



# Willing&Able

recruiting, managing and retaining volunteers in museums and galleries

**Authors: Nina Bowbridge and Mark Creyton**



# acknowledgements

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Recruiting, managing and retaining volunteers in museums and galleries

First published 2002 by the MAQ / RGAQ Partnership Program

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## Publication Sponsor

This project is financially assisted by the Queensland Government through the Queensland Community Assistance Program of International Year of the Volunteer.

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**Printing** SNAP Printing Fortitude Valley

A publication of the Joint Training and Professional Development Program of Museums Australia (Queensland) and the Regional Galleries Association of Queensland.

Produced in partnership with Volunteering Queensland.

This publication is produced in association with a series of workshops, delivered across Queensland during April – May 2002. Financial assistance toward the development and delivery of the workshop series was provided by Gambling Community Benefit Fund and Queensland Heritage Trails Network.

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## ISBN 0 958 6416 2 5

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## Acknowledgements

The following people have contributed to this project and their valuable assistance is gratefully acknowledged;

Lyndsay Bedogni, Ray Bourne, Deb Cavanagh, Kath Corcoran, Anne Fraser, Maria Friend, Marie Giess, Robert Heather, Tracey Heathwood, Stephen Hobson, Ingrid Hoffman, Ian Jempson, Cheryl Jorgenson, Gaill Macciocca, Gregor McCaskie, Stephen McGarrigle, Fiona Mohr, Denise Neville, Karen Nielson, Dr Dan Robinson, Rene van Raders, Caroline Randle, Helen Satori, Maryke Stagg and Debra Tranter.





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# introduction

Central to the development of museums throughout Queensland has been a massive voluntary effort. The collection and maintenance of our collective history has developed through many outstanding individual and community efforts.

Today, the role of volunteers in museums is even more critical. A recent study by Arts Queensland<sup>1</sup> suggests that volunteers contribute over 75,000 hours per week to arts and cultural organisations throughout Queensland. The roles of volunteers in museums can include: acting as guides, maintaining and developing collections, working on management committees, promoting community involvement and providing administrative and managerial functions.

Although the study by Arts Queensland illustrates the astonishing level of commitment and involvement volunteers provide to museums, many museums still struggle to attract interest from community members and maintain the level of involvement they need to effectively operate. Other important trends affecting the future of many museums are: the changes in the community's perception of volunteering, the decreasing pool of 'traditional' volunteers and the changing nature of work. However, many museums recognise that the world of volunteering is changing and that they need to adjust or alter their practices to effectively engage community members and to ensure a vibrant and sustainable museum in years to come.

This handbook has been designed to provide both volunteers and volunteer leaders in museums with a broader understanding of why a new approach to volunteer management is vital to the viability of their museum. The handbook also aims to provide volunteers and volunteer leaders with the tools to find new and innovative ways of engaging, managing and maintaining volunteers.

## Project Background

It is estimated that regional museums and galleries in Queensland are currently supported by the work of approximately 7000 volunteers. Effective volunteer management is now recognised as a critical issue for museums and galleries. In recognising that the contribution of museums to Queensland's cultural life and identity is substantial Museums Australia (Qld) [MAQ] in partnership with Regional Galleries Association of Queensland [RGAQ], through the Training and Professional Development Program MAQ/RGAQ Partnership Program, developed the *Willing & Able: recruitment, managing and retaining volunteers in museums and galleries* workshop series.

Expertise from Volunteering Queensland was also sought to ensure that the content, structure and delivery of both the workshop series and the handbook were consistent with best practice. The workshop leaders from Volunteering Queensland included Nina Bowbridge, Kath Corcoran and Mark Creyton.

Launched in Toowoomba on 2nd March 2002, the two-day workshop series aimed to encourage paid and unpaid coordinators of volunteers, and managers or committee members intending to recruit and coordinate volunteers to:

- Develop local strategies for greater community involvement in volunteering;
- Develop leadership skills necessary to attract, manage and recruit volunteers; and
- Develop skills in drafting plans for community involvement.

The workshop series was then delivered in Beaudesert, Nambour, Townsville, Cairns, Rockhampton, Mackay, Longreach and Brisbane.

<sup>1</sup> Volunteers in the Queensland Arts and Cultural Sector, Author: Rebecca Scollen, Report to Arts Queensland, December 2000, Brisbane



## introduction (cont'd)

The need for information and resources on effective volunteer management across the museum and gallery sector became more apparent as interest in the workshops outstripped available placements. In total over 140 participants attended the workshops across Queensland.

### **Who is this handbook for?**

This handbook will be useful for anyone involved in volunteering, including:

- museum or gallery volunteers
- managers or coordinators of volunteer programs in museums
- the managers or coordinators of one-off, short-term or long-term projects requiring volunteers

Whether you have an existing volunteer program or you are considering establishing one, the handbook will be a useful starting point for developing and reviewing your volunteer program.

### **How to use this handbook**

This handbook aims to provide some useful approaches and tips for those involved in establishing and maintaining volunteer groups and programs.

The chapters have been ordered to enable a logical progression through the relevant concepts, theories and examples of effective volunteer management. Although it is recommended that you progress through the handbook sequentially, as linkages exist between the chapters, progressing through the chapters selectively is also possible.

The models included at the beginning of each chapter indicate the structure of each chapter and illustrate the way you will progress through the content of each section.

The exercises included in the handbook may also assist you and your management/ coordination team or group in clarifying ideas and planning processes. As the exercises have been designed to provoke thought and contemplation it is recommended that you complete them within a group setting. This recommendation also acknowledges that shared responsibility for volunteer management should also include shared learning, shared agreement and shared awareness.

### **Use of the term 'museum/s'**

The use of the term 'museum/s' throughout this handbook is inclusive of galleries and Keeping Places. The term also refers to the Museums Australia definition of museum, as identified in article 5.3 MA Constitution amended 22 March 2002, as an institution with the following characteristics: A museum helps people understand the world by using objects and ideas to interpret the past and present and explore the future. A museum preserves and researches collections and makes objects and information accessible in actual or virtual environments. Museums are established in the public interest as permanent, not-for-profit organisations that contribute long-term value to communities. Museums Australia recognises that museums of science, history and art may be designated by many other names (including gallery, and Keeping Place).



## How this handbook is organised

The handbook is divided into five (5) chapters. Each chapter focuses on a key component of volunteer program management and examines strategies to facilitate healthy and effective community involvement.

### Chapter 1: Are You Prepared?

Considers the issues behind the scenes — the issues that impact on the success (or otherwise) of community involvement in your museum. It provides useful insights concerning volunteer involvement that will be the basis for decision-making about the more practical elements of the volunteer program.

Specifically it looks at:

- definitions and interpretations of volunteering
- changing trends and attitudes within government and community that are affecting volunteering
- the internal environment of your organisation and attitudes fundamental to effective and healthy volunteer programs
- a checklist to examine the relevance and appropriateness of volunteer involvement in your museum

### Chapter 2: Getting Organised

Focuses on preparing for community involvement. Whether you are just starting, or have an established volunteer program, it will be useful to review how formal planning and organising can contribute to achieving effective involvement. A key theme is documenting the planning processes that contribute most to direction setting, boundary setting and regulation within your organisation.

Specifically it looks at:

- developing a clear and agreed rationale for volunteer involvement
- key elements of planning
- risk management for volunteer involvement
- policies for volunteer programs

### Chapter 3: Who Wants to Be a Volunteer?

Examines approaches to engaging and connecting with your community. It looks at identifying those people who are most likely to be interested in volunteering. It also outlines some key communication strategies that contribute to creating a sustainable and healthy community connection.

Specifically this includes:

- identifying and exploring relationships with stakeholders
- developing effective approaches and communication
- conversations for meaningful involvement
- making the transition from interested to involved



## introduction (cont'd)

### **Chapter 4: Making It Work**

Focuses on the practical aspects of a volunteer program. It defines the importance of leadership. It also looks at how to meet the needs of the group and individual volunteers.

It deals with issues such as:

- allocation and delegation of work to volunteers
- supporting volunteers in appropriate and sustainable ways
- developing ability and potential in volunteers
- involving volunteers in meaningful ways
- demonstrating the collective and individual value of volunteers
- linking volunteers to the whole organisation
- leadership for volunteer programs

### **Chapter 5: Reflect & Adapt**

The final chapter provides an overview of the previous chapters. It focuses on reflection, interpretation and change. This creates a complete circuit. The information gained from review and reflection can assist in further developing and improving your volunteer plan and daily practices.

We trust that the information and suggestions provided here will be useful and wish you all the best in your community involvement initiatives.

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EXECUTIVE OFFICER **MUSEUMS AUSTRALIA (QLD)**

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## about the authors

### **Nina Bowbridge**

In her role as educator and facilitator at Volunteering Queensland, Nina Bowbridge has consulted and worked with hundreds of voluntary and non-profit organisations and groups to develop more effective volunteer programs and community involvement. Prior to being involved in Volunteering Queensland, Nina participated in a diverse range of community settings including: youth programs, leadership programs, community radio and environment organisations. She facilitates a range of projects and learning experiences that contribute to positive, meaningful community participation and action. She has also developed new programs in communication, team building and strategic planning.

Nina believes that volunteering is a means of self-expression and a way to create social momentum. Nina says “We need to create a meaningful identity for volunteering and ensure positive volunteering experiences for all.”

### **Mark Creyton**

Mark Creyton is Education Manager of Volunteering Queensland. He has over fifteen years experience as an educator and consultant working with a range of voluntary and non-profit organisations and groups.

Mark specialises in the areas of non-profit and community leadership, community participation and personal and organisational wellness. He facilitates a range of projects and workshops to develop more effective leadership within communities and on boards, to assist organisations and groups work with volunteers and to support staff within non-profit organisations to work at staying well.

Mark believes that volunteering can provide an opportunity for anyone to make a difference in the world, to put their values into action and engage in community. “Volunteering should provide a space and place for everyone who chooses to be involved” Mark says. “If the world of volunteering is to achieve these aims, we will need to focus on meaningful work, developing community leaders, inclusive practices and a human-centred rather than human resource approach to working with volunteers.”



## CHAPTER ONE



ARE YOU PREPARED?





## Model for building volunteer programs



This model illustrates how each of the elements of building a volunteer program fit together and influence each other. A key part of this model is that all elements are placed within the context of understanding community involvement.



1.2

## Concepts of community involvement

The *Willing & Able* handbook aims to provide a fresh approach to recruiting, managing and retaining volunteers. Central to this approach is the idea of connecting and engaging the community in your museum.

Some traditional models and approaches to volunteer management have been narrow and rigid, with a key focus on attracting and retaining volunteers. Often volunteer management systems are introduced without due consideration of the culture and needs of the museum or the skills and interests of community members.

The *Willing & Able* approach is two-fold. It focuses on: (1) the role of volunteers in sustaining and developing the museum, and (2) building and supporting the community as a whole. It considers volunteering in museums as one way in which volunteers can engage with the community and make a difference to the place where they live. *Willing & Able* is a model developed to accommodate the changing nature of communities and the needs of people. This approach recognises the needs of the museum, the opportunities the museums can provide for volunteers, the needs and motivation of volunteers, and the capacity of the community at large.

There are several key concepts that underpin the *Willing & Able* approach:

**Whole of community approach.** In identifying and engaging volunteers the focus is placed on the whole community rather than just individuals. The aim is to engage all community members and to involve different networks and groups. Involvement needs to be meaningful and positive for individuals, for your organisation and the community.

**Focus on capacity.** In engaging volunteers an understanding of the capacity of the community and community members is important. The *Willing & Able* approach is focused not just on utilising the gifts and skills of each community member, but also on how to develop their interests and capacities for the benefit of your organisation and community.

**Flexible and adaptable methods.** Central to the *Willing & Able* approach to working with volunteers is the clarity of philosophies, values and aims of the program or project you wish to undertake. The methods and processes that most effectively achieve your aims can then be determined. In this way options that are able to be adapted to a range of museum situations can be explored.

**Leadership and facilitation.** The *Willing & Able* approach relies on formal and informal leadership. How leadership is exercised in the *Willing & Able* approach is quite different from traditional models. Leaders who work with volunteers facilitate involvement rather than directing or managing it. Facilitative leadership is primarily focused on eliminating barriers, providing pathways for involvement and supporting and managing the pathways, rather than the people.

These themes are pivotal to the *Willing & Able* approach. As you will see, these approaches can make a substantial difference to the vitality and effectiveness of your volunteer program.

The term 'volunteering' can mean different things to different people. Your understanding of the term 'volunteering' may affect how volunteers are viewed, who volunteers in your program and how you work with volunteers. The following information, and the exercise 'Who is a Volunteer' on the next page may help you to identify what your own interpretation of the term 'volunteer' is and how this might impact on your program.

## So what is Volunteering?

Volunteering Australia defines formal volunteering as an activity which takes place in not-for-profit programs or projects and is undertaken:

- to be of benefit to the community and the volunteer
- of the volunteer's own free will and without coercion
- for no financial payment
- in designated volunteer positions only

Under this definition, there are some forms of 'work' that are not considered to be volunteer work. Such forms of unpaid work are work experience; community service orders; student placements; unpaid work trials; work for the dole schemes; carers.

Your decision about 'who is a volunteer' is likely to be informed by a number of considerations.

- Most significantly, how choice is defined. Choice is a rather complex thing. When all the factors influencing a person's decision to volunteer are taken into consideration a wide variety of influences are evident.
- How the connection between volunteer work and an individual's motivations are viewed. One of the recent shifts in community attitudes is that volunteering is recognised as being beneficial for the individual volunteer as well as the community. Are some motivations for volunteering okay and others not? Attitudes toward different motivations will have an impact on how volunteering is defined in your organisation.
- Your views about the nature of paid and unpaid work. Your own perspectives and experiences of what is — or should be — paid work and volunteer work will also influence how volunteering is defined for you and for your organisation.

## Community involvement

While Volunteering Queensland's formal definition sets some clear boundaries, the *Willing & Able* approach sets the scope of volunteering more broadly.

Volunteering is community involvement. Some people may have traditional altruistic reasons; others may simply wish to meet people in the area. Some join because they are asked, or because a friend is involved, and others may want to try something new or learn new skills. This may be in the form of one-off assistance or may be in the continuing service of a program or community cause.

Volunteering is a way for people to connect with community, for whatever reasons. Some may have traditional altruistic reasons, some may wish to meet people in the area, some join because they are asked or a friend is involved, and others may want to try something new or learn a new skill.

Volunteering is a pathway for people to get involved.



## Exercise: Who is a Volunteer?

Directions: You will need paper and pens to record your responses.

As a group consider and discuss the following scenarios. Which people described below would you consider were volunteers?

- An employee granted time off from work with pay to work in their local museum.
- A teenager who offers to assist in administration and computer work within a museum in order to establish an 'employment' history.
- A child who assists in setting up booths at a fair because her parents are involved.
- A student who participates in a work experience placement. The placement is not compulsory, although other options are never discussed with the student.
- A local community member who initiates a protest against a local community group because their popularity has created traffic hazards in the area.
- A interpretive guide who participates only during holidays from their paid work.
- A 'Friend of the Gallery' who coordinates a fundraising campaign.
- A person who runs free art workshops in a privately run gallery without remuneration.
- A mother who agrees to take on a role within the community gallery when all others refuse, but only as long as her daughter's art continues to be shown.

Within the group discuss how the group defines the term 'volunteer'. In your discussions you may also wish to consider the 'Principles of Volunteering' listed on the next page and the tip below in your discussions. When you have come to agreement about how your organisation will define volunteering, put it in writing. (see Chapter 2.5 Policy and Procedure)



The following principles may be useful in assisting you to define your attitudes to volunteering and therefore appropriate ways to work with volunteers within your program and community. Examine these principles and assess whether they are an accurate reflection of your organisation's view of volunteering. If so, they can be adopted as principles for your volunteer program. If not, they can provide a basis for discussion and development of your own 'principles of volunteering'.





## **Principles of Volunteering**

- 1.** Volunteering benefits both the community and the volunteer.
- 2.** Volunteer work is unpaid.
- 3.** Volunteering is always a matter of choice.
- 4.** Volunteering is not compulsorily undertaken to receive pensions or government allowances.
- 5.** Volunteering is a legitimate way in which citizens can participate in the activities of their community.
- 6.** Volunteering is a vehicle for individuals or groups to address human, environmental and social needs.
- 7.** Volunteering is an activity performed in the not-for-profit sector only.
- 8.** Volunteering is not a substitute for paid work.
- 9.** Volunteering respects the rights, dignity and culture of others.
- 10.** Volunteering promotes human rights and equality.



Over the last five years there have been several trends in our communities that have had a direct influence on the world of museums and the world of volunteering. Let us consider how some of these trends are impacting on volunteer programs.

## Changing perceptions of volunteering

### Greater recognition of volunteers and their contributions

There is an increasing public recognition of the valuable contributions that volunteers make across all sectors of society. This has been heightened by events such as the International Year of Volunteers (2001) and the Sydney Olympic Games (2002). Increased recognition also means that volunteers are often seeking more from their volunteer work in return.

### Increased recognition of volunteering as a way to develop or maintain work skills

Community organisations, all levels of government, and volunteers are acknowledging that volunteering plays a central role in assisting people to develop skills, maintain work skills, or network towards paid employment. A number of government schemes, such as the Voluntary Work Initiative, and Mutual Obligation, are currently in place to encourage volunteering among job-seekers. In various fields of study, volunteering is being seen as a way to develop or provide evidence of practical skills that compliment a theoretical study base.

### Corporate involvement in volunteering

In corporate domains volunteering is being seen as a way to develop rapport and maintain credibility within the community. A number of companies are actively encouraging their employees to become involved in volunteering, with a significant number instituting employee volunteer programs. Such programs provide employees with the opportunity to either volunteer as a workplace group, often in one-off event situations, or to regularly volunteer as part of their employment.

## Impacts of changing perception on volunteering

- Greater recognition of volunteering may provide more opportunities for more funding for volunteer programs.

- Greater recognition of volunteering has meant an increased number of people volunteering throughout Queensland.
- Volunteers are now seeking formal or specific recognition for the work that they do.
- There has been an increasing range of volunteer opportunities highlighted during past years, which has facilitated greater choice for volunteers, and increased competition among programs for some 'types' of volunteers.
- Many job-seekers are engaging in volunteer work. The opportunities and challenges this presents for a program include: a greater requirement for providing and documenting training, provision of job descriptions and meaningful work, and more short-term volunteering.
- Corporate volunteer programs may provide new recruitment and skill-sharing opportunities while also providing different challenges for using skills effectively.
- Corporate partnerships may boost resources, while also challenging the philosophy of a volunteer program.

Consider how your museum's volunteer program might work with — or benefit from — these trends and impacts. What challenges and opportunities do they present?

## Changing volunteer demographics

### Decrease in 'traditional volunteers'

Museums, like many other community organisations, have often relied on traditional pools of volunteers. Often the founding members of the museum are still the most active volunteers. The volunteers on whom the organisation relies most can often be an older group of people who were not in, or are no longer in, the paid workforce. This traditional pool from which volunteers are most often recruited has decreased for a range of reasons, for example, as more women enter the workforce, and more senior volunteers are less able to continue.

### **Increase in the diversity of those volunteering**

An increasingly diverse range of men and women across all age groups are volunteering. In particular, the number of young people volunteering has increased. In addition people from a range of cultural backgrounds and varying levels of education are represented in greater numbers amongst those willing to volunteer. These changes in the volunteer 'pool' often mean that new ways of attracting volunteers to your organisation and retaining them may be needed. Volunteers tend to get involved in organisations where they feel comfortable.

### **An increase in volunteers with support needs**

As volunteering is increasingly being recognised as beneficial for the individual volunteer as well as the community, there is an increasing interest from volunteers with identified support needs or disabilities. Volunteering is seen as a way to get involved in the community and to provide a certain level of 'rehabilitation'.

### **Volunteers have higher expectations**

Volunteers have higher expectations about what they will gain from volunteering, and are increasingly open about their needs and expectations. Volunteers are expressing a greater spread of motivations for volunteering and interests that they would like to pursue through volunteering.

### **Impacts of a diverse volunteer pool**

- The volunteers relied on in the past may no longer be able to continue.
- Different 'types' of volunteers will come with a different set of needs and expectations requiring different approaches to working with volunteers.
- The museum may need to re-evaluate all aspects of its volunteer program to see if it can be more effective in encouraging and supporting volunteers with diverse needs and expectations.
- Consideration will need to be given to how the museum works with people who have support needs.

Consider how your museum's volunteer program might work with — or benefit from — these trends and impacts. What challenges and opportunities do they present?

### **Changing external environment**

Increase in accountability requirements

All community organisations — particularly those receiving government support or grants — need to be accountable. Granting and funding authorities will require it, and the general public expects it. This has led to a focus on quality systems, accreditation and accredited training, and greater focus on evaluation and reporting.

### **Greater awareness of risk management issues**

Over the past few years there has been a growing awareness of the importance of workplace health and safety, duty of care and other risk management measures that protect volunteers and organisations.

### **The changing nature of work**

Volunteering is a form of work and reflects to a significant degree changes being felt in the employment sector. The changing nature of work and workplace issues include: the increased use of technology, the move to a greater focus on short-term projects and the less defined boundaries between paid and unpaid work, and between contract and salaried staff.

### **Impacts of a changing environment**

Museums may be required to devote increased resources (including time) to meeting requirements such as training and reporting.

Responsible risk management is likely to be a key focus for any volunteer program and gaining commitment to risk management from all stakeholders will be required.

The demands of increased accountability and risk management strategies need to be balanced against the need to maintain a strong people-focused volunteer program.

Educating current volunteers about new technologies and providing opportunities for those who are seeking to work with new technologies will be a higher priority.

Consider how your museum's volunteer program might work with — or benefit from — these trends and impacts. What challenges and opportunities do they present?

## **Volunteering in the museum sector**

The Australian Bureau of Statistics estimates that about 2.6 million people volunteers their time (more than 433 million hours) to various activities, causes and groups each year. Of that, only about 3.6 per cent of all volunteers give their time to arts and cultural organisations.

The majority of volunteers are involved in helping with schools (school councils, tuck shops, etc.) Scouts, and girl guides, sporting clubs, meals on wheels and other activities. Nonetheless, volunteers in the arts sector are essential to the ongoing development of — indeed the very existence of — cultural activity in Australia.

Volunteers in museums undertake a wide variety of activities including:

- front of house activities — meeting and greeting, admissions, information
- public programs — acting as guides, demonstrators, activators, running education programs and presenting lectures
- visitor services — answering questions, staffing help desks, assisting visitors with research queries
- back of house activities — cataloguing, data entry, cleaning, conservation work
- fundraising — organising fundraising activities, contacting potential donors
- Events — designing and implementing event programs, including openings, hosting VIPs, etc.
- community education — networking within the community, speaking to schools and community groups, taking outreach programs to rural and regional areas

### *Volunteering in action — museum stories*

#### **Corporate involvement in volunteering**

Global Arts Link (GAL) has found its partnership with C S Energy to be mutually satisfying. The GAL Volunteers take great pride in showing off their wonderful venue and the Corporate Volunteers are pleasantly surprised to find that they quite enjoy this totally different aspect of their work. Very few of the volunteers have spent much time in an art gallery and they just wanted to experience something different. Others were looking for areas of interest for their retirement.

Several C S Energy workers have expressed interest in coming back for a second stint of volunteering and some are planning to become volunteers in their own time. Whilst they are Corporate Volunteers at GAL they receive automatic membership of the Ipswich Arts Foundation, all benefits of the volunteer program as well as free membership of the Friends of GAL. It is a great exercise in public relations for both organisations and introduces an entirely new group of people to the world of art.

Our main gallery is sponsored by C S Energy so during their stay at GAL, the Corporate Volunteers are encouraged to research the history of the mining industry in Ipswich and to become familiar with the exhibition in the main gallery. Their role is to maintain a presence in that gallery and 'fly the flag' for their employers as well as for GAL.

This model can now be adapted and extended to other business and organisations who may feel they would like to participate in 'giving to the community' through their corporate involvement with GAL.

#### **Marie Giess**

Coordinator of Volunteers

**Global Arts Link, Ipswich City Council**



### **Meeting volunteer's needs: Increased recognition of volunteering as a way to develop or maintain work skills**

The government's Mutual Obligation scheme has proven to be a bonus not only to the Global Arts Link (GAL) volunteer program, but for many of the people who are participating in that program as well.

GAL wins through the participation of early retirees who have current skills and a desire to continue working. Some of the participants believe that the opportunity to volunteer and use their skills for a good cause has given them a new lease on life.

It would be a shame however, to forget those who volunteer for all the 'old fashioned' reasons — we mustn't let our need for 'professionals' overcome our ability to offer opportunities to volunteers who want to be involved simply because they love the community or they need the social contact. They can be professional, too, if we help them achieve the standards we desire.

One of the great things that has happened through the Mutual Obligation Program is that the GAL volunteer program, traditionally dominated by mature aged females, now boasts approximately 36% men — who are thoroughly enjoying their rather non-traditional roles within a museum/gallery. It has been my experience that the program seems to work more smoothly with this more evenly balanced gender involvement.

**Marie Giess**

Coordinator of Volunteers

***Global Arts Link, Ipswich City Council***



# Internal environment: Attitudes for effectiveness

The *Willing & Able* method of working with volunteers is governed by some key value-based approaches. In a group or organisation the culture — the way we do things around here — can be a stronger influence on behaviour than formal systems or structures.

The following are components of a holistic, human-centred approach to working with volunteers. The development of a holistic, human-centred approach to working with volunteers forms a foundation that can strengthen and ensure the success of a volunteer program. It recognises that volunteers come not only with their own skills and knowledge, but also with their own experiences, life perspectives, needs and expectations.

The following are some of the elements that can help create a healthy and effective volunteer program.

## Partnership

Volunteer programs are a delicately balanced partnership between an organisation's needs and the needs of individual volunteers. A partnership approach can open ways to meet the needs and expectation of both. If the needs of volunteers are not met, recruitment and retention rates may be low. If the program is too focused on the needs of volunteers, then the organisation's goals and outcomes may not be achieved.

### *Signs of Partnership:*

- Volunteers are satisfied with the roles they are currently undertaking
- Volunteers feel able to re-negotiate their roles
- Paid staff are able to make requests, provide suggestions and give feedback to volunteers
- Paid staff are comfortable receiving requests from volunteers

## Trust

The feeling of trust between people involved in a volunteer program is fundamental to its effectiveness. The harmony of the group — and each individual's enjoyment in being part of the group — relies on mutual respect and trust. Creating an environment of trust is essential if volunteers are to take responsibility, complete activities, speak up, demonstrate initiative and take risks. Trust is a determining factor in the ability to negotiate through any disagreement or conflict.

### *Signs of Trust:*

- Willingness to share information freely
- Willingness to take risks without fear of being punished for mistakes
- Open communication within a group or organisation about needs and expectations
- Willingness to take responsibility for role/s, and to follow through

## Understanding

Empathy has a major role in communication and in the valuing of volunteers. Seeking to understand an individual regardless of the position they hold (volunteer, paid staff, management committee member or visitor) not only demonstrates concern for that individual, but also minimises potential for misinterpretation and disagreement. Empathy not only includes listening to comments or suggestions but also inquiring and seeking to understand 'the why' or the motivations behind a person's suggestions and comments.

### *Signs of Understanding:*

- Willingness to express divergent points of view
- Individuals feel heard when they express opinions and suggestions
- Willingness to ask questions
- Individuals feel comfortable sharing aspects of their personal life

## Opportunity

Opportunity is the focus on what is possible. Programs that ask 'How can we make it work?' rather than simply 'Will it work?' open up the creativity of those involved, demonstrate a commitment to development, and generally create a positive atmosphere. These factors are also a cornerstone for creating an environment which encourages contribution — and therefore ownership — of a program.

### *Signs of Opportunity:*

- Willingness to greet new ideas with enthusiasm
- Willingness to participate in planning, feedback and evaluation
- Willingness to discuss new ideas, and follow up on any action required

## **Agreement-Seeking**

The greater the level of agreement about an issue, the more powerful the commitment to resolving or achieving it will be. It is therefore important that wherever possible, decisions are reached by consensus.

Agreement among individuals, and therefore by the group, regarding fundamental issues such as the aims of a particular program or activity or new direction for a program is especially important. Agreement about key issues promotes a shared understanding and supports informed decision-making by individuals.

As part of this process it is also important to acknowledge areas of disagreement and to develop ways of dealing with difficult or complex issues.

### *Signs of Agreement-Seeking:*

- Individuals are aware of and informed about changes
- Individuals create opportunities for discussion, debate and dissent
- High levels of commitment to the aims and principles of a program
- Groups and individuals are comfortable with most changes



### **Things you can do to promote the Willing & Able approach:**

- Disseminate information widely in ways appropriate to the individuals involved
- Include representation of all stakeholders in meetings, planning, evaluation and information sessions
- Negotiate volunteer arrangements and monitor the development/progress of volunteers and their work
- Create open forums for communication and discussion about needs and expectations
- Train people in communication skills, and be prepared to give feedback about how effective communication is in the program
- Establish ways for people to express ideas and make suggestions in constructive ways and encourage their use
- Acknowledge all suggestions and communicate with individuals when their ideas are not taken up
- Support new ideas and initiatives that are in line with the direction of the organisation
- Seek out opportunities for development



1.6

## Volunteers in our museum?

A volunteer program is usually the most feasible or logical way to get things done and to involve the community in your activities.

**STOP!**

**Is a volunteer program the best option for your museum?**

Establishing a volunteer program and working with volunteers is a challenging undertaking. It is a common mistake to underestimate the time, effort and resourcing that goes into sustaining a healthy and effective program. There are many stakeholders in a volunteer program including the management committee, paid staff, funding bodies, current volunteers, museum friends and the broader community. Involving volunteers impacts on every part of your work.

Following are some issues to need to consider when deciding whether or not it will be appropriate to have a volunteer program in your museum.

Ideally the process of working through these issues is completed prior to commencing a volunteer program. However, it is also a useful exercise to re-evaluate existing programs.

This is an opportunity to assess how realistic your expectation for volunteer involvement are — and to consider the views of the coordinator, paid staff, volunteers themselves and other stakeholders.

### 1. Reasons for involving volunteers

- *What is the key reason/s for having a volunteer program?*
- *How does volunteer involvement fit with the mission and philosophy of the museum?*
- *What role will volunteers play in achieving your objectives?*
- *What can volunteers offer the museum?*
- *What will the museum offer volunteers?*
- *What would happen if volunteers were not involved in your organisation?*

In thinking about these questions consider not only whether volunteers are appropriate to your museum, but also the role they will have and how the volunteer program will be structured.

Often there is enthusiasm for the idea of involving lots of volunteers, without sufficient consideration being given to exactly why volunteers are necessary. This can often lead to confusion among other staff, and to a problematic working environment for everyone.

A clear reason or rationale for involving volunteers will help ensure that your volunteer program attracts or retains suitable volunteers.



#### ***Time For You To Consider***

**What are the main/fundamental reasons for your museum to involve volunteers? If you have difficulty answering that question, you may not be ready for volunteers. (see Exercise 'Develop your Volunteer Rationale' P1.12)**

### 2. Organisational culture

- *What attitudes, beliefs and traditions are fundamental to your organisation and how it functions?*
- *What impression and impact will your current staff and ways of doing things have on new volunteers?*
- *What attitudes and beliefs about volunteers does your organisation hold?*
- *How welcoming is your organisation?*

Attitudes and beliefs inform the work of an organisation, relationships between people, how they work together and how they view the world. These are often reflected in the culture of an organisation — the "how we do things around here". It is critical the museum's culture is welcoming and will value volunteers if the *Willing & Able* approach is to be successful.

Consider attitudes and behaviour in museum and how these may impact on newcomers, especially those who may be different, such as young people, corporate volunteers, people from different cultures, job seekers, people with disabilities, and Indigenous people.

- *How do people interact with each other?*
- *Is the atmosphere formal or informal?*
- *What language is used?*



- *What are the acceptable and unacceptable forms of dress?*
- *What are the attitudes towards those who volunteer?*
- *Are volunteers seen as exploited?*
- *What do people think motivates volunteers?*
- *How much do people value volunteer involvement?*
- *How do people feel and act toward those who are different to themselves?*



***Time For You To Consider***

**What is the culture of your museum? Will it welcome and support a range of new volunteers?**



## **Exercise: Develop your Volunteer Rationale**

Directions: You will need paper and pens to record your responses.

As a group discuss and write down a statement that articulates your organisation's rationale for involving volunteers. You may also find it useful to refer to Chapter 2.1 'Rationale for Community Involvement'. The statement could be developed by a nominated person (and feedback gained), or generated as a group with someone nominated to finalise the statement.

### **3. Roles, responsibilities and relationships**

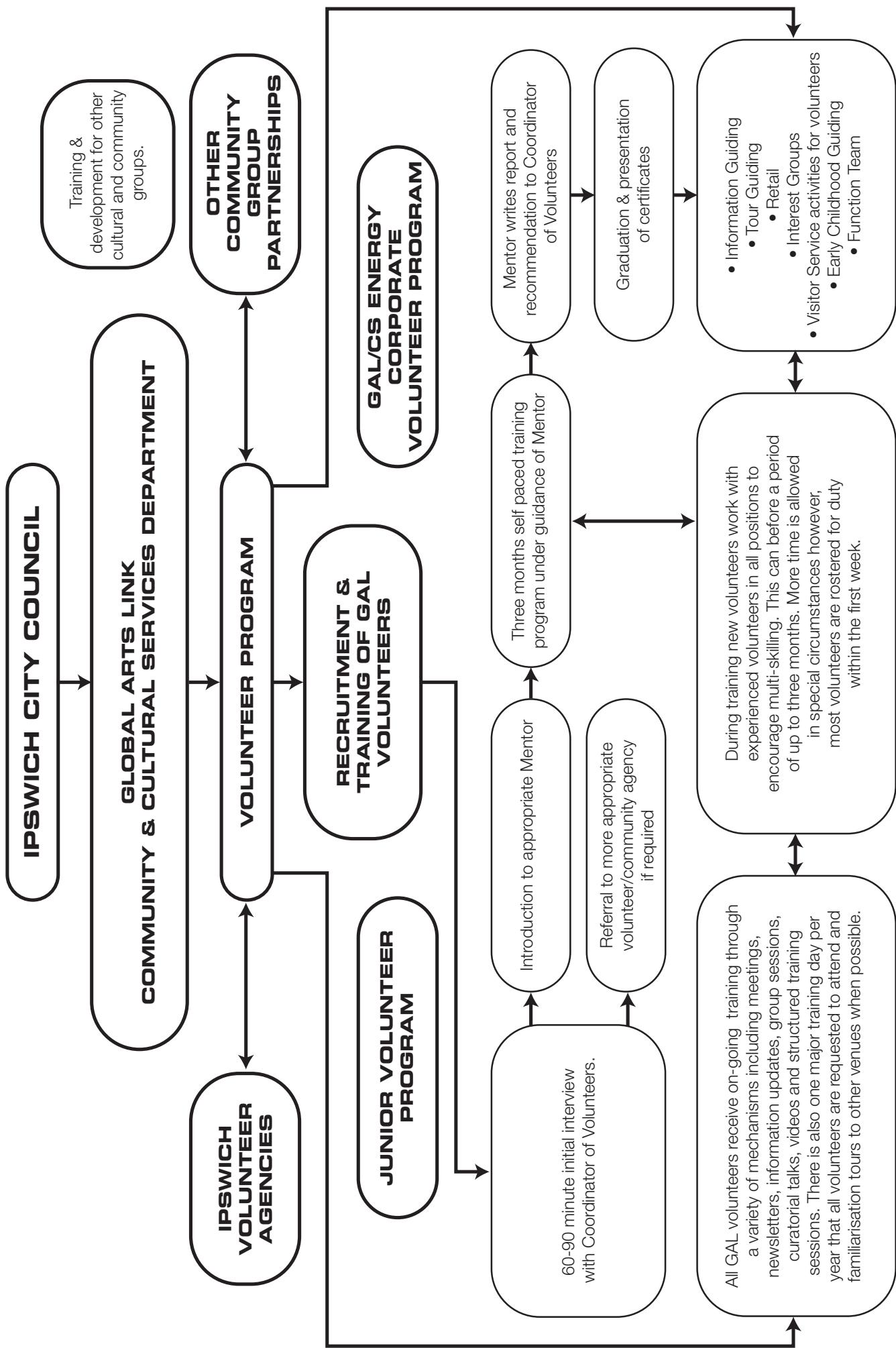
- *How is the work of the organisation structured into job roles and responsibilities?*
- *What are the areas of potential?*
- *What current relationships exist and how inclusive are they?*

In considering whether volunteers can be effective, it is useful to think about the roles and tasks volunteers are likely to be undertaking. What are the possible job roles and responsibilities they might have? You may need to look at current work and workloads and at the same time explore potential areas of development or expansion. Also consider project-based or short-term work. Reflecting on job roles will also help clarify the level of volunteer involvement your organisation requires and how volunteers need to be supported and coordinated.

You also need to consider the impact on existing relationships as more volunteers or new volunteers are introduced into your organisation. Relationships play a vital role in how decisions are made, how people work together and how volunteers will fit into the organisation.

Consider the following questions:

- *Is the work of the museum best done by a group of specialists or is there room for a range of people to be involved?*
- *Is the role volunteers will play in your museum clearly defined and generally understood and agreed?*
- *Are the skills and knowledge required to fulfil the roles that have been identified for volunteers available within your community?*
- *Can the roles and responsibilities you require be fulfilled by volunteers who work only one or two days a week or less?*
- *Is there an atmosphere of trust and openness in the museum which allows for a sharing of responsibility?*
- *How much does your organisation value new ideas and fresh input?*
- *How will current roles and relationships change when new volunteers join the museum?*





### ***Time For You To Consider***

If you haven't considered these questions and agreed on appropriate approaches you're probably not ready for volunteers.

## **4. Resources for community involvement**

- *What resources (physical, financial and human) will you need within your museum to sustain a healthy volunteer program?*
- *Are you able to support an on-going volunteer program?*
- *Have you identified leaders with adequate time to coordinate and support volunteers?*

Volunteers are often considered a free resource, yet volunteer programs require substantial resources to be effective, including significant amounts of time.

Resources include:

**Physical:** work space, storage space, a place to have lunch, facilitates (such as toilets), supplies and equipment, etc.

**Financial Resources:** additional expenditure on phone and fax, insurance, recognition events, etc.

**Time:** significant staff time for training, support, supervision, etc.



### ***Time For You To Consider***

Do you have the necessary resources to support a volunteer program?

## **5. Barriers to community involvement**

Consider the range of personal and professional circumstances that volunteers live in. What kind of problems might they be dealing with? How might volunteering fit (or not fit) with people's lives?

Barriers might include:

- *Accessibility of your location*
- *Language or literacy barriers*
- *Cultural barriers*
- *Public perceptions of the organisation*



## **Exercise: Dealing with barriers**

Directions: You will need paper and pens to record your responses.

As a group discuss and identify some obstacles potential/existing volunteers may face that prevents them from working with your organisation.

Consider how these barriers could impact on establishing or maintaining a volunteer program. What could you do to overcome these barriers?

Record your responses. Remember, your responses may be useful when working through Chapter 2.3.



## CHAPTER TWO

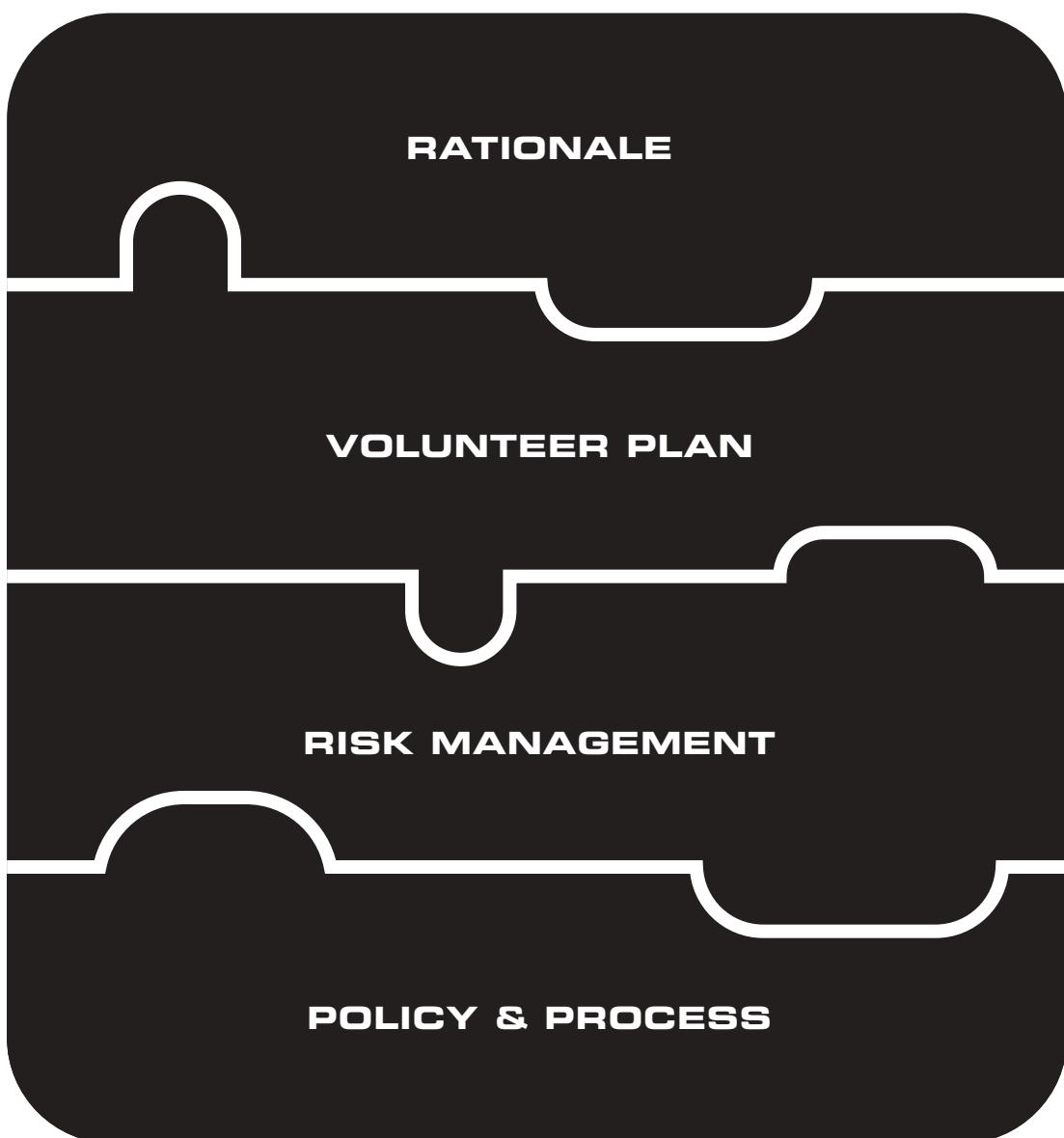


GETTING ORGANISED





## Model for preparing for community involvement



This model demonstrates how the elements of preparation and planning fit together. While there is a clear order of process, this order is not necessarily linear. The parts of preparation fit together like a jigsaw puzzle with links and connections between each of the components.



2.2

## Rationale for community involvement

The Willing & Able approach to working with volunteers aims to cultivate common agreement and direction within a volunteer program. An effective team approach can be facilitated through the development of:

1. A 'Rational for Volunteer Involvement' clarifies the intention, reasons and benefits of involving volunteers in your museum and is endorsed by all staff.
2. A statement of 'Values' or 'Principles' – that represents an agreement about beliefs, behaviours, ways of working with volunteers in your organisation.

### Understanding your program

In developing a 'Rational for Volunteer Involvement' and a 'Statement of Values' which will be appropriate for your museum, you should consider the following:

**Why:** Why does the museum exist?

(Vision/Mission)

**What:** What does the museum do?

(Aims/Goals)

**How:** How does your museum operate?

(Structures/Processes)

**Who:** Who are your audiences? (Visitor/Target Audiences)

**When:** When does your museum provide services/activities? (Hours)

**Where:** Where do you provide your services/activities? (Location/Region)

These factors will inform the on-going development of the volunteer program.

### Rationale for Volunteer Involvement

A 'Rationale for Volunteer Involvement' serves as a statement of purpose. It describes why volunteers are involved, and so reinforces understanding and motivation for all those who commit to it.

It is important to consider the principle reasons for involving volunteers in your organisation. The reason will influence your approach to program development and to working with volunteers both as a group and individually. Some principle reasons might be:

- **To ensure the museum functions and remains viable.**

Volunteers may be necessary to keep the museum operating and to maintain the collection.

- **To enhance and extend the work of paid staff within the museum.**

Volunteers may work primarily to assist paid staff.

- **To enhance the quality of experience for visitors.**

Volunteers may act as guides or information officers to assist visitors to maximise their experience within the museum.

- **To develop new areas or projects for the museum.**

Volunteers may explore new opportunities and activities that the museum currently does not have the capacity to undertake.

- **As part of a commitment to community involvement and development.**

In this case the volunteer program may reflect specific community expectations of the museum and its role in the community.

### Examples of 'Rationale for Volunteer Involvement'

- Achieving the vision and goals of the Museum will rely on the active participation of members of our community. To this end, Museum will encourage and support the involvement of volunteers within all its programs and activities.
- The Museum recognises the importance of community involvement in achieving its aims. Through the involvement of volunteers, their commitment, their knowledge, skills and energy, the Museum is able to provide a range of vital services to the community.
- Volunteers play a central role as community organisers and promoters for the Museum. Through research, public speaking, networking and the development of exhibitions, volunteers ensure we are able to connect with and represent our community.
- The Volunteer Program of the Museum provides opportunities for community participation in the museum. We will seek through our Volunteer

Program to reflect the diversity and interests of our community.

### **Statement of principles or values**

Developing a rationale is important when you consider the diversity of people in your organisation and the range of opinions, attitudes and work ethics they bring to the organisation.

In creating a healthy and effective volunteer program it is useful to acknowledge the differences, but also create some agreed ways of working. The Statement of principles provides basic ethical guidelines and articulates the values that are important to the whole group; particularly, values that are not likely to be captured through other planning processes. Principles can form the basis of organisational culture and accepted behaviour, and contribute to the unity and synergy of the group. Principles may take a number of different forms, including: a simple set of principles, a charter, a code of practice, or a set of rights and responsibilities.

Chapter 1.3 'Defining Volunteering' provides one example of a set of principles. The following 'Rights and Responsibilities' are another examples of a set of principles. Use these examples to assist you in completing the exercise 'Developing a Statement of Principles or Values'.

# **Rights and responsibilities**

## **Volunteer rights**

The right to.....

- a job description clearly stating the aim of the job and tasks to be undertaken by the volunteer
- a suitable assignment with consideration for personal preference, temperament, abilities, education and employment background
- be treated as a co-worker not just free help
- know as much about the organisation as possible, its policies, its people and its programs
- continuing education on the job as follow-up to initial training, providing information about new developments
- training for the job, thoughtfully planned and effectively presented
- sound guidance and direction by someone who is experienced and well-informed and who has the time to invest in giving support and supervision
- a place to work which is an orderly designated place, conducive to work and worthy of the job to be done
- promotion and variety of experience through advancement to greater responsibility or by transfer from one activity to another
- be heard, to have a part in planning, to feel free to make suggestions, to be shown respect for an honest opinion

## **Volunteer responsibilities**

The responsibility to.....

- examine motives and be sure that they match the volunteer job
- understand purpose and philosophy of the organisation before committing to it
- understand rules and guidelines of the organisation.
- be loyal to the organisation
- be willing to train for the job and take part in ongoing training when offered
- accept support and supervision
- participate in planning and feedback about the job.
- be reliable
- work as a team member
- maintain appropriate confidentiality

## **Organisation rights**

The right to.....

- receive as much effort and service from an unpaid worker as a paid one, even on a short-term basis
- expect conscientious acceptance of responsibilities as to promptness, reliability and good performance
- expect enthusiasm and belief in the work the organisation is doing
- express opinions about poor volunteer effort in a diplomatic way and suggest a change to another job
- make a decision as to where the volunteer would best fit
- expect from the volunteer clear and open communication at all times
- expect loyalty to the agency and only constructive criticism
- expect an effective work productivity from volunteers given leadership responsibilities
- release an unsuitable volunteer

## **Organisation responsibilities**

The responsibility to.....

- plan the volunteer program before recruiting volunteers
- recruit, interview and select the right volunteer for the right job
- provide written job descriptions and procedures for volunteer jobs
- orientate volunteers by providing information about the organisation's purpose, structure, programs, policies and procedures
- provide initial training and ongoing training and feedback sessions
- include volunteers in decision-making where decisions affect volunteers' work
- keep records of volunteers' goals, training and feedback sessions
- communicate clear expectations and provide the appropriate support and supervision for volunteers
- formally and informally recognise volunteers' efforts in the organisation
- continually evaluate the efficiency and effectiveness of volunteers in the organisation



### **Exercise:**

### **Developing a 'Statement of Principles or Values'**

Directions: As a group, review the 'Principles of Volunteering' from Chapter 1 and the 'Rights and Responsibilities' included on the previous page. Consider what kind of principles might be the most useful for your group and/or develop your own principles.

One way to approach this task might be to:

Brainstorm some key values

Develop working definitions.

Prioritise a top 10.

Decide on a format.

Write the principles

Get feedback and agreement from stakeholders



2.3

## Planning

Once a 'Rationale for Volunteer Involvement' is agreed and written down, you can begin to translate these ideas into your plan for a volunteer program. No matter how urgently you require volunteers, it is essential that planning is undertaken as the priority.

Without a plan, confusion, false starts and disappointments can easily result. If activities and events are to operate smoothly, it is necessary to take time to plan effectively.

Your plan serves as a good tool for communicating aims and roles, as well as articulating the vision and direction of the program in a practical and tangible way.

There are six stages to the *Willing & Able* approach to planning a volunteer program. Use the following descriptions of these stages to help plan your own program, or to review your planning process and volunteer program.

### **Stage 1: Organise your planning team**

A small planning group (which may be a sub-group of your committee and/or staff) is likely to ease the workload and ensure that all bases are covered. Also consider bringing in people who can provide different perspectives and views of a volunteer program and who may have experience and ideas gained through working with another program. It is important to include people in the planning team who are willing to work with volunteers and who will champion the importance of a good volunteer program to others. Gain a commitment from the planning team to set aside an initial half or full day so you can work through the various stages of the planning process thoroughly.

### **Stage 2: Create a clear vision of your ideal volunteer program**

Creating a 'vision' for your volunteer program will help you set out the aims and direction of the program. Creating the vision help you articulate what you would like the program to do and achieve.

It may be helpful to enlist the aid of a facilitator for this process. The facilitator, who comes from either inside or outside the museum, will help the group work through the process of developing the vision. They can prompt discussion (using specific questions as outlined

below), record ideas and ensure everyone has an opportunity to participate.

Start by asking each individual the following:

'You are working in our museum 12 months/5 years from now and it has a vibrant and effective volunteer program.' What does each person see?

Each person can record their ideas on butcher's paper so these can be shared with the group. They may wish to write notes, draw pictures, tell a story and/or draw diagrams. While some may be reluctant at first, the facilitator should encourage group members to persist. Time spent on the project will be invaluable in determining the type of program you develop and what it aims to achieve.

Share each individual's vision and try to clarify and capture as much detail as possible. As a group discuss the various approaches and ideas. What are the common elements? Work toward a shared vision of how your organisation's volunteer program may operate. Record the group's agreed vision for discussion with others.

## **DEVELOPING A VISION**

A vision and mission statement is a must for the development of any volunteer program. The Global Arts Link volunteer vision and mission statements were developed from the big picture of what we, as a social history museum and art gallery, wanted the volunteer program to achieve for us, the community and the volunteers themselves.

It is much easier to move into the unknown when you have developed a structure to guide you. You can develop this yourself or with a group of people who share your vision. These statements logically lead to the development of an operational plan which is simply going through the process of putting your aims, goals and objectives on paper in a logical sequence.

Operational plans are simply that — how you will operate your volunteer program. Our vision and mission statements told us what we really wanted/needed — then it was a simple exercise to identify what to do.

Our vision helped us define our goals. (*Goals* being a fairly general statement of what you want to achieve). These goals were then placed in a logical sequence — the order in which things need to occur and the deadlines.

Out of the goals came the objectives — sometimes several for each goal. this is the list of all the things that have to be done to achieve your goal. You will then need to identify the strategies (actions) you need to implement to achieve these objectives. In other words — how are you going to do it? Who will do it? When?

You also need performance indicators — ways to measure how well you are going down the track to achieving all your objectives. It's amazing how much easier it is to get motivated and moving once you know where you are headed!

There you have it! — the basis of an operational plan made simple. Here are our vision and mission statements for the Volunteer program:

### **VISION**

*'Global Arts Link, linking – 'our place' to 'our people' through volunteering excellence'*

### **MISSION STATEMENT**

*'To contribute to the effective operation of Global Arts Link and to enhance the visitor experience by on-going review, training, recruitment and development of the volunteer program to ensure that our team of professional volunteers are working in compliance with the best practice principles of Volunteering Australia and the professional standards set by Global Arts Link'.*

**— Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council**

### **Stage 3: Eliminating barriers**

The planning group should now identify the barriers or difficulties you may face in trying to bring the vision into reality. You may have identified some of these issues in chapter one (organisational culture, roles and responsibilities, resources and access issues) and the ‘Dealing with Barriers’ exercise (P1:16) but there may be others.

Identify those barriers that you can do something about, then spend time developing ways to eliminate or work around them.

There may be barriers that are considered beyond your control. It is important to work within the constraints this creates or decide to do something about those as well.

### **Stage 4: Turning your vision into reality**

Now that the planning group has arrived at a shared vision for your volunteer program (Stage 2), identified barriers that exist between your current situation and achieving that vision, and then developed some strategies for dealing with these (Stage 3), it’s now time to put some practical structures and processes in place.

#### **Decide on the structure of your volunteer program**

Consider the fundamental aims of your program and type of support your organisation will need to ensure these aims are met.

For instance, what is the most effective way for volunteers to do their work within your museum? What infrastructure needs to be in place for the program to be effective?

Reflect on the practical aspects of having new people involved in your museum by considering the following:

- *Who is the best person to lead and support the volunteers?*
- *What other responsibilities need to be addressed in relation to the volunteer program?*
- *Will volunteers be working as individuals or in teams?*
- *Are volunteers required for a few hours, a few days or a longer period of time?*
- *How many volunteers will be required?*
- *What tasks will they undertake?*
- *How many volunteers can you realistically support on an ongoing basis?*

- *How will volunteers be required to operate in different areas of the organisation?*
- *How will volunteers be required to relate to other staff?*
- *Where is the best place for volunteers to work?*
- *What tools will they need to do their job?*

#### **Develop the roles volunteers will undertake**

In what ways can volunteers assist your organisation in the work you currently do, need to do, and would like to do?

In considering this question, think broadly. Consider:

- *What work never seems to get done, but should be done?*
- *How could the museum’s programs be improved by people with particular skills?*
- *What projects have been identified and discussed in the past, but no one has ever had the time to do?*
- *How could involving new, different or additional groups or individuals further develop the role of your museum in the community?*
- *What roles and responsibilities are appropriate and most effective for volunteers to undertake in your organisation?*

Addressing these questions will assist you to identify and develop the roles available to volunteers in your organisation. Once you have decided on these roles, use the job description form (Chapter 2 Page 2:12) to develop the initial job descriptions.

#### **Develop communication and information Systems**

Information flow is like the body’s circulation. Unless your program has healthy circulation systems, information will not end up where it needs to be in an accurate and understandable form. The flow of both verbal and written information needs to be considered, as both have equally valuable roles to play.

In developing communication systems, you need to determine the methods of information exchange that support volunteers communicating with each other; leaders communicating with volunteers; and volunteers communicating with leaders. Some common methods include meetings, newsletters, pigeon-holes, well-maintained notice-boards and email networks. (for further ideas refer to Chapter 4)

There may be some forms of information and communication that might be required at a later date. It is therefore important to consider what needs to be documented, so you have a reference in the future. This may be to manage risk, provide information for evaluation, or just to act as a reminder when the details are important. Some suggestions are:

- A register containing details relating to each volunteer eg. personal data, emergency information, dates and hours of service, and training/accreditation completed.

- Details relating to the operation of the program eg. number of volunteers, demographics of volunteers, and total number of volunteer hours contributed.
- Volunteer management operating systems eg., – recognition system, accident and incident reporting, insurance details, job descriptions/ selection criteria and training program.

### *Volunteering in action — museum stories*

#### **Starting from Scratch**

Where do you begin? What support do you need? How long will it take? These are key questions to ask at the start of the process. Here are some tips from a professional consultant to help you make decisions about volunteer programs for larger organisations. The concepts are similar for smaller museums.

- It takes about 3 months to set up a program, from go to whoa.
- The most crucial step is to get the senior management/CEO/board's wholehearted support.
- Make sure you understand why the manager/CEO wants a volunteer program, what he/she wants the volunteers to do, how the volunteers will fit into the organisation and what the organisation is offering volunteers.
- Tailor your program to suit the museum's requirements, after all, the staff/management have to make the program work — so make sure the program is something they like, with no surprises.
- Decision-makers need to be fully aware of the implications of creating and maintaining a volunteer program and must throw their entire support behind the program – introducing a volunteer program is introducing organisational change and this will happen only if the key stakeholders actively support the program.
- Senior staff/management/Board members must announce the program to staff and show support for the person starting up the program (preferably an outside consultant working closely with the Volunteer Coordinator and staff who will be supervising volunteers).
- Make the process entirely transparent for staff. They must know all there is to know about the program, their expected involvement, how the program will affect them. Give the staff the opportunity to ask questions and air their feelings on the issue. Staff and must own, support and want the volunteer program to happen.
- Staff must be prepared to spend time in getting the program operating and the manager must include this time in their work schedules.
- The volunteer coordinator needs to hold meetings with staff to tailor the program to suit specific staff and organisational requirements.

— **Deborah Cavanagh, Consultant Environmental Education and Tourism, Tropical North Eastern Australia**



## Stage 5: Develop an action plan and timeline

Use the following template and example as a guide for segmenting your vision into key planning areas that seem to fit together. This guide can also be used to identify areas of development.

### ACTION PLAN FOR ABC MUSEUM

**AIM/OBJECTIVE:** To develop greater connections with young people. **STRATEGY:** 1. Organise and hold an open day for young people on 12 October 2003.

TASK	RESOURCES (Physical/Financial/Time)	PERSON RESPONSIBLE	COMPLETION DATE	FOLLOW-UP/COMMENTS
<b>Strategy 1:</b>				
1. Identify available resources	Check date does not clash with other activities  Identify museum's capacity (How many people can be accommodated and what equipment will be needed)  Check event meets risk management guidelines  Identify approximate costs of tour materials, catering, etc.  ID staff and volunteers willing to act as guides	Margaret Barnes  Jill Bray liaise with Safety Officer  Mark Gatton  Tom Wool & Jenny Harboard  Tom Wool	Group Meeting 18 January 2003  Group Meeting 18 January 2003  Group Meeting 18 January 2003  Group Meeting 18 January 2003  March 2003	Checked, ok. MB X
2. Meet with school representatives to discuss concept and identify suitable date	Ask for representatives  Make appointments	Tom Wool – ask for 2 more  Jenny Harboard	Group Meeting 18 March 2003  Group Meeting 18 March 2003	
4. Draft proposal developed and with Management Committee for review	Develop and gain agreement on draft proposal and event plan	Jill Bray	First draft 4 April 2003 Final draft 18 July 2003	
5. Final proposal	Nominate member to present proposal	Chair: Group meeting	18 July 2003	
6. Coordinate events	Develop sub-group for event coordination		August 2003	
7. Evaluation				

## **Extract from GAL Volunteer Program Operation Plan 2002-2004**

### **GOAL 1:**

To ensure the on-going development of a professional volunteer program which is sensitive to the diverse needs of the Ipswich community, Global Arts Link, tourists, visitors and the volunteer staff.

OBJECTIVE	STRATEGY	TIME FRAME	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>• To carry out on-going review/development to ensure that the high standard of professionalism of the program is maintained.</li> </ul>	<ul style="list-style-type: none"> <li>• By ensuring that volunteers have access to current information at all times.</li> <li>• By ensuring that adequate staffing levels are provided to GAL at all times</li> <li>• By holding bi-monthly volunteer meetings</li> <li>• By ensuring that volunteers are recognised for their work at GAL.</li> <li>• Production of quarterly newsletter</li> <li>• Ensuring that volunteers have access to training appropriate to their needs.</li> </ul>	<ul style="list-style-type: none"> <li>• On-going</li> <li>• On-going</li> <li>• On-going</li> <li>• As required</li> <li>• On-going</li> <li>• On-going</li> </ul>	<ul style="list-style-type: none"> <li>• Level of knowledge displayed by volunteers in carrying out their roles in the gallery</li> <li>• Attendance records and sign-on book</li> <li>• Number of people attending meetings</li> <li>• Ability to maintain numbers and length of time served by volunteers</li> <li>• Lack of complaints</li> <li>• Increased media coverage</li> <li>• External recognition</li> </ul>

— Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council

## **Stage 6 Identify any costs and required budget**

Consider all the ways that volunteers are likely to require financial support —both directly and indirectly. There will be costs directly related to maintaining a successful Volunteer Program, but you also need to consider the additional ‘hidden’ costs that will add to your museum’s basic running costs. Identify all these costs and develop a budget. Be sure to consider the following:

### **Specific Program costs:**

- Training – volunteer supervisors
- Training – volunteers
- Insurance – directors and officers
- Insurance – personal accident
- Special events
- Recognition
- Uniforms & badges
- Conferences & professional development
- Resources & publications
- Promotion & advertising
- Recruitment
- Travel
- Reimbursement to volunteers
- Venue & equipment hire
- Subscriptions and memberships
- Motor vehicles
- Salaries – volunteer supervisors

### **Other existing costs:**

- Rent
- Phone & fax
- Mobile phones
- E-mail & internet
- Electricity
- Equipment
- Computer supplies
- Computer software
- Stationery
- Cleaning
- Insurance – public liability
- Photocopy supplies
- Postage
- Printing
- Repairs and maintenance



## Volunteer job description worksheet

<b>Area of Responsibility:</b>	
<b>Aim or purpose of the role:</b>	
<b>Sample activities:</b>	<ul style="list-style-type: none"><li>• What specifically will the volunteer be doing?</li></ul>
<b>Opportunities:</b>	<ul style="list-style-type: none"><li>• What are the benefits and new options (tangible and intangible) that will be available?</li></ul>
<b>Requirements:</b>	<ul style="list-style-type: none"><li>• What commitments are required in accepting this role? Time/Training/Attire/etc.</li></ul>
<b>Recommended skills or personal attributes:</b>	<ul style="list-style-type: none"><li>• Are there specific skills, knowledge, qualifications, qualities that are required? preferred/Advantageous</li></ul>
<b>Training and support plan:</b>	<ul style="list-style-type: none"><li>• What is available to assist the volunteer in successfully undertaking this role?</li><li>• Who is available to educate, support and monitor?</li></ul>
<b>Reporting:</b>	<ul style="list-style-type: none"><li>• What reports will be expected, in what form and how often?</li></ul>
<b>Signs/standards of success:</b>	<ul style="list-style-type: none"><li>• How will we know that the job/project is satisfactorily completed?<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol></li></ul>



**Volunteering  
Queensland**



## 2.4 Risk management

Risk management is the process of systematically identifying and controlling risks in order to protect the interests of an organisation, its workers and visitors.

Over the past few years there has been a growing awareness of the importance of workplace health and safety, duty of care and other risk management measures that protect volunteers and organisations.

Sometimes organisations can become so focused on possible dangers that rigid policies which reduce the work of volunteers to a minimum are introduced. While it is important to be as thorough as possible, a balance between organisational interests and the interests of volunteers needs to be found.

A commonsense approach to risk management can assist the development and implementation of appropriate risk management policies and strategies. Implementation is likely to be most effective when both staff and volunteers have input into developing risk management strategies and are therefore aware of — and committed to — the strategies.



For further museum specific information on risk management the following publications contain relevant sections (as listed in the bibliography) that may be useful:

1. *Be Prepared: Guidelines for Small Museums For Writing a Disaster Preparedness Plan*
2. *reCollections: Caring for Collections Across Australia*
3. *Significant Events: a museums & galleries training program*
4. *Museum Methods: A Practical Manual for Managing Small Museums*

### Stage 1: Identify the risk

The first step is to identify all the risks that could effect the volunteer program. This information should be gathered through the involvement of staff and volunteers familiar with the details of the organisation's volunteer program.

Some questions that will assist identification of risks include:

- *What possible dangers or hazards in the daily operation of the museum might affect volunteers?*
- *What are potential risk areas in our premises?*
- *What situations, activations, activities or events post potential dangers?*
- *What equipment and locations are used by volunteers?*
- *What problems and accidents have we had (or nearly had) in the past?*
- *What injuries or illnesses have occurred to those involved in the program?*
- *How does the museum's duty of care to its volunteers impact on identified risks?*
- *What state and/or federal legislation is application to the museums collections, activities and operations?*

### Stage 2: Evaluate risk

Once potential risks are identified you need to assess the likelihood of occurrence and the severity of impact should they occur. Risks can then be prioritised so they can be dealt with.

Questions to assist risk evaluation:

- *How likely is it that this risk will actually occur?*
- *How serious will the consequences be if it occurs?*
- *What would be the costs? (Including legal costs, fines and compensation) and potential impact on the museum's reputation and public image?*

### Stage 3: Control or management of risk

At this stage appropriate strategies for the management of identified risks are determined and implemented based on the risk evaluation. For most museums this means you will review your existing Risk Assessment Plan and Disaster Plan to ensure the roles, responsibilities and duties of volunteers have been included.

If, for example, your museum activates exhibits or machinery you will have written policies and procedures to ensure programs involving volunteers are conducted with due care and safety, training, and monitoring. Log books should be maintained for each piece of activated machinery which identifies the name of the volunteer using the equipment and the date, time and length of use of each machine. Also include

pre-and post-use maintenance and storage of equipment.

Once you have identified risks your risk management strategies will probably include ways to:

- Avoid the risk – stop the activity or delay the activity until adequate preparation has been undertaken for the activity to be conducted safely eg. an unsafe display case is not used until it is repaired.
- Minimise the risk – changing operations to reduce the likelihood of the risk occurring. eg. changing volunteer selection, training and supervision to ensure all staff are more able to do their work safely.
- Minimise harm from events – putting strategies in place that minimise the severity of any harm if the risk does occur. eg. well rehearsed emergency procedures put in place to cope with disasters or signs indicating potential dangers.
- Carry appropriate insurance — your organisation as a responsibility to have insurance for volunteers as well as paid staff (see Insurance section in next column).

Consideration needs to be given to those in the organisation who will take responsibility for the implementation of risk management strategies. In the most successful situation risk management becomes a shared obligation and the ‘way we do things around here!’.

#### **Stage 4: Regularly review and update**

It is important to regularly review and amend your Risk Management Strategy to keep up with any changes and to make the organisation’s activities progressively safer. The same stages identified here can be used to undertake a review.

#### **Insurance**

Insurance enables an organisation to transfer specific risks to an insurer. Adequate and appropriate insurance for volunteers is essential for all community-based organisations and makes up one part of the organisation’s risk management strategy. Insurance should provide adequate coverage so volunteers are not at personal financial risk should some accident or other incident arise resulting in a damages claim. Similarly, appropriate insurance would provide coverage for the entire volunteer workforce of your organisation, and for all the roles they are involved in.

Volunteer insurance covering three types of situations should be considered by organisations involving volunteers:

- Personal accident insurance – applies where a volunteer is injured or dies as a result of an accident while they are volunteering or while travelling to or from their voluntary work. Volunteers are not generally covered by workers’ compensation schemes that are compulsory for paid workers in each state. Thus personal accident insurance is necessary to cover volunteers for costs resulting from such accidents. Coverage may include – death, disability both permanent and temporary, loss of income, home assistance, assistance with tutoring, carer support and non-medical expenses. Coverage varies from policy to policy.
- Public liability insurance – protects volunteers and the organisation should someone else be injured or their property damaged as a result of an accident caused by a volunteer undertaking their role for the organisation.
- Professional indemnity insurance – protects volunteers and the organisation in the case where information or advice given by a volunteer is incorrect.

**NOTE:** Be sure to check with your insurance agent about any restrictions which may apply in relation to coverage for older volunteers. Some policies do not cover volunteers over the age of 70. You will need to be aware of such limitations, as they can have a major impact on your ability to recruit new volunteers or retain existing helpers.



## **What legislation should I be aware of?**

The operations of voluntary organisations are influenced by state and federal legislation.

Organisations should therefore ensure they are aware of the legislation that applies to their organisation and the implications of that legislation.

In general, legislation covering the following areas will create obligations and rights that apply to organisations involving volunteers. It will include:

- Workplace Health and Safety ([www.whs.qld.gov.au](http://www.whs.qld.gov.au))
- Child Protection ([www.childcomm.qld.gov.au](http://www.childcomm.qld.gov.au))
- Anti Discrimination and Sexual Harassment ([www.adcq.qld.gov.au](http://www.adcq.qld.gov.au))
- Copyright and design acts ([www.copyright.org.au](http://www.copyright.org.au))
- Privacy Act ([www.privacy.gov.au](http://www.privacy.gov.au))
- Associations Incorporation Act
- Australian quarantine and Inspection Service (imported cultural materials)
- Firearms Act (firearms collections and storage)
- Fisheries Act (collecting marine specimens)
- Flora and Fauna Guarantee Act (natural history collections)
- Fundraising Appeals Act (fundraising activities)
- Heritage Act
- Protection of Moveable Cultural heritage Act
- Public Records Act (privacy, etc. for archives)
- Wildlife Protection Act

## **What is duty of care?**

Duty of care means being in a role in which your actions or lack of action can impact on another person to whom you owe some form of obligation. You need to recognise you have a duty of care to the volunteers who work within the museum and your volunteers will have a duty of care to those who visit the museum.

Implementing effective policies and procedures and providing training and support for your volunteers will assist in ensuring you exercise a duty of care.



## Policy and procedure

Misunderstandings, disagreements and general disharmony can develop in volunteer programs where expectations are unspoken or unclear. It is important to recognise that duty of care is based on what a reasonable person would do in a situation, and does not require you to be responsible for everything. While this is a true statement it raises a lot more issues and questions than it answers. I believe it should be left out. The *Willing & Able* approach to volunteer programs provides a model for developing and presenting policy that is user-friendly, accessible, and meaningful for all involved.

### What is a policy?

A policy is a written statement setting out an organisation's view or approach to a topic or issue. It sets an organisation's view or approach to a topic or issue. A policy is a guide to decision-making and generally identifies the scope, boundaries and consequences for the actions of staff (voluntary and/or paid). Policies should be officially approved by your management committee or board. A policy document is typically adopted for a period of one to three years, and then reviewed.

### What sort of policies are necessary?

In identifying areas where a policy is useful, it may assist you to consider what sorts of decisions staff and volunteers are asked to make. Decisions that affect policies or in effect create policy are made every day, but sometimes in an ad hoc way, often in response to questions relating to 'how do we do things here?' or 'how is this task done?'.

The following are basic topic guidelines but also some priorities to consider in determining what policy statements you may require. These topics are by no means exhaustive but are intended only as a starting point. Each organisation will have different needs. It is also important to remember that written policies are most useful when they provide an accessible and current framework or guide for day-to-day operations.

### Some policy examples include:

#### Values & ethical considerations

Some policies provide a rationale for the group and its actions, highlighting the things that are unique about what the group does and how the group operates.

These policies statements form the foundation for an organisation's culture, and communicate the underlying principles of organisational behaviour. Your 'rationale' and 'principles' are examples of policy and further examples include:

- **Relationship between paid and unpaid staff:**

For those who have both paid and voluntary staff there can be some concern about volunteers replacing paid staff. It is useful to set your own boundaries, and define how volunteers and paid staff complement each other.

- **Definition of a Volunteer:** As we saw in 'Defining volunteering' (Chapter 1, 1: 5), the term volunteer has different meanings. It is useful to consider and document who you consider to be a volunteer and their role in your museum, for the clarity of the program and insurance bodies.

### Management guidelines

These policies address issues likely to arise from the day-to-day management of a volunteer program.

In developing these policies consider: Where does risk or liability exist? What could cause us the greatest harm? How do we protect ourselves?

#### Such policies are likely to include:

- **Reimbursement of expenses:** Without a clear description of what constitutes reimbursement there can be legal issues relating to perceived 'payment' of volunteers.
- **Right of refusal (including any probation or trial period):** If you are ever in a situation where you need to refuse a volunteer, issues can arise in terms of what is seen to be a fair process. Documenting the possible rationale for a refusal can assist in managing this process objectively.
- **Grievance:** Complaints, conflicts and issues can undermine the effectiveness and credibility of an organisation. A grievance policy and process is



useful to manage possible damaging impacts when grievances arise.

- **Discipline/Dismissal of volunteers:** As with 'right of refusal', issues can arise around the justification and equity of disciplinary decisions. Documenting the possible rationale for dismissal can minimise the impact to the program. (see also Chapter 2.3 'Risk Management')

## Regulations and boundary-setting

There are often guidelines for conduct that may not be documented, but are important for everyone to understand. They are policies that describe rules and regulations, and suggest what is appropriate or inappropriate within the work of the organisation. These policies may include:

- **Representation in decision-making:** It can be useful for organisations to clearly identify who has the authority to participate in decision-making.
- **Speaking on behalf of the organisation:** Clearly identifying who has authority to represent the organisation can assist in eliminating misinformation and misrepresentation of the organisation.

## Developing policy

While many approaches to developing policy statements exist, the *Willing & Able* approach emphasises the value of succinct policy (combined with a relevant procedure). A policy statement need only be a few sentences that encapsulates the essence of the organisation's perspective on that issue.

## Considerations in Policy Development

The following questions can assist you to identify the policies your museum needs:

- *Why is this issue/strategy important?*
- *What is the purpose of the policy and to what does this apply?*
- *What are the rights and responsibilities implicit in the policy and who is responsible?*
- *When and where does this policy apply?*
- *Are there guidelines for applying this policy?*
- *Are there any exceptions to the rule?*



For further detailed museum specific information on policy development the following publications (as listed in the bibliography) may be useful:

1. *Be Prepared: Guidelines for Small Museums For Writing a Disaster Preparedness Plan*
2. *reCollections: Caring for Collections Across Australia*
3. *Significant Events: a museums & galleries training program*
4. *Museum Methods: A Practical Manual for Managing Small Museums*

## Policy development process

It is important to think about the process of developing a policy. How will your organisation go about establishing policy? Following is a suggested process.

1. Communicate with staff, committee members and others about the intention and aims of a policy, or policies, and outline their relevance to the volunteer program. Arrive at some agreement about the need and purpose of the policy or policies.
2. Collect information, gather ideas, discuss the scope, content and format of each policy.
3. Establish a working group to develop the policy statements.
4. Review organisational philosophy, principles and values (including the reason for involving volunteers) to ensure the policy is in line with these aims and values.
5. Write and distribute a draft, and seek feedback.
6. Test that your policies are clear and easily understood, by requesting feedback from someone who has not been involved in the development, or from outside the organisation.
7. Consider feedback and adapt as required.
8. Ensure management committee discuss and endorse the policy and set a date for review.
9. Distribute the policy.

Remember, a policy tailored specifically to your museum is likely to be more useful than one generated for another organisation. Adopted policies may not be inclusive of the views and issues relevant to your organisation, field or area.

Examples of a policy and process tailored to meet the needs of an organisation can be found on the following pages. Both the 'Volunteers Expenses Policy Statement' and the 'Volunteers Expenses Claim Form' have been reproduced with the permission of Global Arts Link, Ipswich and may be useful.

## **What is procedure?**

A 'procedure' is a description of an activity, task or role that provides a guide to how work should be done. A 'procedure' explains in details how a 'policy' is put into effect. One of the greatest challenges in a volunteer program can be ensuring consistency and quality in areas where there are many people, doing similar work in relative isolation from each other. A procedure can maximise consistency and quality, as well as providing a platform for formal and informal training in a role.

Procedures can be written in a number of forms, depending on what is most useful for those who utilise the procedure. Some common forms include written instructions or explanations, checklists or flow-charts. *Willing & Able* procedures aim to provide enough information to do the work effectively, balanced with brevity, to ensure they are user-friendly.

An example of a procedure – 'Fire Evacuation Procedure' – has been included on the following page. The procedure was reproduced with the permission of Global Arts Link, Ipswich.

# Global Arts Link Volunteer Program - Volunteer Expenses Policy Statement

*Implemented: February 1999*

*Reviewed Date: 2001*

## **Policy:**

1. It is Global Arts Link Volunteer Program Policy that volunteers should not be out-of-pocket for providing a service for the Global Arts Link Volunteer program.
2. Volunteers should not incur expenses on behalf of the Global Arts Link Volunteers program without the consent of The Coordinator or Global Arts Link Programs Coordinator.
3. Global Arts Link Volunteer Program reserves the right to disallow the payment of the expenses if they are satisfied that the claim is not legitimate.
4. Public transport eg: bus, train or ferry will be reimbursed on presentation of dockets.
5. Maximum payment allowed per volunteer per annum will be \$50.00. This applies June to June.

**Marie Giess**  
Global Arts Link  
Coordinator of Volunteers

**Sharon Ford**  
Global Arts Link  
Programs Coordinator

## **Global Arts Link Volunteer Program**

## Volunteer Expense Claims

Name: \_\_\_\_\_

**Address:**

Phone: \_\_\_\_\_

**Volunteers Signature:**

Please lodge with the Volunteer Coordinator by the last FRIDAY of each month.  
Receipts must be provided

Approved: \_\_\_\_\_ Total: \_\_\_\_\_  
*(Coordinator of Volunteers)*

Payment Received in full: \_\_\_\_\_ Date: \_\_\_\_\_  
*(Volunteer's Signature)*

SAMPLE ONLY

Excerpt from Global Arts Link Volunteer Handbook. Reproduced with the permission of Global Arts Link.

# WHAT DO I DO IF THERE IS A FIRE AT WORK?

## (GENERAL INSTRUCTIONS)

When detecting a fire in your workplace, the following instructions apply:-

- \* **DO NOT PANIC**
- \* Alert persons nearby and request assistance from area Fire Wardens
- \* Call the Fire Brigade by telephone on 000
- \* Instruct other employees and any members of the public to evacuate the area immediately by the safest path to the assembly area
- \* Use fire extinguishers and hose reels if safe to do so
- \* Gather your valuables without wasting time and immediately proceed to the assembly area
- \* Do not re-enter the building until advised to do so by the person in charge. eg. Fire Officer or Supervisor.
- \* Fire Wardens must check store rooms and toilets to ensure they are clear of personnel
- \* Fire Wardens are to count employees at the assembly area to reconcile numbers with the attendance book.



## CHAPTER THREE

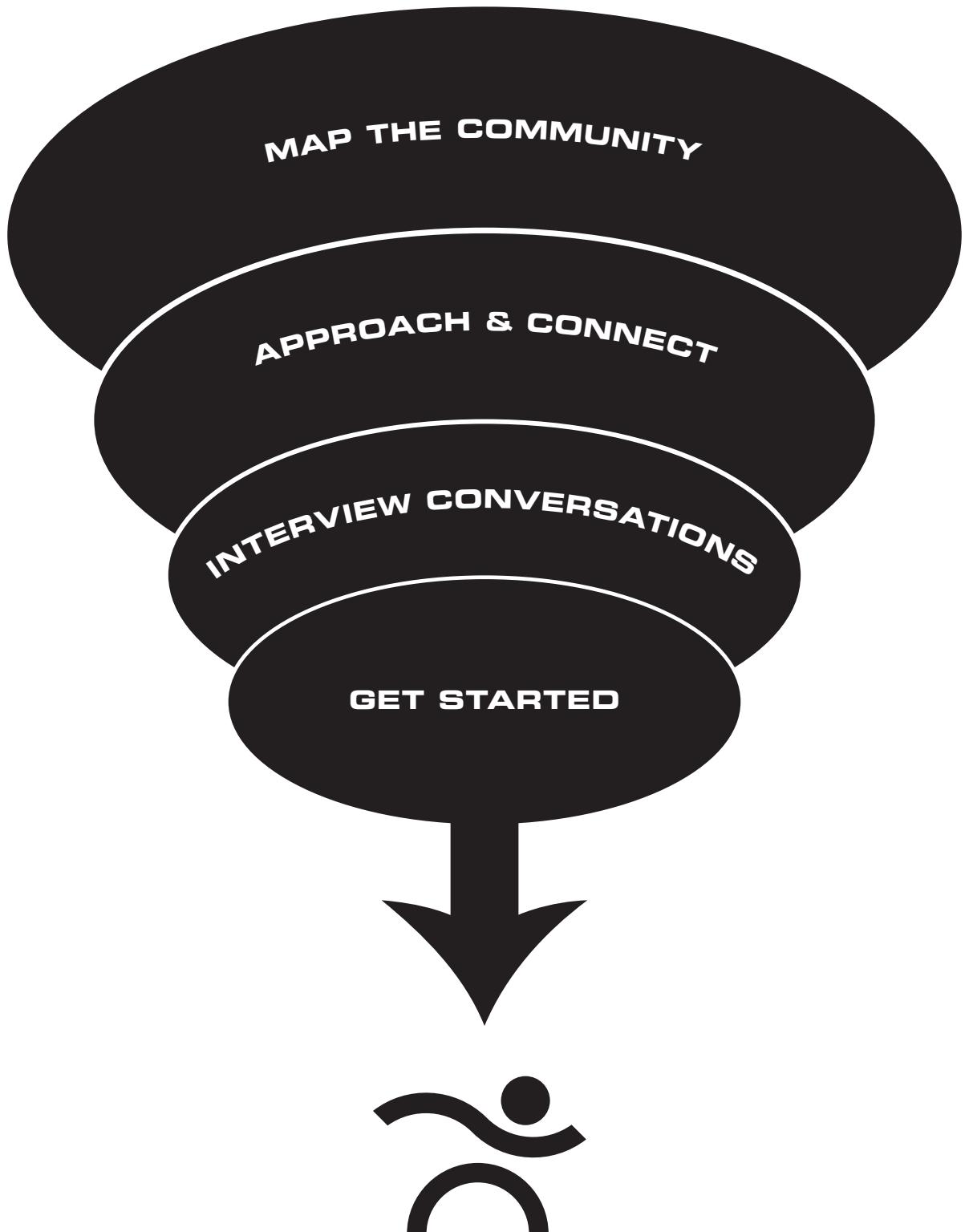


WHO WANTS TO BE A VOLUNTEER?





## Model for engaging and connecting the community and your program



This model suggests a channelling process for volunteers from identification to induction. At each stage there is an expected self-selection process on the part of volunteers as they are able to refine their understanding of their volunteering expectations and needs.



3.2

## Mapping your community

Whether you are starting a new volunteer program or building upon an existing volunteer program you may have identified your local community as a source for recruiting volunteers. Effectively involving community members in your volunteer program relies on knowing who your community is, the capacities of community members and what they feel they are able to contribute.

Community support can come in a range of forms. When you are considering recruiting volunteers from the local community, remember, it is not only about encouraging volunteering with your organisation, it is also about negotiating relationships with community members and building connections with the community.

As highlighted in Chapter 1.4 there are a number of trends impacting on the needs and expectations of community members. When volunteers are described as ‘types’ they are actually being classified into different sets of needs and expectations. Finding the right people for your volunteer program does not necessarily mean trying to attract a particular ‘type’ of volunteer. By developing a realistic view of your community and identifying who may be ‘Willing & Able’, you can widen the pool of potential volunteers and increase your recruitment options.

Mapping your community is one way to strategically consider a wider range of recruitment options and ways to engage and connect with potential volunteers.

### Planning for community involvement

The following process may assist you to identify existing and new areas from which to recruit for your volunteer program. The process may also help you identify ways to tap into new pools of potential volunteers.

You may wish to undertake each of the topics as an exercise using an approach similar to those outlined in *Exercise: Who is a Volunteer? (Chapter 1:6)*

#### 1. Map your community

Consider all the activities your organisation has undertaken in the past year. List all the individuals, groups or organisations your museum came into contact with as a result of these activities.

The following questions may help you compile a list of people, groups and organisations you came into contact with over the past year:

- *What people, groups or organisations have visited your museum?*
- *What people, groups or organisations have used the museum's resources or facilities?*
- *Which people, groups or organisations has your museum assisted in the past?*
- *Who has contact with your organisation (in ways other than through your services/activities)?*
- *Which people, groups or organisations are affected by the success or failure of your organisation's activities?*
- *How did your current volunteers become involved in your organisation?*

#### 2. Explore the current relationship

After you have compiled a list of names consider how your relationship began, developed and/or dissolved.

It may be useful to ask the following questions:

- *What is your current relationship with each of the people, groups or organisations identified?*
- *What might each need from your organisation?*
- *What does your organisation need from them?*
- *What other influences impact on your relationship with each person, group or organisation?*

#### 3. Consider the public's perception of your organisation

The development and maintenance of a strong public profile that accurately reflects who you are and what you do, can seem daunting and resource intensive.

Consider how your public image may be presented and interpreted by the people, groups or organisations you have come into contact with or who you may potentially want to approach.

- *What impression of your organisation are they likely to have?*
- *How could their perceptions impact or influence your volunteer program?*

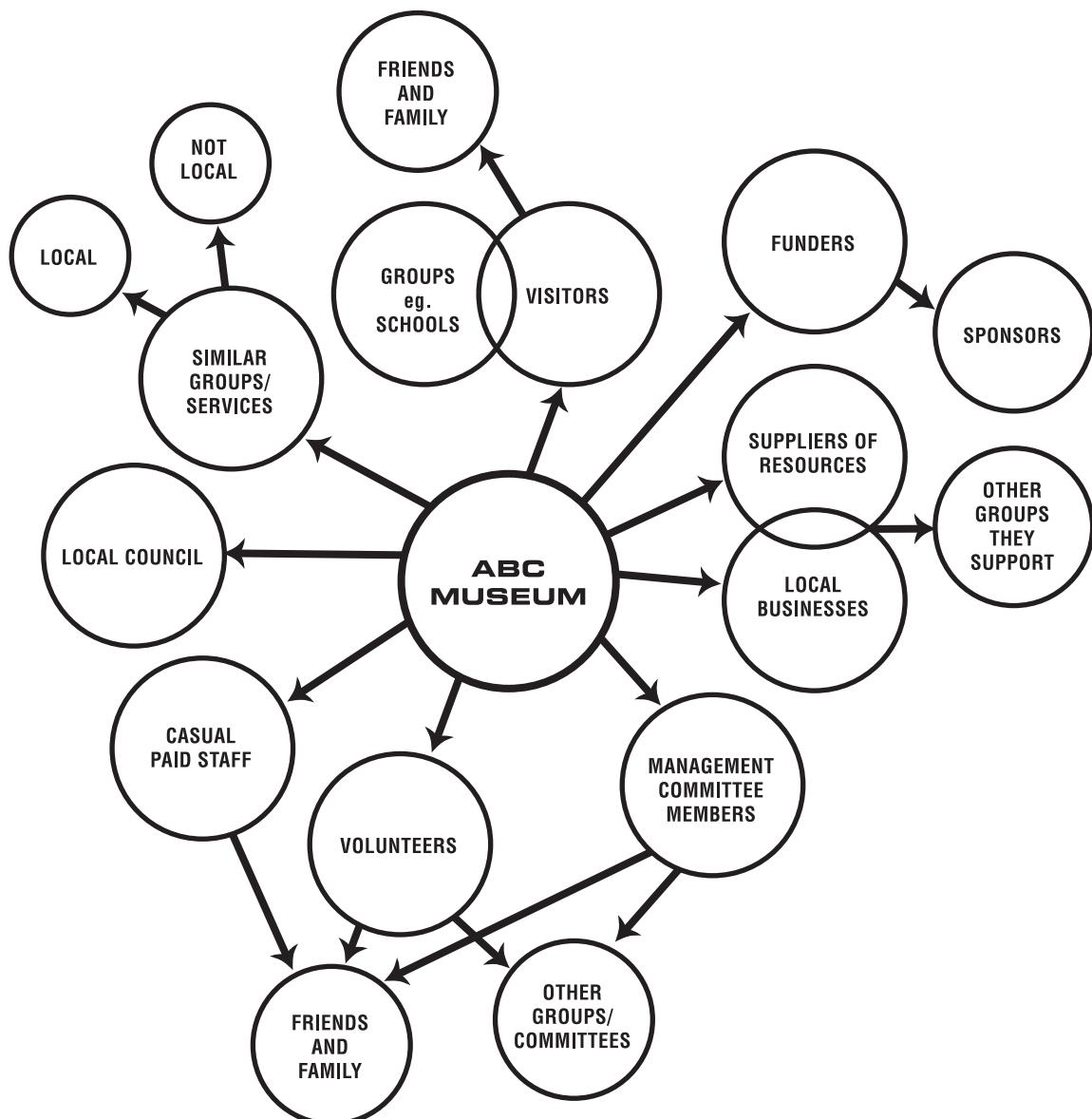
#### 4. Make your approach

Now consider the following questions in relation to each person, group or organisation identified on the list you compiled in Step 1.

- Would groups you have a relationship with be interested in offering something else?
- What could they offer that they are not already offering?
- How could you approach each person, group or organisation to determine if they could contribute more?
- How would you negotiate ways and means for them to contribute?

#### How does mapping your community work?

The diagram below is an example of how to record your responses to the questions listed above. The example illustrates how the ABC Museum has mapped the people, groups and organisations it has come into contact with.





3.3

## Making the connection

Through the process of mapping your community, you will have identified a range of potential individuals, groups and organisations, and ways in which they could become involved in your organisation. The next step in the process is considering what type of approach would be most appropriate.

### **Develop an effective communication strategy**

Before approaching potential volunteers you need to be clear about:

- (1) What you need to tell them,
- (2) What you want to request, and
- (3) What type of communication will be most effective.

It is essential that you tailor your message to each individual, group or organisation you intend to target. Taking time to develop a strategy that suits them demonstrates your interest in them and commitment to developing a relationship.

An effective communication strategy contains the following aspects and points:

#### **Identification of the role your organisation plays in your community.**

By describing how your organisation and its volunteers make a difference to your community you could attract people who want to make a difference and be involved in something meaningful.

#### **Describe and/or list all the volunteer job/s you require or are available to volunteers.**

Potential volunteers need to know what they will be required to do — including time frames and level of commitment along with some examples of specific tasks. It is critical to be honest in saying exactly what you want. Volunteers who expect to work in public relations but discover the work is actually sending out letters will soon leave discouraged.

#### **What levels of skills, interest and knowledge are required for specific jobs?**

Let people know if certain jobs require specific skills and experience. Being upfront about specific job requirements will save you and potential volunteers valuable time. Acknowledging job requirements ensures you will not invest time in

volunteers who are not appropriately qualified and will discourage unsuitable applicants from applying.

#### **Focus on overcoming the concerns potential volunteers might have about the work.**

Some people would like to volunteer but are concerned they will not be able to meet the requirements or expectations. Make sure your communication material addresses (and does not dismiss) these potential concerns. It is useful to reassure people that training and/or support is available. You could mention that training is provided, volunteers will not be asked to do things they are not comfortable with, volunteers work in teams and/or knowledge of all your organisation's activities or programs not a pre-requisite.

#### **Highlight the benefits of the volunteer's role.**

It is important that people are able to see volunteering as an opportunity. Understanding the benefits associated with their role is a key part of this. The benefits may be practical and tangible, such as training, or a certificate of appreciation. They may also be broader or intangible such as making a difference, and maintaining the community's heritage.

### **Decide on the type of approach**

Traditional recruitment has often used broad-based campaigns to broadcast the need for volunteers throughout the community. The problem with this approach is that it is so generic nobody thinks you are talking to them and they remained unengaged.

For many people, groups and organisations, the key to building a positive relationship begins with your initial approach. By taking the time to target your approach – utilising the community mapping exercise to examine the characteristics, requirements and preferences unique to various groups – you are conveying commitment and interest in the potential volunteers.

You may still find that some groups require a more general communication approach. Consider the following communication networks and techniques through which you could broadcast your message:

- Volunteering Queensland
- Local community networks eg. schools, work groups, family and friends



- advertising through local newsletters and community newspapers
- local letter box drops
- including a recruitment message on your envelopes for mail-outs
- display booths
- posters around town
- networking with other programs



#### ABOUT RECRUITMENT

- The most effective method of recruitment is word of mouth from current volunteers.
- No-one volunteers unless they are asked.
- It is far more effective to retain a satisfied volunteer than to recruit a new one.
- One volunteer, who leaves after a poor experience within your museum, will do more damage than the good done by ten excellent recruitment campaigns.

### *Volunteering in action — museum stories*

#### **Recruitment**

Recruitment of volunteers has traditionally been a difficult area for most volunteer organisations.

Global Arts Link (GAL) employs several approaches to recruiting, none of which involve expensive media advertising. We produce a volunteer brochure which features a volunteer application form. These brochures are promoted by our volunteers and therefore have become an on-going recruitment tool.

Our website is another way of recruiting and we now have a link to Volunteering Qld to promote GAL even further. Through our connections with other community organisations we promote volunteering at GAL and, in the future, our volunteers will undertake training in public speaking so they will be able to speak at various community organisations to promote GAL. In addition, GAL volunteers have business cards which feature GAL volunteer information.

Traditional recruitment processes — advertising and running training every three months was — most frustrating as we would no sooner be finished the training than we would be approached by someone new wanting to start. We would take their information and advise that we would ring them in time for the next program. The sad fact was that by the time the program came around again, they had gone elsewhere. We were losing valuable people. We needed a way to bring people on board as soon as possible after their initial enquiry. Our Mentor Program now allows us to do just that. (See Chapter 4 for more details on the Mentor Program.)

**— Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council**

## **Organising an Open Night/Information Night for prospective volunteers**

Information nights or open nights can be a very productive way to reach potential volunteers, but they do require thoughtful organisation. Here are some suggestions:

### **Open Night Promotion**

- Prepare for an 'Open Night'. First ask staff about suitable dates because they will have to be there. Make a brochure and posters; include guest speakers, a special behind-the-scenes tour, and an opportunity to meet the staff.
- Include on the brochure a volunteer application form for names and contact details and ask them to mail this back to you.
- Use this information to start your data base.
- Advertise widely, announce the night officially via a media release, putting up posters, radio and newspaper interviews.
- Approach similar organisations in the community to tell them about the program and address their volunteers.

### **On The Night**

- Use the data base to print name tags.
- As people come through the door issue name tags or write new ones, give everyone a brochure with the application form and ask them to write out their names and contact details. Ask them what their interest is in volunteering and direct them to the staff member with whom they will most likely be working.
- Give a presentation explaining what the volunteer duties will be and introduce staff working in different areas.
- Charging a fee to join the program encourages commitment on both sides. The fee must be more than nominal and volunteers can take pay immediately or over as much time as they need. The fee should not deter people from joining the program. During your presentation, tell people about the fee.
- When everyone has gone, ask staff about the people they met, strengths and weaknesses and how they might help in their areas.

— **Deborah Cavanagh, Consultant Environmental Education and Tourism, Tropical North Eastern Australia**





### **Exercise: Making your approach**

Directions: Bring together a group which is representative of your local community to consider all the different ways you could promote your volunteering opportunities. Once you have decided on what message you need to convey and the most suitable approach to take, start making the links.



**3.4**

## Interview conversations

Satisfying both the needs of the potential volunteer and the organisation is a key focus of the *Willing & Able* approach. Developing and maintaining a successful partnership with volunteers can be assisted through the accurate matching of roles and work environment with volunteers. It is critical that the needs of potential volunteers are clearly identified and matched with the needs of the organisation.

The matching process begins with your initial discussions with potential volunteers. These discussions are a good way to start identifying a potential volunteer's needs and motivations. They also need to address the issues and information consistent with an actual job interview without interrogating potential volunteers.

The interview should enable both you and the potential volunteer to feel like you are having a conversation whilst still allowing you to structure the discussion so you can discover and explore the following topics:

- their background, interests and motivations;
- their capacity and potential based on their skills, experience, knowledge and abilities, values and attitudes;
- the level of understanding they have about the organisation and the work;
- issues of concern to them;
- some insight into their work style and preferences; and
- clarifying their expectations.

The process of conducting an interview conversation covers four stages including: welcoming, asking, supplying and parting.

### Step 1: Welcoming

The first step of the interview is to ensure the potential volunteer feels comfortable and to build rapport. Do not proceed until the volunteer is comfortable. Some simple ways to put the potential volunteer at ease include:

- asking some general questions which show you are interested in them;
- selecting a comfortable and suitable environment free of interruptions;

- explaining the format of the interview; and
- encouraging the potential volunteer to ask questions throughout the conversation.

### Step 2: Asking

The second step of the interview is to gain information from the potential volunteer and give them a chance to tell you about their interests and their story. Traditional interviews tend to focus on skills, knowledge and abilities through a series of questions about work style. While this may be suitable for larger or more formal organisations, in smaller, informal settings, this can alienate potential volunteers.

Asking questions prior to providing information is a useful way to keep the interview focused on the individuals. If you present a lot of information to the potential volunteer before they have an opportunity to present their own information they might find it easier to reiterate what you have already said rather than provide responses from their own experiences.

The following questions should provide you with information required to:

- provide work that connects with the volunteer's motivation;
- utilise some of their current talents;
- provide meaningful development opportunities by matching their volunteer work to at least one of their interests;
- acknowledge what they don't want to do and either avoid giving them such assignment, or explain that while some 'unwanted' activities may be required, there will be other opportunities which compensate for this;
- ensure any special needs are addressed.

#### **What is your reason for wanting to volunteer?**

Understanding the reasons a person wants to volunteer in your organisation will help clarify their motivation and identify appropriate activity matches. Other useful questions include:

- *Why are you interested in volunteering?*
- *What attracted you to our organisation?*
- *How did you find out about volunteer opportunities in our organisation?*

*Volunteering in action — museum stories*

### **Identifying new volunteer opportunities**

#### **GAL's Junior Volunteer Program**

GAL has recently introduced a Junior Volunteer Program. After researching the most appropriate way to utilise juniors to their best advantage, it was identified that they usually work best with younger people in a more static environment.

We also wanted to ensure that the juniors were not taking positions filled by regular volunteers more familiar with the constant changing exhibitions in the gallery. However, we did identify that when school holidays came along, volunteers who had school children and the volunteer grandparents who babysat their grandchildren, went out the door whilst the visitors teemed in (especially if there were holiday workshop activities).

We feel we have identified the most appropriate role for junior volunteers at GAL and that is to assist an arts facilitator with young primary school children engaged in art and craft activities during the holidays.

Next we identified an on-going pool of willing young people who would also benefit from such a partnership. The Guides and Scouts Associations need cultural areas for their young people to be able to earn their various badges and levels AND these young people are available during school holidays.

GAL has now set up a very positive three way partnership with the Guides Association and Scouts Australia in our region to engage young people of high school age in on-going holiday workshop activities at GAL. The program will become operational in September.

**— Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council**

*Volunteering in action — museum stories*

### **Volunteers with special needs**

Here at the Cobb & Co. Museum we take each volunteer application and assess individual needs and the ability of the organisation to provide adequate support, supervision and training.

So far our volunteers have included people with a range of special needs. For example, one volunteer suffers from severe arthritis, so we limit the time he spends standing up and provide seating. Another volunteer is profoundly deaf but able to read lips and he has no problem dealing with the public. He is rostered on with his wife to provide support.

A volunteer with schizophrenia is stable under medication. Staff are aware of her condition and don't get too flustered around her. We have a volunteer with a physical limp and walking stick, so we have provided seating and limited walking. A young stroke victim with mental and physical limitations is given specific tasks to her level of ability.

A new addition to our volunteer force is a young woman with multiple sclerosis (MS). She is supervised and buddied with another volunteer at all times and staff are aware of her physical limitations. We have had some comments about her speech slurring and we deal with that.

I think the most important thing is understanding the level of supervision that will be required of staff. One suggestion is to buddy up people with special needs with another volunteer to help them.

**— Elizabeth O'Brien, Marketing Officer, Cobb & Co Museum**

*(Extract from article Museum National, August 2002, reprinted with permission of author and Museum National)*

### **What are the things you like to do and can do fairly well?**

This question enables you to explore the current skills, knowledge, interests and potential of the volunteer.

Other useful questions include:

- How could you contribute to the organisation?
- What do you have to offer the organisation?
- Describe the type of work you have been involved in previously.
- What skills and experience could you bring to the organisation?
- What type of volunteer experience have you had?

### **What are the things you would like to do or have an interest in learning?**

If you only focus on current skills and abilities you can overlook the enthusiasm and commitment volunteers have to learn new skills. If you wish to focus on capacity and potential, this question is critical. Other useful questions include:

- What types of things do you enjoy doing most?
- What qualifications or specific skills do you have an interest in obtaining?
- If you were successful in gaining a volunteer position with us, what would you like to do?
- How could you contribute most effectively to assist the organisation achieve its mission?

### **What are the things you do not want to do and are off-limits?**

Identifying what volunteers dislike and don't want to do may feel too awkward to raise but is valuable in ensuring the volunteer is appropriately matched to a role. Other useful questions include:

- What have you enjoyed least about your previous volunteer/work roles?
- What were the major challenges of your previous volunteer experiences?
- What areas within the organisation do not interest you and why?
- Volunteers are not expected to do every type of work within the program. What are you not comfortable with or not interested in doing?

### **Do you have any special needs or requirements in doing this work?**

This is an important question in determining whether the volunteer requires additional support. It is important that any questions regarding this topic focus only on requirements that relate to the specific volunteer job.

## **Step 3: Supplying**

During this step of the interview you can provide the potential volunteer with information in relation to the following topics:

- Philosophy of the organisation
- Information about its services, programs or projects
- Expectations of volunteers
- Types of voluntary roles available
- Benefits of volunteering
- Education and training opportunities
- Paid and volunteer staff relations

It is important to keep encouraging the potential volunteer to ask questions about any aspect of the organisation, program or work.

## **Step 4: Parting**

The final stage of the interview is to ensure that both the individual volunteer and the person representing your organisation have had the opportunity to gather information and address any questions. At this time you need to summarise any decisions that have been reached and inform the potential volunteer of what will happen next, for example, a reference check or setting an orientation date. The end of the interview also provides an opportunity to thank the potential volunteer for their time.

### **Tips for effective Interviewing**

- Go through all the volunteer application forms, update the data base and contact everyone who has applied to attend an interview.
- Always have a staff member who will be working with volunteers on the interview panel as well as the volunteer coordinator and a representative from the volunteer committee (if the program is already established).
- Have a list of basic questions and ask everyone the same set of questions.
- Record the answers for later reference. Ask everyone on the interview panel to keep notes. This allows staff to get a feel for the field, meet people with specific skills. It's not unusual to meet people in volunteer interviews who are ideal for existing, vacant staff positions.
- Information collected at these interviews will assist in organising the content for the training program.
- We always charge a fee for people joining our volunteer programs. It helps defray costs but, more importantly, tends to keep people who are serious about attending. Paying the fee must be manageable and must not prevent people from joining the program. During the interview discuss the fee and stress that folks can take as long as they like to make the repayments, we don't want the fee to put people off.
- I don't think we have ever rejected someone who has applied to be a volunteer. In the case of difficult people, we discuss how we can fit them into the organisation and keep an eye on their progress. People who aren't well suited to the organisation usually select themselves out when they learn about the level of commitment expected from the volunteers.
- Enter information regarding personal interests, hobbies etc on the data base.
- Once all the interviews are complete and the interview panel has agreed on the successful applicants, write a letter confirming their appointment and notifying them of the course schedule.

— **Deborah Cavanagh, Consultant Environmental Education and Tourism, Tropical North Eastern Australia**



- ✓ Make sure you allocate an appropriate amount of time to the interview conversation.
- ✓ Read the potential volunteers' application prior to the interview.
- ✓ Find a comfortable place free of interruptions for your conversation.
- ✓ Provide information about the organisation.
- ✓ Clearly and honestly define the requirements, expectations and benefits of the volunteer position/s.
- ✓ Treat potential volunteers with respect and assess their capacity on an individual and objective basis.
- ✓ When asking questions of the potential volunteer, always try to ask open-ended questions that encourage them to provide information. Open ended questions usually start with what, how, where, when, why or who.
- ✓ Remember the 70/30 rule. The potential volunteer should do seventy percent of the talking during the interview.
- ✓ Listen to what the potential volunteer is saying and what they are not saying.
- ✓ Explore what the potential volunteer would like to contribute to the organisation.
- ✓ Encourage the potential volunteer to discuss their experiences.



## **Exercise: Interview conversations**

Directions: As a group practice initiating and maintaining 'interview conversations'. If you like you can split into pairs and take turns practicing as the volunteer and the interviewer.

**Interviewer:** During your conversation make sure you discuss and find out how the volunteer likes to spend their free time. Consider how their relationship with the volunteer program will fit into their life.

Give an example of a typical volunteer program/activity. Discuss procedures, times required, and the role of the volunteer or the type of work required.



3.5

## Getting started

A final step to connect and integrate the volunteer into your volunteer program includes confirming with the volunteers their roles and relationships with the museum. This step is undertaken to ensure the volunteer has received adequate information and is comfortable about their involvement.

### The Role

In Chapter 2.2 the development of job descriptions was discussed in relation to developing a volunteer plan. It is possible that as a result of your interview with a potential volunteer you may negotiate a different form of involvement for the individual. If so, it is important to revisit the job description and confirm that both you and the applicant understand their role before they start.

Part of this confirmation may also include checking that the work is meaningful to the volunteer. In order for the role to be meaningful, it could:

- be in an area of responsibility that is purposeful and results-based; and/or
- include defined boundaries that create a sense of ownership and scope that enables freedom, choice, and decision-making.

### The Relationship

Another key component of a volunteer's involvement is the relationship they share with people, work and the volunteer program. The sense of sharing and mutual benefit within the volunteer program can be a key factor in the continuing motivation of volunteers.

Discussions that clarify and negotiate the expectations of all parties are useful in setting the tone for ongoing involvement. Written information may also be provided for this purpose.

### The Transition

Consider how the volunteer may feel in each of these scenarios. Then compare your response with the suggested response listed below.

#### **Scenario 1:**

Imagine it is a volunteer's first day. They arrive in the morning and are greeted by the volunteer coordinator who interviewed them. They are introduced to the

desk, the phone, and the key tasks they will be working with on that day. The coordinator then gives a brief introduction to only one simple task and then returns to her own work.

*In many cases, volunteers in this example are likely to feel isolated, undervalued, unsure and disconnected. As a consequence their work is also likely to be affected.*

#### **Scenario 2:**

Imagine a volunteer is involved in a group orientation session. This session gets them acquainted with the organisation generally, its history, key aims and ideals. During the orientation they also meet the people with whom they will have direct and indirect contact during the course of their volunteer work.

*In this example there is an opportunity to create a different experience for the volunteer. An experience in which their first day is comfortable, exciting, interesting, rewarding and makes them feel connected.*

As the second scenario demonstrates, orientation programs are valuable and serve a number of different functions including:

- making a positive impression on volunteers by making them feel welcome;
- demonstrating your organisation values volunteers by investing time and information in the partnership;
- providing information that will support effectiveness and ensure an understanding of ways of working;
- creating a sense of belonging that increases the volunteers' level of comfort in the program and organisation. This may also reduce volunteers feeling uncertain in the new environment; and
- developing a sense of teamwork and an understanding of the organisational culture by providing an opportunity for volunteers to become familiar with the people, program and the organisation.

## **Orientation**

An orientation program can be formal or informal and can take place in a group or individually.

You may choose to conduct an orientation as a formal training session with a large number of participants; as a tour with an individual; or any number of innovative options.

How you choose to conduct your orientation is likely to depend on a number of factors:

- the size of the program
- the nature of the program
- the roles and responsibilities of volunteers
- methods of recruitment and commencement times of volunteers
- availability of volunteers and staff
- what you want to achieve in your orientation
- amount and level of information required (prior to commencement and on an ongoing basis)

## **What to include**

Regardless of how you choose to involve people in an orientation program, the following key questions will need to be answered:

### **(WHY?) Orientation to the Cause:**

The reason/s why the organisation exists and what the organisation and the volunteer program aim to achieve. What are the organisation and the volunteer program's purpose, ideals, aims and history? It might also be worthwhile to place these answers in the broader context.

### **(HOW?) Orientation to the System:**

What are the channels of communication and reporting? How do they work? What guidelines, policies, structure, funding sources, and rules apply and when do they apply?

### **(WHO?) Orientation to the People:**

What relationships either direct or indirect exist. Explain how tasks and roles are related.

### **(WORKING TOGETHER?...OR NOT?)**

#### **Orientation to the Culture:**

These are the intangibles that volunteers will become aware of along the way including – what is an appropriate form of dress; what type of behaviour, language, social interaction is accepted.

#### **(WHAT?) Orientation to the Work:**

The scope and boundaries of the volunteer's work: the roles, modes of work, job descriptions.



## CHAPTER FOUR

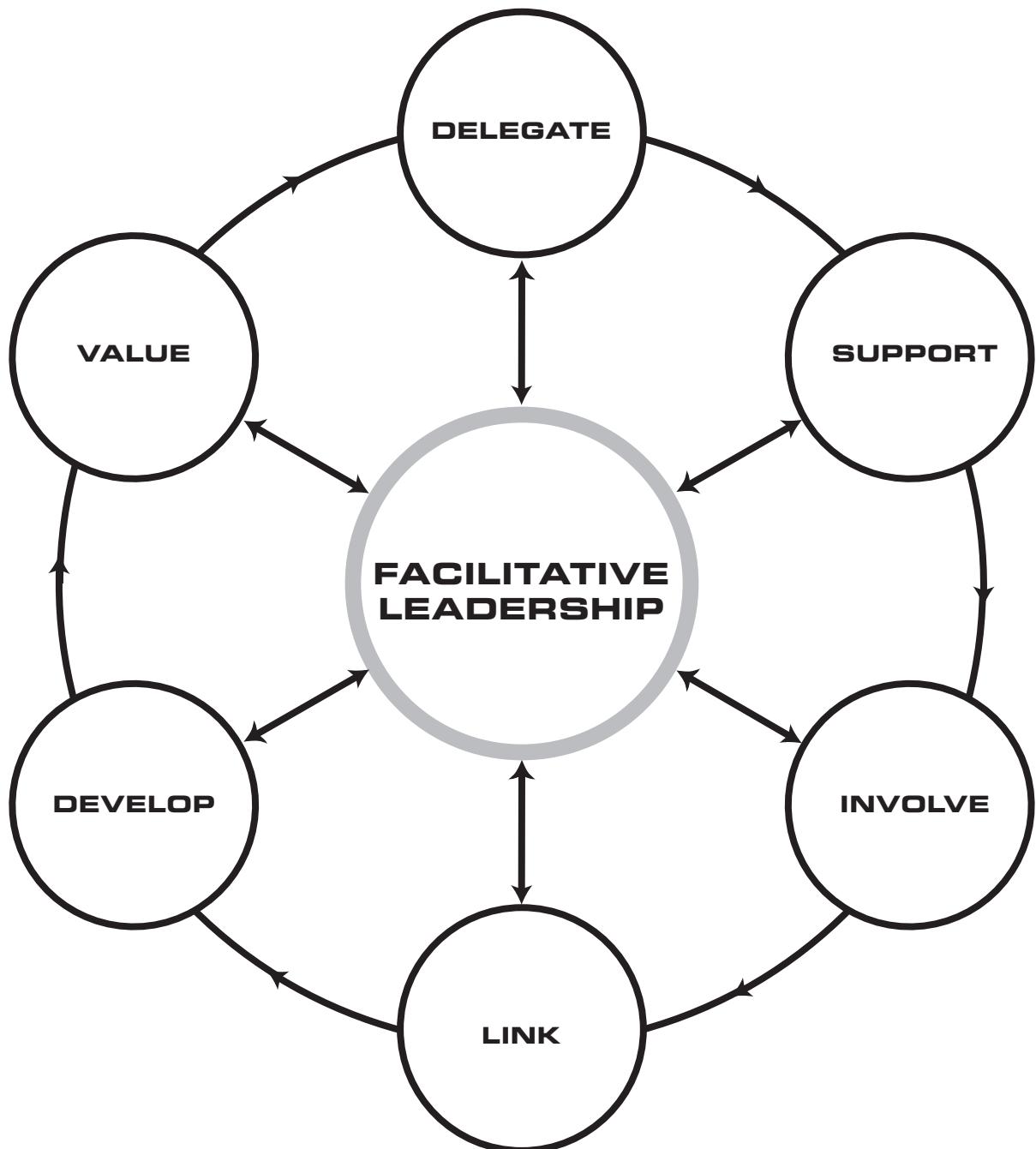


MAKING IT WORK





## Model for facilitative leadership: make it work



The model represented here has been included to indicate the content structure of this chapter.



4.2

## Being a facilitative leader

### What do leaders do?

Traditional forms of leadership are often directive, providing little choice or opportunity for volunteers or other staff to provide input into the museum. The leadership model used in the *Willing & Able* approach focuses on facilitative leadership.

Facilitative leadership has been identified as a far more effective way of working with people in a range of non-profit organisations and community settings, as it is not just about giving directions. Facilitative leadership aims to create an environment that encourages work and responsibility, opportunities to monitor action and process and to provide need-based support, education and guidance, in consultation and negotiation with volunteers and other staff.

In this model, leaders of volunteer programs act as both facilitator and coach. Their primary responsibility is to 'make it work' in part by facilitating the development and maintenance of healthy staff relationships.

Their role in relation to establishing and maintaining a volunteer program can include identifying the current abilities and capacities of volunteers and supporting volunteers in their efforts to grow into and/or adapt a role. Whether working directly or indirectly with volunteers, they also aim to ensure that someone is available to and accountable for, the volunteers.

One of the benefits facilitative leadership offers to volunteers is increased opportunity for decision-making and leadership in their own roles. Under this model, volunteers are encouraged to assume higher levels of involvement and contribute to the direction and operation of the museum. Creating these opportunities can encourage volunteers to develop a greater sense of ownership and connection with the museum.

As the structures of organisations vary, so do the forms of leadership within them. In considering your own museum you may find leadership exists in the form of:

- paid volunteer coordinators;
- voluntary volunteer coordinators;
- managers of volunteer services;
- team leaders;

- develop appropriate planning processes in line with the museum's requirements
- other identified people who take responsibility for different areas or forms of work.



#### HEALTHY LEADERSHIP

Leadership is a significant responsibility. Many of the issues raised in relation to volunteers also apply to those in leadership roles. It can be difficult for leaders to develop, support and value volunteers, and other staff, if they themselves do not feel valued, supported and have opportunities to develop. It can be useful for leaders to use their own initiative and apply the principles of healthy and effective relationships and programs to their own involvement.

### Leadership responsibilities

Consider the following list of possible duties and responsibilities for leaders of volunteer programs:

- develop appropriate planning processes in line with organisational requirements
- develop and maintain policy and procedures in relation to volunteer involvement
- develop and maintain records relating to the volunteers' activities
- develop and administer budgets for volunteer programs in consultation with others
- recruit volunteers
- select, match and refer incoming volunteers
- facilitate communication about issues relating to volunteers
- manage the induction process for volunteers
- Identify and facilitate training and other development opportunities
- provide assistance, support and feedback to volunteers
- provide support to other leaders
- provide formal and informal recognition to volunteers (and other leaders)
- evaluate the outcomes and benefits of volunteer involvement
- support and monitor changes across volunteer programs

### **The Volunteer Coordinator**

One of the most important appointments to be made is that of the volunteer coordinator. Some practical advice:

- Create a dedicated volunteer coordinator position because without this position the program may be added to existing staff's responsibilities, leaving the program under-resourced.
- The Volunteer Coordinator can be a part time job. It is essential the sole duties are coordination of the volunteer program. Assigning volunteer coordinator duties to an existing position creates confusion, overloads the staff member and eventually alienates the volunteers. If a staff member wants to coordinate the volunteers, ask the CEO to invite them to apply for the job. If they are successful, make sure their original position is back filled.
- If you have 10 or more volunteers you will need someone to coordinate their activities. For less than 10 volunteers, the program can be much less formal.
- A volunteer coordinator must be well organised, have highly developed interpersonal and management skills, be a good communicator and be enthusiastic about working with volunteers.
- Since the coordinator is responsible for the smooth operation of a program providing many additional working hours as well as important community connections and public relations, the job must be paid accordingly.

— **Deborah Cavanagh, Consultant Environmental Education and Tourism, Tropical North Eastern Australia**



### **Exercise: Leadership responsibilities**

Directions: You will need paper and pens to record your responses.

Take the list of leadership responsibilities and, as a group, consider and discuss how a leader in your organisation would manage and monitor the above list of responsibilities for a volunteer program.





## 4.3 Delegation

A pivotal component in making a volunteer program work is the delegation of work to volunteers. Delegation can be seen as simply the giving of instructions, the allocating of work, and telling volunteers what to do and how to do it. The *Willing & Able* approach to working with volunteers emphasises delegation of responsibility rather than delegating tasks. Delegating responsibility means that the volunteer becomes responsible for both the work and the outcomes of that work.

Delegation of responsibility can

- create an increased sense of ownership
- create more decision-making opportunities
- encourage initiative
- further define accountability for volunteers.

### Delegation Of Responsibility

This approach recognises that volunteers come with their own skills and knowledge, but also their own experiences, life perspectives, needs and expectations. This approach also provides points of reference, as listed below, to be used by both leaders and volunteers in negotiating through the delegation process.

**Results:** Explain or show volunteers what results are expected from their work. State ‘what’ is wanted or needed rather than ‘how’ it is to be done. Describe what outcomes you expect from their work. Describe the signs that would indicate that they are on the right track and that they have been successful. What performance standards are required?

You might find that the results you require overlap or are drawn from the aims of the program, but wherever possible ensure that what you have described is directly related to their work.

**Guidelines:** Communicate to volunteers any boundaries, limits or guiding influences that will affect how their work is done. What policies or additional information might have an impact on how their work proceeds? Identify what the ‘no-no’s’ are and how potential problems can be avoided.

**Resources:** Ensure that the appropriate resources are available to meet the needs of the work. What human, financial or technical resources are required to ensure the work is completed to a satisfactory degree?

**Accountability:** Explain the process for reporting and further communication. Identify at what stages you will ‘check-in’. How will that occur? How will performance be measured: standards, indicators, observation? How will you know when success has been achieved?

**Consequences:** Identify what the by-products of satisfactory and unsatisfactory work are. Explain how either results would effect and impact on the organisation. Identify whether there would be any personal consequences for the volunteer. Consider how these consequences could affect both the organisation and the volunteer in terms of the tangible and intangible, the physical, the financial, and the morale of others?

### Follow-up

Once work has been delegated, you may need to follow-up with individuals about their work. If the work was successfully completed, ensure that this is acknowledged (see Chapter 4.7 ‘Valuing’). Maybe there were some aspects that could be improved or developed. Provide feedback that acknowledges what could be improved or developed. Reflect on what happened and see if there was something missing from the delegation process. Consider whether the match of the individual to the work wasn’t quite right in the first place.

To effectively complete a job volunteers need:

- adequate skills and knowledge;
- willingness and motivation to do that work; and
- an environment that supports (or at least doesn’t impede) their work.

Are any of these points missing? Perhaps further negotiation and feedback is required between you and the volunteer to enable them to complete the work (see Chapter 4.5 ‘Development’).



## TIP

The following are additional considerations that may also assist in delegation.

- Select the appropriate person to do the job.
- Select an appropriate person to do the delegating: someone with a clear understanding of the task or role.
- Recognise the volunteer's strengths and limitations.
- If necessary, make suggestions on how to start.
- Be proactive: demonstrate and give opportunities for practice wherever possible.
- Provide a context or explanation of 'why' this needs to be done.
- Provide written support material.
- Identify support that is available, particularly in relation to known pitfalls.
- Provide feedback, both positive and critical (see Chapter 4.5 'Development').
- Follow-up with people to ensure the work is completed.

## *Volunteering in action — museum stories*

### **Managing the process: Delegation, organisation, information provision and training**

#### *Delegation: Setting up as roster system*

It is a dream to have a volunteer program that is capable of operating for a period of six to eight weeks without a Coordinator. At Global Arts Link (GAL) our roster system is covers three to four months with all volunteers advised well in advance of their shifts.

This type of organisation can occur if the right person takes on the role of 'Roster Clerk' and has a full understanding of the requirements of the role. The right person will have excellent interpersonal and communication skills which will ensure that people will respond to them positively.

Over a period of time I have discovered that people actually prefer to 'own' their own regular shifts. We have a procedure in place to ensure that they give early advice of any holidays etc so the roster clerk can take this into account in preparation of the advance rosters. It is also a good guide to when you 'close the books' to new recruits. If you have too many volunteers and can't accommodate them with regular shifts, you will find they become disinterested, de-motivated and consequently you may lose them.

Another good idea for ensuring that you have enough staff on hand at any given time is to have an 'on call' list. These are the people who are happy to be called on in an emergency. This is very helpful if someone calls in sick or you suddenly find you need extra staff. They are the ones who will fill any 'gaps' in the advance roster if someone is on holiday or ill. Regular checking to make sure that these people are still happy to be called at the last minute, reassures them that they are not being 'used'.

#### *Organisation: Let it happen without you*

Some Coordinators/Managers may feel threatened if their program can continue to operate well in their absence. Personally, I see this as a sign of the success of the program. In any program with the right volunteer Roster Clerk working two days per week, your program should be able to continue functioning for a considerable period of time without your input. Rather than feel threatened, take pride in your organisational skills and your volunteers' abilities and get on with further developing your program.

#### *Information provision: Keeping current*

Our procedure to ensure that all 'on call' and regular volunteer staff are up to date with the latest information is to make updated changes available on a daily basis. This is the 'What's Happening Book' (or 'The Bible' as it has been dubbed). This book needs to be checked prior to all shifts to ensure that they are well prepared before they start their shift.

#### *Training: Up-skilling your volunteers*

I'm sure most organisations have a problem with the slow response to training sessions. We should be aware of the demands volunteering (and our expectations) make on people's time. We must recognise that not everyone can turn up to every session — we need innovative training ideas to make vital information available to everyone but in different ways. Exhibition change-overs occur frequently.

At GAL, all our volunteers are encouraged to attend curatorial talks provided. Naturally this doesn't (and can't) happen. Curatorial talks are now video-taped and made available in 'the vollies' room' so that they can catch up with the latest exhibitions whilst having their tea or lunch breaks. The 'What's Happening Book' is supported by Information Updates and newsletters mailed out at regular intervals and minutes are provided of all volunteer meetings to ensure that everyone remains in the flow of information.

Even though we have training, meetings, curatorial talks, recognition events etc, it has become evident that sometimes volunteers can be working in the same place for up to three years and never actually meet one another. GAL now has one annual 'Major Training Day' per year. This is the day when volunteers ARE expected to turn up and it is a great opportunity for some team building, motivation, information sharing, special guest speakers, meeting your team mates and having some fun. It is now becoming an 'event' that our vollies look forward to with anticipation because it isn't 'just another training session'. It also usually produces far greater attendance.

— **Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council**



## Support

When delegating work to volunteers, it is important to consider what support they might require to complete and enjoy the work they undertake.

Effective support encourages a partnership approach, where volunteers feel they are an integral part of the organisation rather than simply resources to be used by the organisation.

Support may be provided in a variety of forms but it should be dependent on what is relevant to the individual/s requiring the support. Methods of support can be negotiated through ongoing consultation between volunteer program leaders and volunteers.

Support may be required for both personal and professional issues.

Regardless of what methods of support the organisation utilises, it is important to ensure all methods address the following principles:

### **Accessibility**

Support should be available at appropriate times, in appropriate places and in forms that volunteers can easily use.

### **Flexibility**

The support provided should accommodate the needs of the individual.

### **Appropriateness**

Support should be appropriate for the type of work the volunteer is undertaking.

### **Shared responsibility**

Support comes from a variety of sources. It can come from both within the organisation through staff and volunteers, but also from friends and relatives.

Support may be provided on an individual and/or group basis. Preferably there will be options for both within your volunteer program. This is to ensure your organisation accommodates the preferences of all volunteers.

## *Volunteering in action — museum stories*

### **Mentors**

The Mentor Program has proven to be very successful in setting and maintaining the level of professional service required of Global Arts Link (GAL) volunteers.

Every new recruit receives one-to-one training by an appropriate Mentor. This training is based on role modelling, displaying and reinforcing the standards set and expected of all GAL volunteers. The Mentor program provided us with an opportunity to utilise the skills of people who were already doing a professional job for GAL.

A Mentor Training Program and a self paced training package were developed allowing existing volunteers to take on the role of guiding new recruits through to a positive outcome.

Currently, if someone applies to become a volunteer at GAL, they have an interview within a fortnight of their application. If they are accepted initially, they are introduced to their Mentor almost immediately. If they are considered unsuitable for the work available at GAL, they are offered a referral to another agency which may better suit their needs.

The Mentor then takes the new recruit through their Workplace Health & Safety orientation and gets them started on the basics. New recruits can actually be rostered from day one but are always placed with an experienced volunteer who will support and advise them during their shifts. The Mentor monitors the recruit's progress throughout the program and when they are finished, the mentor checks the referees and provides a written report and recommendation to the Coordinator of Volunteers. The recruit then graduates and has the opportunity to participate in a wide variety of activities available to volunteers within the GAL volunteer program.

If for some reason a Mentor is not satisfied with the recruit's progress or if the referees do not support the application of the recruit, the Coordinator will discuss this with the recruit and offer some alternative areas of volunteering.

The outcome of this great Mentor Program is that we now have a streamlined process of training recruits, volunteers who are valued for their roles as Mentors and better trained and more professional new volunteers. This process also increases and reinforces the pride and standards of existing volunteers. I believe the secret is to be very honest about your expectations during the interview so that the new volunteer understands immediately the standard and commitment you require of them.

— **Marie Giess, Coordinator of Volunteers, Global Arts Link, Ipswich City Council**



The following are some suggestions for providing methods of support in your organisation:

<b>INDIVIDUAL</b>	<b>TEAM</b>
<ol style="list-style-type: none"><li>1. Mentoring</li><li>2. Buddy system</li><li>3. Open door policy</li><li>4. Personalised reward systems</li><li>5. Personal conversations</li><li>6. Personal de-briefing sessions</li><li>7. Shadowing (when a new or inexperienced volunteer follows or works with an experienced volunteer)</li></ol>	<ol style="list-style-type: none"><li>1. Team meetings</li><li>2. Team building activities</li><li>3. Training or workshops</li><li>4. Discussions with other volunteers</li><li>5. Newsletters</li><li>6. Reviewing what went wrong/right</li><li>7. Develop team leaders with appropriate leadership skills</li><li>8. Volunteer get-togethers</li><li>9. Group de-briefing</li></ol>

# Development

The ongoing development of volunteers plays an important part in ensuring their long-term involvement in your organisation and increased productivity in your volunteer program. Development includes formal and informal learning, feedback and monitoring and it also includes any activity through which volunteers can enhance their skills, knowledge and self-esteem.

Activities that develop the capacity of an individual volunteer or group of volunteers are required to ensure volunteers can successfully participate in your volunteer program and organisation. Sometimes development of volunteers is an ‘optional extra’. However, if volunteers are not achieving personal or professional growth they can become bored with their involvement in your volunteer program.

Methods for developing volunteers should be both relevant to the aims of your volunteer program and organisation, but also to the needs of the volunteers. In considering the various training and development opportunities available, it is important not to focus on one particular type but rather consider how formal and informal training and learning activities complement each other.

It is also important to remember that development becomes most beneficial when provided at a level relevant to the volunteer. If learning opportunities are too challenging (or lack support) then volunteers can be easily discouraged. If learning opportunities are too simple then volunteers can become quickly bored and less motivated. The information you have gathered from both your interview conversations and ongoing contact with volunteers can provide you with a good idea of their current abilities and capacities. This information can also be useful in assessing the appropriate level of development.

## Approaches to development

Activities that promote development are likely to be part of the ongoing management and support of volunteers. Including a discussion of development activities during your induction process could be useful.

It is also useful to consider how you determine what training or development is required. If you would like volunteers to commit to participating in training, it is useful to get their input and agreement about what training will be provided.

More formal processes for activities which could support development include:

- negotiating with volunteers about agreed development goals (either at the initial induction or at a later session)
- generating a development plan that identifies goals, standards and methods of evaluation (and the resources and support required)
- establishing a regular review process to discuss issues, expectations and opportunities

### *Volunteering in action — museum stories*

## Designing and implementing effective training programs

### *Developing the program*

- Work with staff to design the training program – key subjects, speakers, workplace health and safety, and so on.
- Wherever possible, include staff as lecturers and trainers.
- Write the training manual with staff input.

### *Implementing the training*

- The CEO/manager must announce the program to staff and show support for the person starting up the program (preferably an outside consultant working closely with the Volunteer Coordinator and staff who will be supervising volunteers).
- Make the process entirely transparent for staff. They must know all there is to know about the program, their expected involvement, how the program will affect them. Give the staff the opportunity to ask the CEO questions and air their feelings on the issue. All staff and clients must own, support and want the volunteer program to happen.
- Staff must be prepared to spend time in getting the program operating and the CEO must include this time in their work schedules.
- The volunteer coordinator holds meetings with staff to tailor the program to suit specific staff and organisational requirements.

— **Deborah Cavanagh, Consultant Environmental Education and Tourism, Tropical North Eastern Australia**



## **Learning opportunities**

The following are some common and useful learning opportunities:

- training courses and workshops
- seminars and conferences
- guest speakers
- reading material
- field trips
- demonstrations
- videos
- audio tapes
- exchanges/job swaps
- mentoring
- meetings
- information-sharing

## **The role of feedback**

Although feedback is a key component to development it is often avoided for fear of causing offence, however not providing feedback can create confusion.

There are two forms of feedback: general and issue-based. Both are important for the ongoing development of individual volunteers and the volunteer group or team. Feedback also builds trust and increases the level of comfort people feel within the volunteer program.

### **General feedback**

General feedback is an open process of review and discovery. It is used to explore strengths, weaknesses and areas for development without necessarily having a pre-determined outcome in mind.

### **Issue based feedback**

Occurs in response to an action, behaviour or incident. It has a clear outcome ie. to address an issue and create a new situation or set of circumstances.

### **The feedback process**

Issue-based feedback occurs in response to a specific action, behaviour or incident. It has a clear outcome, i.e., to address something specific and either reinforce or change behaviour.

The following three steps may be useful:

1. **Describe the issue:** What happened? When did it happen? Give specific and objective information. Ensure you get the facts straight before you begin.
2. **Explore the repercussions:** Why is this an issue? What were the natural consequences? What is the impact on the individual/s, group/s and/or community/ies?
3. **Identify alternative actions:** What would you prefer to happen in the future – short-term and long-term? Are there things that need to occur to ensure it does not happen again? Will there be follow-up to this feedback? If so, when?

Ensure the person receiving the feedback has an opportunity to comment or tell their view of the incident.

Feedback in all its forms is an essential element of any development and training program. If it is used appropriately it becomes a valuable learning tool and provides valuable learning experiences.

## **Monitor**

Monitoring involves keeping in touch with how volunteers are managing and developing within the organisation. Consider the interview conversation you had with the volunteer before they started. It covered a broad range of information about the individual volunteer. How do you know that the information provided is still relevant? If you work with a small number of volunteers it may be easy to monitor them and their development through conversations. If you are involved in larger volunteer programs you may need to consider a more formal monitoring system.

In a formal monitoring system the following elements may be useful to consider:

- job goals
- job performance
- client feedback
- personal goals
- organisational role
- work relationships
- satisfaction
- other staff feedback
- peer evaluation



## Involvement

Effective leaders go beyond delegation, support and development. They are also capable of engaging people in the organisation.

Effective leaders understand the importance of involving people and recognising their individual efforts.

Below is a list of approaches and strategies that aim to develop a sense of ownership and commitment in volunteers and could be useful when involving volunteers in your organisation and its activities.

### 1. Create an environment for involvement

- Provide a place that the volunteers feel is their own space, even if this is a drawer in the filing cabinet or a place to store their valuables.
- Develop a climate of trust and avoid being overly directive or critical.
- Develop effective systems, policies and procedures that assist people to do things without asking.
- Provide clear expectations and full information of what is required of volunteers in the volunteer program.
- Be flexible and recognise that volunteers have lives and commitments outside their voluntary work.

### 2. Work with potential, interests and strengths

- Focus on the capacity and potential of volunteers, not just current skills
- Find ways to involve volunteers in things they are passionate about.
- Try to create activities in which volunteers can be involved from the beginning right through to the end of the project.
- Assist people to do things they really want to do, but are not sure how to do.

### 3. Allow for autonomy and responsibility

- Focus on what needs to be achieved, but encourage volunteers to determine how they would like to go about it.
- Focus on supporting volunteers to undertake a role within the museum, rather than focus on tasks.
- Try and create work in which volunteers are involved in the beginning, middle and the end.
- Encourage, implement and reward fresh ideas provided by volunteers.

- Provide training and support to enable volunteers to take on more autonomous and responsible roles.
- Encourage volunteers to suggest solutions to problems, rather than just identify problems
- Provide opportunities for more senior volunteers to act as leaders, trainers and buddies.

### 4. Provide meaningful work and the chance to make a difference

- Focus on providing meaningful work, rather than on finding something to do.
- Explain how the work of the volunteer relates to the purpose and vision of the organisation.
- Talk about the 'why' of the job, and put it into context with other roles within the organisation.
- Look at how volunteer roles within the organisation contribute to community outcomes.

### 5. Allow volunteers a voice as well as input to decision-making

- Provide suggestion or solution books.
- Encourage volunteers to become involved in reviews.
- Ensure volunteer representation on all decision-making committees or working groups.
- Involve volunteers in planning and visioning meetings.

### 6. Value individuals and recognise their uniqueness

- Provide opportunities for volunteers to focus on their personal aims, goals and interests.
- Recognise the individual as well as the job.
- Record things of interest you know about each volunteer so you can personalise support.
- Be aware of circumstances outside of the organisation which may have an impact on the volunteer.

### 7. Provide choices and pathways

- Provide a set of 'career' pathways within your organisation that volunteers can follow and ensure you explain these to your volunteer staff.
- Ensure that you are open to negotiations about roles that volunteers can perform.

- Allow volunteers to do something different and give them the ability to change direction.

## **8. Role as coach**

- Act as a resource for volunteers, rather than just telling them what to do.
- Develop a communication style that encourages a conversational approach.
- Use open questions in conversations with volunteers rather than always providing the answer.



## Valuing

Valuing volunteers is an action, not just an attitude. It is the way we show volunteers their contribution to the museum is appreciated.

The value of your volunteers can be conveyed in a number of ways, both formal and informal. Formal strategies consist of planning activities to recognise the contributions of volunteers. Informal strategies are usually spontaneous acts of appreciation for the volunteer's contribution and can happen on a daily basis. Depending on whether you utilise group or individual strategies, you can also emphasise the value of individual volunteers or the team.

Consider some more creative approaches to recognition including:

- **Frequent Volunteer Points Scheme**

Under this scheme volunteers are rewarded points based upon the time they commit to the organisation each week. Once volunteers have accumulated a certain number of points they can use them towards a variety of rewards.

- **A 'Token' Recognition Program**

Volunteers are provided tokens each time they work. These tokens can then be exchanged for discounts on goods and services from businesses in the local area. This obviously requires partnerships to be established with local businesses and retailers.

- **Volunteers' Day**

Conduct a volunteer recognition day once a year where the paid staff from the organisation pamper the volunteers. The activities could include cooking a breakfast or a barbecue lunch' or serving volunteers tea and coffee.

- **Virtual Recognition**

Appoint a virtual volunteer to send e-cards via the internet to volunteers in recognition of their talents, skills and abilities.

INDIVIDUAL	GROUP
<ul style="list-style-type: none"><li>• Thank you note</li><li>• Certificate</li><li>• Birthday card</li><li>• Personalised mug</li><li>• Lotto ticket</li><li>• Greeting on arrival</li><li>• Positive comments about achievements</li><li>• Smiles</li><li>• Taking a personal interest</li><li>• Shouting a coffee or drink</li><li>• Medal</li><li>• Honour Board</li><li>• 'Volunteer of the Month' award</li><li>• Promotion</li><li>• Newsletter article</li><li>• Letter of appreciation</li><li>• Trophy</li><li>• Officially representing the organisation</li><li>• Having them present a training session</li><li>• Appointing them as mentors</li></ul>	<ul style="list-style-type: none"><li>• Morning/afternoon teas</li><li>• Lunches</li><li>• Involvement in decision-making</li><li>• Banner to celebrate accomplishment</li><li>• Informal chats with organisation's leader/s</li><li>• Recognition notice board</li><li>• Banquet</li><li>• Plaque</li><li>• Incentive system</li><li>• Training opportunities</li><li>• Uniform</li><li>• Newspaper article</li><li>• Providing effective equipment</li><li>• Team-building workshops</li></ul>



### **Exercise:**

Directions: You will need paper and pens to record your responses.

As a group, brainstorm some suggestions and strategies for informal and formal methods of recognising your volunteers.

Then review the list and consider:

- What can we accomplish?
- What would the volunteers really appreciate?
- How do we ensure recognition is fair?
- How do we ensure recognition is consistent?



While these types of approaches can be great fun and provide a real sense of value, the most important approach to valuing volunteers is the way you work with them and treat them.



4.8

## Linking

A key attribute of leaders is their ability to make linkages and maintain and create a sense of unity; that is, connecting people to the bigger picture, the goals of the organisation, and to each other. Without effective linking, volunteers can feel disconnected. They can lack a sense of direction and feel isolated.

The three key elements of linking are:

- clearly communicating essential information about the organisation and the volunteer program;
- developing information and communication systems that effectively support the volunteer program; and
- developing a team identity.

These three components provide the framework which ensures your program is cohesive.

### 1. Communicating a clear vision

It is often said that the key to effective leadership is communicating a vision that people can believe in. Volunteers give of their time for many reasons. However, underpinning many of these reasons is a desire to be engaged in something that is meaningful and makes a difference to their community.

The demands of professional work as well as make it easy to lose sight of why we do what we do, the big picture. Similarly, when you are working with volunteers it is often easier to focus on tasks, rather than linking volunteers to the vision and the big picture of the organisation's work.

Communicate the organisation's vision to volunteers by:

- explaining how their roles or tasks assist the organisation in achieving its goals and reason for being;
- Involving volunteers in the development of the organisation's vision; and
- explaining the vision in ways that people can understand.

### 2. Developing information and communication systems

Organisations need effective communication mechanisms to disperse information. Effective communication is very much two-way, with regular input coming from the volunteers to the museum and vice versa.

Characteristics of effective communication may include:

**Multi-level** – communication from the organisation to volunteers, from volunteers to the organisation and between volunteers. Communication is also focused on the individuals involved, as well as related to the roles they hold within the organisation.

**Timely** – communication occurs regularly and information is available and accessible when needed.

**Comprehensive** – systems and procedures are in place to ensure information is accessible to all and that blocks to communication are identified and minimised.

**Inclusive** – information and communication is made accessible to all. The underlying principle is of mutual trust and respect. Communication initiated by volunteers is valued.

Mechanisms to facilitate communication within your organisation might include:

- team meetings
- regular reviews seeking volunteers' feedback and insights about programs
- opportunities for volunteers to provide feedback during debriefing sessions after significant events
- notice boards
- volunteer newsletter
- communication book
- mail outs of specific information
- distribution of minutes of meetings
- including volunteers as members of committees
- promoting volunteers to act as volunteer representatives on various committees
- developing and implementing clear guidelines and responsibilities for committees
- including organisational updates and role-related updates in development sessions
- updated orientation conducted on a regular or needs basis
- social events with interactions between volunteers and paid staff

- team-/role-specific updates and newsletters
- development and implementation of an effective grievance handling procedure and policy
- encouraging volunteers to speak for themselves at official presentations
- implementation of a buddy or team system where volunteers and staff can inform each other

### **3. Developing a team identity**

A very effective way to link volunteers is to develop a team identity within your volunteer program. This can be done by developing a team for each day your volunteers work for example, the Monday team.

The following strategies will assist you in developing a team approach within your volunteer program:

- Reward and recognise the team rather than individuals in the team.
- In selecting people for your teams, identify the right mix of skills to do the work.
- Encourage openness and trust-building in the team through modelling these behaviours yourself and by providing a supportive atmosphere for the group to develop.
- Provide interesting work that people can engage in together, rather than independently.
- Encourage and support the team to individualise their work space together to create a sense of their collective identity.
- Allow the team to decide and develop their own processes.
- Ensure the group has tasks that are not segmented. This will ensure people can see the end result. Groups who have responsibility for the results of their work inevitably perform better as they know why they are doing it and the difference it is making.
- Make it fun!

*Volunteering in action — museum stories*

### **Redcliffe Museum: Work Groups and Team Leaders**

The Redcliffe Museum is blessed with a large force of volunteers: at any one time there are up to sixty regularly working with another twenty or so ‘on the books’. With such a large group, organising them could have been a real problem.

As many volunteers were not interested in working in all areas of the museum’s operation, a decision was made to divide them into a series of ‘work groups’ that would meet regularly to carry out work in their area of specialisation. The current work groups are: Customer Service; Collection Management; Exhibition Development; Conservation; Administration; Promotions & Fundraising; and Education.

Each group has a team leader, who organises the group and is the first point of contact for the curator in matters involving their area of specialisation. The teams also work together on specific projects to achieve desired goals.

The work groups’ success is based on two factors. First it allows volunteers to specialise and pursue their own areas of interest. Secondly, the system was developed in conjunction with the volunteers themselves, and thus they have a feeling of ownership over it, as it was not forced upon them from above.

**— Peter Appleton, curator, Redcliffe Museum**



## CHAPTER FIVE

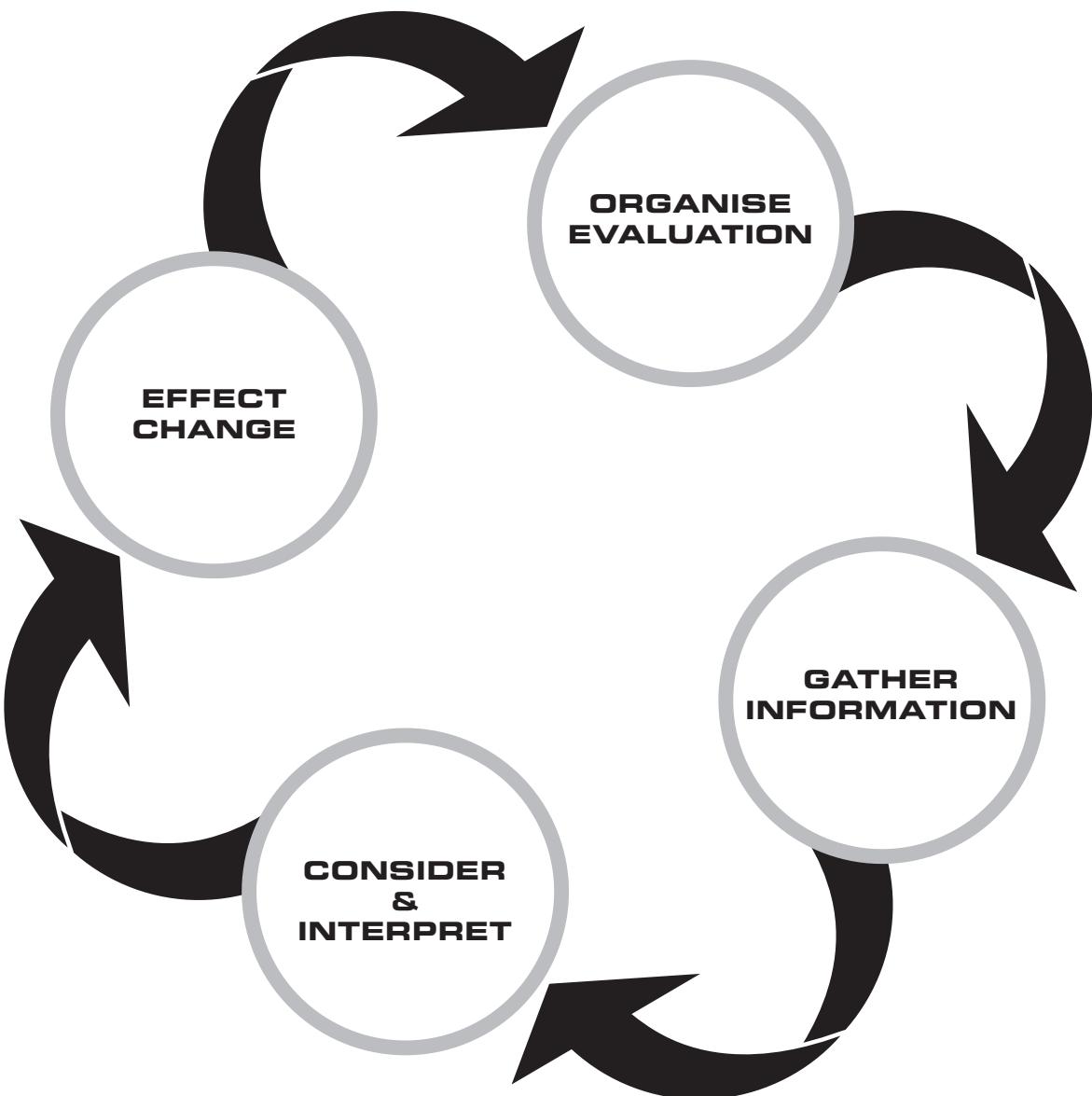


REFLECT & ADAPT





## Model for reflecting on and adapting a volunteer program





## 5.2 Reflect and adapt

The benefits of taking the time to reflect on your achievements and identify any gaps or issues in your volunteer program cannot be underestimated. A thorough and systematic review of your organisation's achievements and outcomes can help you identify points of weakness, areas of strength and areas requiring further development.

A review process consists of four elements including:

- organising evaluation
- gathering information
- considering and interpreting the information
- effecting change

It is most beneficial to undertake a review in a group setting. By undertaking the review process as a group you can combine resources and problem-solving abilities. It is important to remember that people will bring different experiences, skills and perceptions to the process. It is therefore very important that the group acknowledges the contribution of each individual during the process whether or not their ideas or suggestions are adopted. In this way the group can develop a shared understanding of the challenges facing your organisation and share the experience of working as a team to meet the challenges.

This process should not be seen as a static one-off approach, rather as an ongoing and ever-developing process.



Getting information and data will be substantially less time-consuming if systems or processes are already in place for gathering information throughout the year. In some cases unless systems are established prior to a review process, information (such as the number of hours worked or the recruitment source) simply won't be available.

### Stage 1: Organise evaluation

Consider the following aspects of a volunteer program when deciding what you are going to review and evaluate.

#### What to evaluate

- planning: strategic, operational and financial
- work environment or culture, including relationships, teamwork, communication, consultation, satisfaction, met/unmet needs of stakeholders
- administration and reporting
- work roles, job descriptions, allocation of work, work performance, feedback
- recruitment
- matching, screening and selection of volunteers
- the transition process, including agreements, orientation
- development and training
- volunteer leadership, including all people who have responsibility for working with volunteers
- support and supervision
- feedback and involvement
- valuing and recognising volunteers and their involvement
- exit practices: resignation (or dismissal) of volunteers

Some possible questions that you may consider in your review might be:

- Are there a variety of approaches available?
- Are they accessible?
- Are our processes consistent and consistently utilised?
- Are they fair and equitable?
- Are they appropriate?
- Are they relevant and effective?
- Are they practical and realistic?

## **The Making of a strong volunteer program**

Why do people become volunteers? It is important to realise that people often become volunteers to fulfil some personal objective that may or may not be related to the objectives of the organisation. The challenge is for the organisation and the volunteers to achieve their mutual objectives.

To achieve a successful volunteer program I believe that the following elements are important:

- a. Strong leadership.** Whether managing their own activities or under the umbrella of another organisation, strong leadership is essential. Volunteer groups can become unstuck when they appoint the most senior person as their leader only to discover that person does not have good leadership skills.
- b. Financial autonomy.** I have observed that a sense of, or actual, financial autonomy seems to be important to volunteers. A successful model I have employed involves the volunteer group in the management of the financial planning and implementation of their activity but retains full accountability with the parent company.
- c. Good communication.** The lines of communication are maintained by good communication that helps keep the rumour mill to a minimum.
- d. Quality v. quantity.** I believe that this helps maintain a strong sense of achievement and goal orientation within the group.
- e. Inclusive management style.** The group maintains a healthy outlook if it is genuinely involved in the management of the volunteer program.
- f. Goal orientated.** Most volunteers will only stay as long as they feel they are needed and the organisation is achieving its goals. This needs careful planning as the time that volunteers devote to the program may only permit low volume activity but one that still provides a sense of achievement.

— Ian Jempson, General Manager, Waltzing Matilda Centre Ltd, Winton

## **Stage 2: Gather information**



### **Exercise: Evaluation**

Directions: You will need paper and pens to record your responses.

As a group revisit your 'Rationale for Volunteer Involvement'. Consider and discuss whether or not your volunteer program is a reflection of your rationale. Identify and list why it is or isn't. Prompt a response from the group by taking turns to describe what would be happening for your organisation, the volunteers and the community if your rationale was reflected in your volunteer program.

(Before proceeding you may need to identify and gather appropriate information and data sources from which you can review and discuss the following. This could include but is not limited to: volunteer recruitment and turnover rates, organisation publicity and promotions, and audience participation rates.)

Has your program generated any of the following responses:

- All placements are filled.
- New placements can be filled within a few days.
- Volunteers and other staff are satisfied.
- The organisation has achieved a reputation for having a great volunteer program.
- Increased enjoyment and satisfaction from visitors is evident.
- Staff members who were previously against volunteers have changed their minds.
- The organisation has a high public profile.
- Visitor numbers are increasing through volunteer word-of-mouth.
- Interest in volunteering is increasing through word-of-mouth.
- Signs of partnership, trust, understanding, opportunity and agreement-seeking exist (see Chapter 1.5 'Attitudes for Effectiveness').

From this exercise you may be able to identify areas needing further investigation.

Once you have decided what to evaluate, you will need to gather the information you require.

### **Some possible ways and means for collecting information include:**

- Gather and review statistics through charts, graphs and other comparisons.
- Generate written or verbal surveys or questionnaires that ask the questions that you need feedback about.
- Review your budget to identify particular patterns.
- Conduct interviews with past and present volunteers/staff or even visitors.
- Conduct face-to-face or written exit interviews with volunteers.
- Collect and review solicited and unsolicited feedback eg. complaints/compliments.
- Raise points for discussions at group meetings and gather feedback.
- Create focus groups to consider specific issues.
- Examine reports and track information.
- Go over meeting minutes for information about the actions taken (or not taken).
- Create checklists for observation throughout the organisation.
- Review and analyse the critical incidents that have occurred within the review period.

### **Stage 3: Consider and interpret**

Even when you've collected a lot of information there is still a need to appropriately interpret it. When an issue has been identified, consider the range of possible causes or influences.



**TIP**

**FOR LEADERS**

Part of the challenge of gathering unbiased feedback is the receptiveness of the leaders to constructive criticism. Responses to critical feedback are important. Critical feedback offers the possibility of learning something new and valuable about your performance. Effective feedback should be based on past, not future behaviour.

Remember to:

- Remain open to all information.
- Check your understanding.
- Ask questions.
- Seek clarification.
- Ask for examples.
- Note areas of agreement.
- Note areas of disagreement.
- Consider the accuracy and potential of what you've just heard.
- Collect additional information from other people.
- Observe your own behaviour more closely.
- Don't over-react or get defensive.



**TIP**

In change efforts, we often begin with the most pressing and largest problem. This can lead to frustration and disappointment. It is often more effective to begin with a less difficult change, and create an atmosphere of success, before tackling the big issues.

### **Stage 4: Effect change**

Whatever is discovered through the evaluation process could be used to enact change. In fact, if the information gained is not effective, volunteers and other staff are not likely to want to participate in future evaluations.

Reactions to change vary significantly. In many cases it may be positive; volunteers are often enthusiastic or optimistic about change if they can see the need or the benefit of the change/s. However, there are circumstances where reactions may be negative: anger, annoyance or frustration, shock, surprise or denial, or simply apathy. There are many approaches to managing change. We suggest you follow the 4 C's.

#### **Comprehend**

Change is a complex process and often undertaken without adequate forethought or planning. Before you make changes, make sure you have an understanding of the reasons and need for change, how you are going to make it change, and what some of the impacts of this change might be.



### **Consider**

Consider how people might be affected and the issues they may have with change. Whether these issues are real or perceived, they still play a central role in how people respond to change.

### **Consult**

Encourage participation in planning change and how final decisions will be made. Through consultation you can build and maintain trust. Involving people in the process wherever possible can not only help them to feel more comfortable, it can also provide useful insights to assist in managing the change process.

### **Communicate**

Keep people informed on an on-going basis and ensure that they are aware of the end result.

Remember to provide communication in a variety of formats that are appropriate for those you are working with.

Evaluation and implementing change are the final components of the *Willing & Able* approach to building volunteer programs. Remember that a good volunteer program is never complete and benefits from regular review. The planning cycle for your volunteer program should include regular consideration of

- Issues effecting community involvement
- Issues associated with engaging and managing new volunteers
- Leadership
- Ongoing evaluation

The resource section has been developed to link you with organisations that can help you further develop your program beyond *Willing & Able*. Alternatively you can contact Museums Australia (Qld), Volunteering Queensland or your nearest volunteer centre or resource agency.

This final case study brings together the concepts put forward in the *Willing & Able* handbook and describes them in action — at the Hervey Bay Regional Gallery. This is the story of their Volunteers Installation Team, told in by Ingrid Hoffman, Hervey Bay Regional Gallery.

### *Volunteering in action — museum stories*

## **Hervey Bay Regional Gallery Volunteer Installation Team**

### **Background**

Various combinations of paid personnel and volunteers in regional galleries and museums form a range of staffing models adapted to circumstance and need.

As a training and professional development initiative, *Willing & Able* offered a democratic occasion for coordinators of volunteers from the sector – both paid and unpaid – to gain skills and insights into the recruitment, management and retention of volunteers.

Workshop leaders from Volunteering Queensland, with input from RGAQ and MA (Qld), presented motivational strategies for maintaining successful volunteers programs, and many stories of achievement were shared. However, the workshop also invited problematic issues to be aired.

Both successful in some areas and problematic in others, the case study of Hervey Bay Regional Gallery's volunteer installation team allowed attendees to consider the benefits of this Gallery's reliance upon a trained technical team, which has been in place since the Gallery opened in 1997. As the presenter of this case study and the Director of Hervey Bay Regional Gallery, I added my perspective on the challenges certain entrenched patterns of operation can pose to a new staff member.

### **Facts and Opinions**

Beginning objectively, I presented key facts about Hervey Bay Regional Gallery's installation team, comprising twelve people, most of whom participate in any given exhibition installation/demount. In summary:

- Only one member of the team is under the age of 60.
- Most team members were originally trained in formal museum procedures by Queensland Art Gallery staff and consultant, Bettina MacAulay, in 1997.
- Installations and demounts take place usually once a month on the same day, Monday, except on public holidays.
- Crate handing, unpacking, condition reporting and hanging/installing of artworks is undertaken by team members.
- In 2001 the team weathered an unpopular restructure of the original gallery staffing structure and has had to adapt to my new style as a hands-on curator/director.

- In the past, most decisions about exhibition hangs and installations were left to the installation team and not guided by the Director, unless in the case of travelling exhibitions, where visiting curators guided the process.
- The team is cohesive and maintains a high level of Gallery ownership.
- Most members of the team express preferences for traditional artwork and are unwilling to participate and are sometimes hostile when faced with ‘installation art’ needing to be installed by artists in the exhibition space.

The final two points were pivotal in prompting questions from workshop participants, leading to expressions of the following opinions:

- Perceptions of who holds the power, professional staff or volunteers are subtle and perplexing.
- Citing a recent exhibition example at Hervey Bay Regional Gallery, I recounted how Installation Team members were disparaging toward the work of a young, emerging Bundaberg artist, whose practice involves installing found ‘retro’ objects from opportunity shops. Tempers frayed when this art was deemed ‘junk’, and the protocol of remaining objective was not observed.
- Training in technical approaches to current modes of contemporary art, particularly installation art practice, would be beneficial for Hervey Bay Regional Gallery volunteers, as a way of fears and negative perceptions around ‘newfangled’ contemporary art and stereotypes about contemporary artists.
- Flexibility is needed on both sides. Routines may become entrenched and timeframes too rigid. The ‘Monday only’ arrangement becomes difficult when unexpected contingencies arise with freight/crate deliveries.
- Change management is a necessity for practitioners in the cultural industries. Council restructures leading to staff changes, exhibition policy changes and the introduction of new practices in visual art culture are likely to continue.

#### *Developments since Willing & Able*

My interaction with peers at the workshop led to new communication strategies being implemented by recently recruited Exhibition Officer, Allison Bateman,

and myself, with the Hervey Bay Regional Gallery installation team. Developments include:

- Installation Team members expressed the need for routines to be maintained due to other volunteer and leisure commitments. Gallery staff expressed the need for flexibility at certain times. A compromise was reached, acknowledging the requirement for advanced warning when changes to routine are imminent.
- The idea of recruiting and then mentoring new, younger members of the team was agreed upon.
- Retirement of several members was discussed. After five years of dedicated service, health and safety issues and burnout have become a reality.
- The challenge of accommodating future exhibitions of contemporary art involving installation practice was discussed. Several team members welcomed a specific training session in contemporary art trends, while others declined the option.
- Through MA (Qld) the suggestion was made that Queensland Art Gallery could offer targeted training for volunteers in this area.

#### *Positive Outcome*

Queensland Art Gallery (QAG) Exhibition Officer Elizabeth Bates welcomed the chance to facilitate a training session for Hervey Bay Regional Gallery Installation Team members. During the 2002 Asia Pacific Triennial, QAG preparators and technicians will induct team members in their approaches to installing contemporary art, and the protocols of working with artists in the Gallery space.

This outcome is now anticipated with great enthusiasm by Gallery staff and volunteers. A bus trip to Brisbane to see art is always a bonus!

*Willing & Able* was a helpful catalyst for me as the presenter of the case study above. It has helped clarify my policy-making, communication strategies and the management of volunteers, through the supervision of our Exhibition Officer.

Hervey Bay Regional Gallery is evolving with a new understanding of the need to recognise change in the contemporary world and to be open, questioning and flexible in all aspects of our human interactions.

— **Ingrid Hoffman, Hervey Bay Regional Gallery**







**Web resources** – correct at time of publication

**<http://www.volunteeringqueensland.org.au>**

Volunteering Queensland's website contains information about job referral, training and peak body activities.

**<http://www.maq.org.au>**

Museums Australia (Qld)'s website offers information, advice and support for museum and gallery workers as well as training and professional development opportunities. The site also includes access to publications, the Museum & Gallery Finder, the Consultants & Suppliers Register and many other resources and links to useful sites.

**<http://www.energizeinc.com>**

This publishing company specialises in volunteer management. This site contains a great library section and some good links.

**<http://www.cybervpm.com>**

Perhaps the best site on volunteer management with lots of readings and a whole course on volunteer management. Great links and some very good articles covering the scope of managing volunteers.

**<http://www.charityvillage.com>**

A vast site based in Canada with a range of research on a broad range of topics regarding not-for-profit organisations.

**<http://www.casanet.org>**

The Court Appointed Special Advocates site has some excellent articles on volunteer and board management.

**<http://www.ncnb.org>**

This site is the National Centre for Non-Profit Boards in the US and has a range of articles and resources for boards.

**<http://www.iknow.org>**

The Interactive Knowledge for Non-Profits Worldwide site specialises in providing key links and information resources for non-profit organisations.

**<http://www.nonprofit-info.org/npofaq/>**

The Internet Non-Profit Centre provides a list of frequently asked questions by board members and answers to these questions provide a great resource for board training.

**<http://www.pointsoflight.org>**

The Points of Light Foundation and Volunteer Centre site is one of the peak bodies in America for volunteering.

**<http://ctb.lsi.ukans.edu>**

Community Tool Box has a range of articles about activism and citizenship from the US. It provides a fantastic set of links.



## Australian Publications

- ACCESS & PATHWAYS: *Volunteering in Queensland; Volunteering Queensland*; 1999
- BE PREPARED: *Guidelines for Small Museums For Writing A Disaster Preparedness Plan*; Söderlund Consultants & Heritage Collections Council, 2000
- JUST A TICK: *A best practice survival guide for committees and boards of management*; Kate Reynolds; 1999
- MUSEUM METHODS: *A Practical Manual for Managing Small Museums*; Museums Australia Inc (NSW); 2002
- NATIONAL STANDARDS FOR INVOLVING VOLUNTEERS IN NOT-FOR-PROFIT ORGANISATIONS; *Volunteering Australia*; 2001
- reCOLLECTIONS: *Caring for Collections Across Australia*; Heritage Collections Council, 1998
- SECRETARY'S HANDBOOK; Dr Myles McGregor-Lowndes; 1998
- SIGNIFICANT EVENTS: *A Museums and Galleries Training Program*; Dr Sharron Dickman & Kylie Winkworth; 2001
- VOLUNTEER MANAGEMENT: *An essential guide*; Joy Noble & Louise Rogers; 1998
- VOLUNTEERS & PAID WORKERS: *A collaborative approach*; Joy Noble; 1997
- VOLUNTEERS AND VOLUNTEERING; Jeni Warburton and Melanie Oppenheimer; 2000

## International Publications

- 101 MORE IDEAS FOR VOLUNTEER PROGRAMS; Steve McCurley and Sue Vineyard; 1995
- 101 TIPS FOR VOLUNTEER RECRUITMENT; Steve McCurley and Sue Vineyard; 1988
- 101 WAYS TO RAISE RESOURCES; Sue Vineyard and Steve McCurley; 1987
- BY DEFINITION: *Policies for volunteer programs*; Linda Graff; 1997
- MEGATRENDS & VOLUNTEERISM: *Mapping the future of volunteer programs*; Sue Vineyard; 1993
- PRECISION MANAGEMENT; *How to Build & Manage the Winning Organisation*; Rick Lynch; 1985
- FROM THE TOP DOWN: *the executive role in volunteer program success*; Susan J Ellis; 1996
- MANAGING VOLUNTEER DIVERSITY: *A rainbow of opportunities*; Sue Vineyard and Steve McCurley; 1992
- STOP MANAGING VOLUNTEERS: *New competencies for volunteer administrators*; Sue Vineyard; 1996
- SUPERVISING VOLUNTEERS: *An action guide for making your job easier*; Jarene Frances Lee with Julia M Catagnus; 1999
- THE (HELP!) I DON'T HAVE ENOUGH TIME GUIDE TO VOLUNTEER MANAGEMENT; Katherine Noyes Campbell and Susan J Ellis; 1995
- THE VOLUNTEER RECRUITMENT (and membership development) BOOK; Susan J Ellis; 1996
- VOLUNTEER MANAGEMENT: *Mobilizing the resources of the community*; Steven McCurley and Rick Lynch; 1996