exhibitions? You could use a simple table for this ([appendix 2](#)) which will give you a list of skills and experience you are looking for to help support the museum over the next few years and this can form the basis for your skills audit.

Skills audit for board members

Board members need a particular set of skills and it is often more effective to audit these separately from the rest of the volunteer team. You are likely to need people with management and financial skills, fundraising experience, HR experience and more specialist skills linked to your museum. Two examples of a skills audit for board members can be found in [appendix 3](#).

Skills audit for other, existing volunteers

If you haven't reviewed the skills and experience of your volunteer team before it is a good idea to start with a questionnaire that asks more open questions rather than a tick box. Some people find the idea of a skills audit daunting and you may be met with comments such as 'well I haven't got any skills'. Asking a set of questions designed to understand why someone is volunteering, what they get out of it as well as what they bring will be less worrying for many people. If you have staff capacity then having short face to face meetings with volunteers to chat through the audit will help to understand their skills in more detail

Alternatively you may decide to use a tick box style audit as it will be faster for people to complete and will be much easier for you to compile the results. This will be particularly useful if you have a large volunteer team. Two examples of different types of audits can be



found in [appendix 4](#)

If you have recruited volunteers for a specific volunteering role you will already have a good idea of their skills in relation to that role. It is always worth asking new volunteers to fill out a brief skills audit as they may have other experience that you are unaware of which could prove to be invaluable. However, do be aware that just because, for example, someone has worked as an accountant doesn't mean that they will be happy to provide that service to you - they may be volunteering for new experiences and for a break from the 'day job'.

Volunteer recruitment

Deciding what your museum needs

Having decided what your current volunteer team can provide and linking this to your museum plan you are now in a position to clarify whether you need to recruit more volunteers. If you don't currently have a volunteer team but have decided to introduce volunteering at your museum you should also carefully consider exactly what gaps you are hoping that volunteers will fill. In both cases it is a good idea to review why you want to welcome volunteers to your museums, what your museum hopes to gain from this and what you hope volunteers will gain.

Volunteering England has some useful advice about avoiding job substitution <http://www.volunteering.org.uk/component/gpb/jobsubstitution>. Fundamentally, volunteers should be used to add value to what your museum offers and not to replace or undercut salaried staff.

People volunteer for a huge number of different reasons: some want to meet people and see volunteering as a social activity. Older people may want to continue to make a contribution after they have retired. Some volunteers may want to gain specific experience to help them build a career and others may have a long term interest in a subject relevant to your museum.

Things to consider when building a volunteer team or recruiting new volunteers to strengthen an existing team are:

- Who will be the overall volunteer manager?
- Who will manage individual volunteers and do they need training to support them in this?
- Are you offering long term, regular volunteering opportunities or short term opportunities linked to a specific exhibition or project?

It is good practise to write role descriptions for each volunteering opportunity and make clear what your expectations of time commitments are as part of this. Having clear role descriptions will help with recruitment and put the volunteering relationship on a sound footing from the start. If paid staff have concerns about volunteers replacing them a clear role description can help to allay these fears.

See [Appendix 5](#) for a role description template

Recruiting volunteers

A good starting point for recruitment is an informal drop in event where potential volunteers can meet any existing volunteers or have the chance to meet staff and talk about what would be involved. This step can save a lot of time in the long run as the more that potential volunteers understand about the commitment they are potentially making the better levels of recruitment and retention will be. A chat over coffee and cake can be a great ice breaker and encourage people to find out more. Have role descriptions available and be clear about the next steps if people are interested.

If you want to engage all members of your local community as volunteers then consider



where you are going to publicise your recruitment. Limiting publicity to your website may give you a very small pool and it is worth considering producing a number of posters and flyers. These can be placed in libraries, doctor's surgeries, schools, local shops, anywhere people will visit regularly.

Provide a simple registration form asking why people are interested in a role and what skills and experience they have. It is a good idea to ask for the name of two referees and to follow these up. Potential volunteers can then be invited for a face to face chat where you can find out more about them and they have the chance to ask further questions. As this isn't a paid job this won't be a formal interview but you can have a structured conversation where you ask specific questions about motivation, skills and experience and provide plenty of opportunities for the potential volunteer to ask you questions and find out whether the volunteer opportunity is right for them. See [appendix 6](#) for an example registration form.

At this stage if you are happy that the individual meets your criteria and they are happy to offer their time as a volunteer then you can take up references and consider any other checks you may need to do (see section below).

It is important to have a plan at this stage for how you will decline someone's offer of help. If someone has no relevant experience and you don't have the time or capacity to train them it is unfair to accept them as a volunteer for that role. In this case you may want to have a list of opportunities available elsewhere or organisations that can help them to find a more suitable volunteering opportunity. Ask if you can keep their contact information in case a more suitable role comes up in future. It may be that you only have the capacity to manage a set number of volunteers and have had more interest than expected and in this case you may want to ask if someone is prepared to go onto a 'reserve' list. Be clear with someone about their positive attributes but also why at this point you don't feel that they are right for the role. For example:

'I really enjoyed meeting you and your enthusiasm for the museum was clear to see but at the moment we really need volunteers who have had experience of X or Y. I'd love to get in touch if a more appropriate role comes up'.

Volunteer agreement

It's a good idea to set out in simple terms what your responsibilities are towards the volunteer and what you expect of them in return. Volunteering England give some good advice and some sample agreements here

<http://www.volunteering.org.uk/component/gpb/volunteeragreements>

Typically an agreement will contain a brief description of the role and what the intention is behind it, a list of what the museum will provide (training, support, reimbursement of expenses, specialist equipment, access to specialist clothing, insurance etc.) and a list of what you would like the volunteer to provide (hours agreed, agreement to follow organisational policies with regard to health and safety, equal opportunities, client confidentiality, child protection)

Understanding your responsibilities as a volunteer manager

Managing volunteers can be rewarding and maintaining a positive relationship between volunteer and paid staff creates a great atmosphere. There are some fundamental differences between managing the two groups.

What are the differences between employees and volunteers?

At first glance this is obvious- employees have a contract of employment and are paid while volunteers are unpaid and don't have a contract. While you can reimburse volunteers for expenses you do need to be careful only to reimburse actual expenses rather than give a flat



rate. As volunteers don't have a contract they also don't have a notice period so you may find volunteers leaving at very short, or no notice.

Health and safety

Health and safety legislation generally only applies to employers and employees however, the HSE says

*'The HSW Act sets out the general duties that employers have towards employees. It also requires employers and the self-employed to protect people other than those at work (eg members of the public, **volunteers**, clients and customers) from risks to their health and safety arising out of, or in connection with, their work activities.'*

The Health and Safety at Work Act also says

"to ensure, as far as reasonably practical, that persons not in their employment, who may be affected by their undertaking, are not exposed to risks to their health and safety"

It is good practise to include volunteers in your organisation's health and safety policy and to prepare Risk Assessments for activities they will undertake.

Safeguarding

If you are going to invite young people and children to volunteer with you then there are few things to consider. You should undertake a Risk Assessment to decide whether placing a young person in a volunteering role would create any risks for them or other people. It is a good idea to ensure that parents or carers are happy with the role and tasks and the time commitment and that they consent to this.

Before taking on a young person as a volunteer you should understand the level of supervision needed. Young people shouldn't be left un-attended, will need constant supervision if they are undertaking any potentially dangerous activity and should be supervised by more than one adult.

If you are involving your volunteers in delivering activities for children this should be reflected in your Child Protection Policy. It is unlikely that you will be able to ask for a check from the Disclosure and Barring Service as your volunteers will not be taking part in frequent and unsupervised work with the same group of children (frequent in this case means Teaching, training or instruction of children, carried out by the same person frequently (once a week or more often), or on 4 or more days in a 30-day period, or overnight.

<https://www.gov.uk/government/organisations/disclosure-and-barring-service>

In order to protect both your volunteers and the children they will be working with it is best to design any activities so that parents and carers at family events, or staff from schools on school trips are always present and no volunteer is ever left alone with a group of children.

The Young Archaeologists Club has a good Code of Conduct for working with children

<http://www.yac-uk.org/sites/www.yac-uk.org/files/node-files/1.Code-of-Conduct.pdf>

Training and development

A good volunteer induction will get the volunteering relationship off to a positive start. Ensure that volunteers understand where they fit into the overall vision of your organisation and how their role will contribute to this. You can cover a range of practical information too and ensure that all volunteers have a good basic understanding of your Museum.

Specific role based training can be delivered in a variety of ways from shadowing existing volunteers to bringing in specialists to deliver training in, for example, delivering engaging guided tours.



Reward and retention

Paid staff may gain all sorts of rewards and satisfaction from their work but the main way in which their contribution is recognised is via a regular wage. As volunteers don't see this regular recognition you will need to consider how you can recognise and celebrate their contribution on a regular basis.

Celebration events can be a useful way of getting the volunteer team together with paid staff and publicly thanking everyone for their contribution to the success of your museum. These don't have to be expensive and a picnic or barbecue can be a relaxed event giving people the chance to get to know each other.

There is a national volunteering week each year and you could link a Thank You to this <http://volunteersweek.org/>

You may also want to consider nominating volunteers for external awards, for example the Marsh Trust Awards for volunteering in Museum Learning http://www.britishmuseum.org/about_us/volunteers/marsh_awards.aspx

If you use social media then mention volunteers regularly on Twitter, Facebook or in blogs. You could have a space on a noticeboard near the entrance to your museum where you regularly post news about what the volunteer team has contributed. This could be a place to pick out individual achievements or you could regularly publicise 'This week/month our volunteers gave x hours of their time to help visitors enjoy the museum'.

Be wary of 'perks' which may cloud the difference between paid staff and volunteers. Only actual expenses can be reimbursed and 'Thank You' gestures which give financial advantages such as gift tokens, may create problems for both you and the volunteer. However, if paid staff get, for example a discount in shops or cafes then you can give volunteers the same.

Ending the volunteering relationship

What happens if it goes wrong?

Hopefully if you have been clear about expectations on both sides the volunteering experience will be a positive one on both sides, however, sometimes things don't work out and you may need to consider changing, or sometimes, ending the volunteering relationship.

If a volunteer has behaved in a dangerous or inappropriate manner this is as unacceptable as if a paid member of staff behaves in that way. However, this is rare and what occasionally happens is that a volunteer becomes dissatisfied or uncomfortable in their role maybe because

- there have been changes at your organisation
- the volunteer team has changed
- they are no longer being stretched in the role
- personal circumstances have changed

In many of these cases a confidential chat may be all that is needed to agree changes to the role that would enable the volunteer to feel happier and to continue volunteering for you. Occasionally there may need to be a change in behaviour toward the volunteer by staff members who may not have realised their impact on the person and this could be achieved by training or coaching of paid staff. However, if there is a persistent issue the whole volunteer team can be disrupted and if a resolution can't be found then you will need to consider asking the volunteer to leave.



What happens when things go right?

Volunteers will leave for a range of positive reasons. In some cases they will have come on board for a specific project and will move on when that has finished. Older volunteers may decide to 'retire' and younger volunteers may move into education or paid work. Make sure that you thank your volunteers when they leave by writing to them and perhaps making a short speech on their last day. It may be appropriate to document the achievements of a volunteer so that they can show this information to prospective employers. It is quick and easy to design a certificate with your Museum Logo which records the time a volunteer has spent at your museum.

A brief 'exit interview' will enable you to capture the experience of a volunteer and asking them what their highlights were and what, if anything they would change about the volunteering experience enables you gather information to help you to offer a positive and fruitful experience for your volunteer team in the future.

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