



**Archives & Records
Association**
UK & Ireland

VOLUNTEERING in COLLECTIONS CARE

Best Practice Guide 2011

Contents

Why work with volunteers for collections care?

What makes a successful project?

1. Paperwork
2. Planning and task descriptions
3. Selection and interview
4. Training and support
5. When it goes wrong
6. Insurance, expenses and H&S
7. Supervision

Produced by Helen Lindsay
London Metropolitan Archives

Please note: the full report 'Volunteering in Collections Care' includes detailed information on volunteering in archives and libraries, case studies and examples of policy and agreement documents. Available at:
<http://www.archives.org.uk/ara-in-action/best-practice-guidelines.html>

Why work with volunteers?

The benefits of working with volunteers come in many guises; there are the formal strategic benefits which enable managers to fulfil the delivery of organisational aims and improve or extend services. There is the simple advantage of getting a job done that might otherwise forever languish on a wish list. Then there are the opportunities for self-development and learning for the volunteer, as well as potential social and employment advancement.

There are also major benefits for conservation by encouraging more people to come into contact with historic material. By actively positioning conservation services closer to the centre of an organisation and helping the world of the collections conservator to become more visible volunteers can help prevent them being seen as 'add on' activities.

*“In the end we will conserve only what we love.
We love only what we understand.
We will understand only what we are taught about.”¹*

Volunteers are motivated by a variety of factors both altruistic and practical. The desire to 'give something back', to make a difference by contributing their skills, knowledge or experience is often mixed in with a wish to make new friends or occupy themselves within a social environment. Other volunteers see the activity as a gateway to gaining practical skills, to add to their CV or as a stepping stone to employment.

The contribution volunteers make can provide welcome practical improvements to a service and together with the professional input from staff they can significantly enhance the work of the archive or library and its social capital.

What makes a successful collection care volunteer scheme?

Collections care activities frequently involve tasks that require patience, concentration and attention to detail; even if the job is simply to re-number items it has to be done right, consistently, otherwise time spent correcting mistakes will far outweigh any useful input from the volunteer.

Training is important; recruitment and supervision are crucial and so is valuing your volunteers. Ensuring that the volunteer scheme reflects the aims and ambitions of the organisation is a core principle but, most importantly; all the factors listed below have to work together and be part of the ethos of the organisation in a coherent and constructive manner.

Principles for success

- Schemes embedded in the organisation via induction, training and recognition of their value
- Evaluation and promotion of the scheme to sector and community
- Activities fulfil organisational aims
- Selection of suitable volunteers
- Effective training – for the volunteer and the supervisor
- Clear written instructions of tasks to be carried out
- Enough time given to ongoing supervision and 'chatting time'
- Well planned scheme of work
- Activities and volunteer well matched
- Appropriate resources – enough space, supervision time

¹ Baba Dioum the Senegalese environmentalist

1. Paperwork

If an individual is in sympathy with the organisation's aims and ethos they will be much more willing to give up their time to a volunteer role. It is important therefore that the individual understands the organisation and its purpose, and supports its endeavours as much as they are interested in their own needs. A volunteer policy document can help towards this aim.

Volunteer policy

The volunteer policy is the foundation on which the archive or library will develop their volunteer programme giving it cohesion and consistency. It is the key to ensuring that volunteers are dealt with fairly. There is no standard length or format for a volunteer policy but some basic elements should be included;

- what your organisation does and why it involves volunteers;
- recruitment;
- training;
- monitoring and supervision;
- expenses;
- equal opportunities and diversity;
- health & safety
- grievance and disciplinary procedures;
- confidentiality.

Volunteer agreements

Volunteer agreements are widely used within the voluntary and community sector to specify the organisation's commitment to its volunteers and what it hopes from them. They are given to the volunteer but do not have to be signed by them. They usually cover the following statements of intent:

- general declaration of goodwill;
- information on training and meetings the volunteer can expect;

- name of the main point of contact;
- information on whether expenses are reimbursed;
- information on what sort of work the organisation is expecting;
- requesting that volunteer agrees to work reliably, to the best of their ability and to follow the organisation's rules and procedures.

Volunteer handbook

A volunteer handbook may also be compiled as a single source of information for volunteers and can be used as a 'welcome pack'. If a handbook contains a lot of information, just one of two copies may be kept in the tea room or work area for general reference.

Checklist for paperwork	
Basic documentation -	
▪ volunteer details;	- for the organisation
▪ task description;	- for the organisation
▪ volunteer agreement;	- for the volunteer
▪ guidelines for specific tasks;	- for the volunteer
▪ volunteer policy.	- for the volunteer
Further documentation may also include -	
▪ interview checklist;	- for the organisation
▪ induction checklist;	- for the organisation
▪ expenses claim form;	- for the volunteer
▪ volunteer handbook;	- for the volunteer
▪ record keeping and statistics.	- for the organisation

Further information and resources

www.volunteering.org.uk

www.volunteermatch.org

www.collectionslink.org.uk

www.creatingcapacity.org

www.icon.org.uk

Lindsay, Helen *Volunteering in Collections Care*, 2010

<http://www.archives.org.uk/ara-in-action/best-practice-guidelines.html>

Ray, Louise *Volunteering in Archives*, NCA June 2009

2. Planning and task descriptions

Some archives and libraries have lists of potential volunteer jobs; commonly such a list will include both short and long term schemes of work, and cover a range of skill levels. Others have a single major reason to set up a volunteer programme and wish to find the right individuals to help carry out a specific scheme of work.

Whatever the starting point the relationship between the volunteer and the organisation has to work for both parties, not just be about the task that needs doing or the volunteers' requirements; the most successful projects provide a balance between the organisation, volunteer and task.

With even the most basic work it should be clear **how** it benefits the organisation as a whole and **what** the volunteer is getting out of it.

It may be useful to give the project a name – '*Repackaging 100 Registers*' or the '*Conservation Support Programme*'. This can help to give the volunteers 'ownership' of their work and make it easier to describe to managers or funders. You may also want to consider the aims for the scheme of work.

Aims for a scheme of work

'To bring the packaging of a collection of vulnerable 19th century newspapers up to modern archival standards'.

'To reduce the handling of costumes by providing safe storage'.

'To increase access and reduce handling by providing electronic copies of photographic negatives'.

'To broaden diversity and provide opportunities for learning'.

The planning stage should also include a general assessment of what resources are needed. Depending on your scheme, you may want to consider the following; work space, materials, equipment, storage of work in progress, lockers for volunteers' possessions, initial training needs, amount of time needed for ongoing supervision and further training.

Before recruiting volunteers it is important to have a clear idea of how the work will be carried out and what the volunteer roles are. Recruitment is a time consuming process and you want to end up with the right person in the right role.

Simple Task Description

Volunteer role:

Main point of contact:

Hours and availability:

Location and work space:

Main activities/tasks:

Skills/experience:

Support/training:

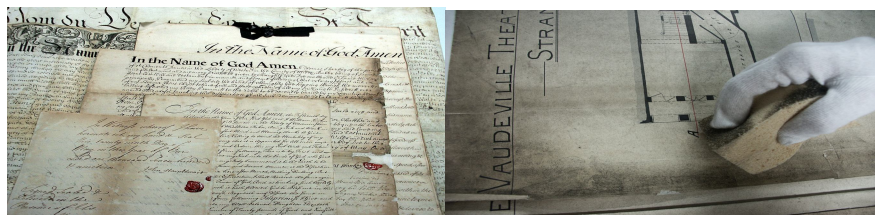
Developing a written task description² is an effective method of defining what you want the volunteer to do, although be careful not to make an activity sound too complex or inexperienced, but able, people may be put off - keep it simple.

Task descriptions can be short but they need to cover the basic information the volunteer needs in order to understand what they are being asked to do, where they will work, what training they will be offered and who they should go to for advice or support. They form the basis of the 'volunteer agreement' which is given to the volunteer when they start.

² National Centre for Volunteering and Volunteering England have further advice on task descriptions for volunteers. They are also sometimes called role outlines.

Many organisations also produce crib sheets or guidelines giving detailed information on how to carry out a specific task. They can sometimes be written by the volunteers themselves or by an external conservator.

If the library or archive has a dedicated area for volunteers it can be useful to produce the guidelines in large print and pin them up in the work space.



Images courtesy of London Metropolitan Archives

There is nothing wrong with a scheme of work with just one volunteer – not all projects have to consist of groups.

Tasks carried out by volunteers vary considerably; depending on the amount of training that can be offered, the skills and knowledge of the pool of volunteers and the amount of space that is available. The most common activities are;

- re-packaging
- numbering and stamping
- surveying
- surface cleaning books and documents
- flattening & re-folding documents
- sticking in loose pages
- paper repair
- re-binding books
- repair of books
- box making
- documenting and making inventories
- scanning

3. Selection and interviews

In the words of an archivist experienced with volunteers '*selection is key*'. Recruitment and training are time consuming and it is important to end up with the right person in the right role otherwise it can be frustrating for all concerned. It is also important to consider why the role is important for a volunteer rather than as a paid position.

It is good practice to value and respect the contribution volunteers make but also to have a clear distinction between paid and volunteer roles. This can be achieved through the language used (role not job, volunteering not work) but should also be underlined in practice by a differentiation of tasks and responsibilities.

The task description is useful to use as a basis for advertising a volunteering opportunity or give to someone making an enquiry. The routes for advertising that have been shown to be most successful for collections care schemes are:

- notices in reading room or other public area;
- leaflets or forms at an open day;
- direct approaches to a University for students;
- word of mouth;
- websites;
- NADFAS;
- Friends or other local community groups.

Decide if you will be asking for references and ensure that the volunteer is able to provide them if necessary. Many people who want to volunteer do not want to spend lots of time filling in forms but a few basic details at an early stage are important:

Contact details: Times and frequency of availability: What sort of skills and experience they have: Any special requirements: Why the role is of interest:
--



Image courtesy of University College London Library Services

It is advisable to hold an informal interview or 'chat' prior to starting a volunteer. Sometimes they may be attracted to an organisation by one activity but it may become apparent during an interview that another role might be more suitable.

Points to cover during an informal interview

Things to tell them -

- about the organisation - what it does, how many people are involved, why collections care is important;
- how the volunteer scheme operates – tea breaks, location, where to put coats, etc;
- what their task will involve;
- what training and support will be available;
- what the organisation expects from the volunteer and why it has a volunteer agreement.

Things you want them to tell you -

- what attracted them to volunteer with your organisation;
- what do they understand about what the archive or library does;
- what they hope to gain;
- an assessment of their own dexterity;
- relevant skills, interests or experience;
- time availability;
- any special resources

Broadening diversity

As most routes into collections care volunteering are via existing networks organisations wishing to make contact with other sections of the population will need to be proactive and reach out in new ways.



Image courtesy of London Metropolitan Archives

Here are some suggestions for positive actions that can help extend the diversity of collections care volunteers:

- include 'broadening diversity' in the aim of the volunteer scheme;
- if part of a funded project, include some support for recruitment of difficult to reach groups;
- make direct personal contact with community groups, schools or youth groups;
- work in partnership with any learning or outreach projects;
- be clear about the amount and type of training you are able to offer;
- find a volunteer who can act as a 'Community Champion' for the organisation³⁴.

³ See the full report on *Volunteering in Collections Care* for more details.

⁴ *Working with volunteers – an introduction to good practice* AIM Focus Paper, Bridget Yates 2006 The interview chart is adapted from this leaflet.

4. Training and support

Welcome your volunteer into the organisation with an effective induction or training day and you will lay the foundation for a successful working relationship. How formal you want to make that welcome will depend on the style of the organisation as well as the background of the volunteer.

Archives and libraries with conservation support (internal or external) can take on volunteers for relatively complex conservation tasks if they have a member of staff able to provide the necessary training and supervision. Conservation students often act as volunteers and can bring a wealth of enthusiasm, stimulating new ideas and motivation into the workplace.

Organisations without conservation support tend to engage volunteers for different types of tasks; usually re-packaging, numbering and scanning.

Whatever the skill level of your volunteer, collection care activities need specific attributes, including; patience, manual dexterity, concentration, attention to detail and sensitivity to handling fragile objects.

Training can also be provided by an external conservator and a format shown to work well consists of up to 4 days training at the beginning of a scheme covering information on a range of aspects of collections care as well as information specific to the programme of work.

This initial day can be followed up 3 months later to look at issues arising in the intervening period, review the earlier training and cover more complex conservation tasks for those able to carry them out. A regular annual training day will then help to keep the project on track.

Don't forget that staff managing, supervising or instructing volunteers will also need some training.

5. When it goes wrong

Even with well run volunteer programmes there can be difficulties with mis-matched volunteers, personality problems or projects that go off course and the first step in dealing with an issue will always be to listen. It may be a difficulty between volunteers or with a scheme of work but a small problem which could be easily resolved can turn into a much larger issue if left unchecked. In the words of an experienced collections care volunteer trainer:

*"It's no good shying away from any issues.
Sit down with a cup of coffee and talk it over."*

If the problem is still not settled, try to;

- move a volunteer to a different team or time;
- attempt a different task;
- give them extra support or training;
- make sure they really have understood what is expected.

The most common result of an ongoing issue is for the volunteer to leave but it is still a good idea to have written problem solving procedures included in your volunteer policy document.

These 'problem solving procedures' should include how to deal with any serious breaches of an organisation's policy or procedures, such as; wilful disregard of H&S procedures or discrimination. The procedure should outline structured stages and could include the provision for a disinterested party to listen to both sides.

Most difficulties can be satisfactorily dealt with informally through support and positive supervision and if there are clear boundaries and instruction given to the volunteers when they start it will be much easier to diffuse problems if any do arise.

6. Insurance, expenses and H&S

An archive or library with paid staff will already have **Employer's Liability Insurance** and the existing policy should be scrutinised to ensure that it covers volunteers for the tasks they are being asked to undertake. In addition, the organisation's **Public Liability Insurance** should be checked to ensure that it explicitly covers the actions of the volunteers.

While it is good practice to pay expenses for volunteers, increasingly archives and libraries are finding them difficult to cover, especially when they have large numbers of volunteers. If expenses are not offered this can limit the range of people able to volunteer but whatever the organisation decides it must apply it to everyone equally.



Images courtesy of Westminster City Archives and London Metropolitan Archives

Expenses should only ever be paid for costs incurred as a result of volunteering and must always be accompanied by receipts. The organisation should have a volunteer expenses claim form to ensure that this is done consistently.

It is advisable to carry out a risk assessment for volunteer activities and if necessary ensure that the volunteers are aware of any pertinent COSHH assessments if work is carried out in a conservation studio.

7. Supervision

Supervision is part of the support an organisation offers its volunteers but also provides an opportunity for constructive feedback and monitoring. Collecting statistics on progress can be extremely useful for funding applications, ordering materials, timescales and explaining the benefits of the scheme to staff and managers.

The amount of supervision will vary; some organisations can provide separate work spaces whilst others have stringent rules which restrict certain activities, but it is likely that the minimum a group project will need is between 30 minutes and 1 hour in staff time for each day they run. Simple independent projects may require a low level of supervision but the standard and accuracy of work still needs to be monitored.

Retaining volunteers

The management of volunteers is distinctly different from that of paid staff who can be motivated by their pay and have to act within contractual obligations. Volunteers can leave at any time, without notice, and indeed many do. As an archive volunteer manager noted;

"If they didn't like it they wouldn't come."

Losing volunteers is not necessarily a bad thing if they are moving on to paid work or have completed a project. In addition, individuals may have to stop volunteering due to a life event or illness. But if they are just drifting away, or leaving because they are unhappy then you need to assess whether the problem lies in selecting the wrong people or if they have not been fully supported.

The biggest reward you can give your volunteers is taking their contribution seriously but additional rewards such as annual events, birthday cards, recognising significant work milestones, providing refreshments or travel expenses also form an important part of motivating volunteers to continue their involvement.