



American
Alliance of
Museums

Designing a Museum Volunteer Program



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Why and How to Use this Toolkit

Whether you want to start a new museum volunteer program or revitalize an existing one, this toolkit will guide you toward the resources and framework you need to be successful and sustainable. By framework, we mean a combination of tools, policies, procedures, and systems you put in place to construct a well-run and sustainable volunteer program.

As you read through the toolkit, you will take stock of what you have in place already and what you'd like to have in the future. This will help you distinguish essential resources from aspirational ones and determine where to focus your energy and time. It will also create realistic expectations for your program which can be included in your museum's overall strategic plan and build a case for budget requests, grant writing, and appeals to donors.

This toolkit will guide you in making day-to-day decisions and setting future plans for your program.

Things to Know About this Toolkit

This toolkit focuses solely on crafting systems and frameworks. It explores what a volunteer management system needs, but does not detail how to address every topic important to a successful program.

For instance, conflict resolution is a common issue with a volunteer program. The toolkit does not explore skill sets or specific steps needed for conflict resolution. However, it does offer frameworks for communication, policies, record keeping, and risk management that will minimize the likelihood of conflict.

The Digging Deeper and Resource sections at the end of the toolkit offer more information and resources related to the "how-to" aspect of these elements.

You will notice references to human resource staff throughout. This refers to any representative at your museum (paid or unpaid and full-time or part-time) who handles human resources duties—an administrative assistant, a volunteer coordinator, a Board member, a committee chair, the director, or a dedicated human resources position.

Key Components of a Museum Volunteer Program Framework

The toolkit is organized into three sections:

- Structuring the Program
- Developing the Program
- Supporting the Program

Each section explores the key elements—such as policies, procedures, and systems—typically needed to run a sustainable and successful volunteer program. The professional standards from the American Alliance of Museums (AAM) and the American Association for Museum Volunteers (AAMV) aligned to each element are listed at the end of each section.

Structuring the Program

- Position Descriptions
- Marketing & Recruitment
- Application & Hiring Process
- Policies & Procedures
- Training & Development

Developing the Program

- Orientation & Training
- Evaluating Volunteers & Your Program
- Recognition & Rewards
- Professional Development

Supporting the Program

- Communication Network
- Record Keeping
- Risk Management
- Budget

Why does my museum need volunteers? How do they contribute to the museum's mission?

These are the first questions to ask. Answering them will help you:

- Determine what kind of volunteers you need
- Design job descriptions
- Create marketing to recruit volunteers
- Get buy-in from staff, administration, and the community
- Determine the resources your museum needs to sustain volunteers

Your answers should drive everything you do with your volunteers, which differs for each museum. Some museums mainly use volunteers for short-term commitments such as events and special programs. Others rely heavily on volunteers for docent-led tours, graphic design of flyers and brochures, keeping up with the collections inventory, renewing memberships, staffing the gift shop, and a host of other functions.

It's very important to answer these questions as a whole organization. Staff from all departments, administration, and current volunteers should all participate. With input from stakeholders, you'll better understand the museum's needs and how to deploy volunteers in a meaningful way. You'll also have more support and buy-in for your program.

You should revisit these questions periodically with your stakeholders to keep your volunteer program aligned with your museum's needs and current priorities.

The theme of collaboration and co-creation reemerges throughout this toolkit. The more you involve others in the process of exploring questions about your ideal volunteer program infrastructure and in co-creating content, the better your results will be and the more organizational support you will have.

Once you've answered these questions, make sure your volunteers know how they contribute to the museum's mission, so they understand their value to the museum and why their work matters. Making these contributions clear also helps build strong relationships between staff and volunteers.

Professional Standards:

AAMV #2: Museum staff identifies volunteer roles that serve the institution.

AAM #2.2: All aspects of the museum's operations are integrated and focused on meeting its mission.

AAM #3.2: The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.

“Most of the time, when a volunteer fails or becomes discouraged and dissatisfied with their role, it is because the reality of their project has differed from their expectations. Job descriptions are the first line of defense in miscommunication between the volunteer and the project manager.”

Van Hooven & Wellman, *Recruiting and Managing Volunteers in Museums*. P.51

Structuring the Program

Volunteer Position Descriptions

WHY? Job descriptions keep everyone on track and help manage the expectations of both volunteers and staff. Involving staff in creating volunteer job descriptions improves buy-in, sets realistic expectations, and is an opportunity to explore more deeply the museum needs volunteers can fulfill.

Whenever possible, it is a good idea to use job descriptions that are similar to those for staff by using the same language, headings, and sections. This reinforces institutional consistency and the attitude that volunteers add value.

WHAT? Include the following basic information:

- Name of position
- Name of supervisor
- Typical responsibilities and tasks
- Qualifications needed
- Orientation and training
- Required time commitment
- Dress code
- Minimum age requirement

WHO? For input, you should solicit the staff of departments where volunteers will be working, as well as volunteers already doing similar tasks. You could also reach out to other museums for examples and ideas.



DIGGING DEEPER

The person handling your human resources duties will be a vital resource.

All of the books and most of the websites listed in the toolkit Resources section include sample position descriptions. Sample descriptions are also available on the AAM website for Tier 3 museum members.

TIP: No time to create a full-blown job description? Write up a checklist of typical tasks and responsibilities for each volunteer position and use that as a starting point. Then add in the daily/weekly/monthly time commitment expected, any required training or orientation classes, and any required qualifications. Stick to the highlights and keep it in checklist format.



Professional Standards:

AAMV #2: Museum staff identifies volunteer roles that serve the institution.

AAM #3.2: The governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities.

AAM #3.4: The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.

Marketing & Recruitment

WHY? Creating a marketing and recruitment plan builds a foundation that is always ready for you. You will be prepared to enlist volunteers at that big festival, that campus recruitment fair, and on that phone call from the ten scouts who need to do community service by the end of the month.

Where and how you recruit will depend on what you need at the time. Recruiting for ten people to help with a special evening event requires a different approach than recruiting for summer camp volunteers. Museums may also do general recruitment that is not targeted to fit a certain need.

As you begin looking for new volunteers, take the opportunity to assess whether your existing volunteers accurately reflect the diversity of your community. If not, you should look for barriers in the wording and requirements in your descriptions, and explore new options for where and with whom you recruit.

WHAT? Are we welcoming?

- Are our recruiting and orientation/training materials welcoming to all?
- Do our materials mention diversity and inclusion?
- Do our materials establish protections or procedures for harassment?
- Are our materials accessible?
- Is our physical space accessible?
- Which of our tasks and responsibilities could be performed by people with disabilities?



DIGGING DEEPER

Marketing on a Shoestring Budget: A Guide for Small Museums and Historic Sites (American Association for State and Local History) by Deborah Pitel contains customizable suggestions and ideas to market volunteer opportunities, museum programs, and events.

See the following resources for more ideas on building a diverse, equitable, inclusive, and accessible program:

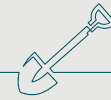
- [8 Strategies for Creating a More Inclusive Volunteer Program](#)
- [Museums and Equity: Volunteers](#)
- [10 Things We've Learned About Unbiased Hiring Practices at AAM](#)
- [An Institution's Guide to Gender Transition and Transgender Inclusion in the Museum Field](#)

WHO? Are we casting a wide net or do we talk to the same people repeatedly?

- Who do we currently target for recruitment?
- How do we recruit the majority of our volunteers?
- In what ways is that successful?
- In what ways is it not successful?
- What are some groups we don't usually reach out to? Why?
- Could we investigate some new community segments? (i.e. college students or interns, retired teacher groups, chamber of commerce, churches, libraries, scouts, homeschooling parents, corporate volunteers)
- Could we involve others in our organization, such as the board, our friends group, and current volunteers?

Types of Volunteer Recruitment

- Social media: Facebook, Instagram, Twitter, email
- Printed flyers/brochures
- Museum website
- Websites of other organizations
- Presentation to community organizations
- Direct mail
- Announcement for other groups to post or email
- Press release or request for media coverage
- PSAs for radio and TV
- Word of mouth



DIGGING DEEPER

Your museum may also want to discuss who not to recruit as a volunteer. For example, do you want to recruit minors as volunteers? Is it a potential conflict of interest if a major donor or the spouse of a board trustee is a volunteer? Will you accept volunteers who need court-ordered community service hours?

Professional Standards:

AAMV # 3: Recruiting is done in a fair manner so that information about volunteer opportunities is accessible.

AAM #3.4: The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.

AAM #1.4: The museum strives to be inclusive and offers opportunities for diverse participation.

AAM #1.3: Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.

Application & Hiring Process

Application Forms

WHY? An application form supplies basic information to screen and match potential volunteers, and helps with record keeping.

WHAT? You can often use the same application form for volunteers that you do for employees, with some minor adjustments. Be certain your form asks details about availability, such as what hours volunteers can work, how many hours per week or month they would like to volunteer, and if they are available on short notice.

WHO? All departments using volunteers should at least provide feedback on forms, to ensure the questions will help them in matching the right volunteer to the right job or project.

Professional Standards:

AAMV # 3: Recruiting is done in a fair manner so that information about volunteer opportunities is accessible.

AAMV # 4: Filling volunteer positions is done in a fair manner that ensures the best match for the job.

AAM #1.8: The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

AAM #3.4: The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.

Interview Process

WHY? Interviewing volunteers is crucial to getting a better sense of why they want to volunteer, what expectations they have, and whether they fit your organization and its current volunteer needs.

WHAT? You want to assess the volunteer's expectations, their prior experiences, their preferences, and their skills. You also want to understand their needs and motivations for volunteering.

It's equally important during the interview to share volunteer job descriptions, how schedules and assignments are determined and communicated, orientation and training information, and any policies such as drug screening.

You might give a facility tour at this point or wait until orientation.



DIGGING DEEPER:

The person handling museum human resource duties should be directly involved in creating your application forms, so they are similar to staff application forms and compliant with applicable laws.

Do you have a parent organization? You may need to make sure your policies and forms align with theirs.

Most of the books and websites in the toolkit's Resources section provide sample volunteer application forms.



DIGGING DEEPER

The person handling human resources duties should review your list of interview questions and procedures so that they are similar to those for staff and comply with applicable laws.

WHO? Staff who will be working with volunteers and senior volunteers themselves could participate in creating interview questions and, if appropriate, be involved in the interview itself.

Professional Standards:

AAMV # 3: Recruiting is done in a fair manner so that information about volunteer opportunities is accessible.

AAMV # 4: Filling volunteer positions is done in a fair manner that ensures the best match for the job.

AAM #1.4: The museum strives to be inclusive and offers opportunities for diverse participation.

AAM #1.8: The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

AAM #3.4: The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.

 **SEE INTERVIEW PROCESS SELF-ASSESSMENT FORM ON PAGE 22.**

Screening

WHY? Screening helps ensure a person is a good match with your institution and creates expectations of professionalism. It can also help prevent issues like theft and possibly minimize your risks and liability if something should happen, such as injury.

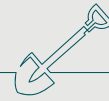


DIGGING DEEPER:

The six categories of volunteers and the case studies portrayed in *Recruiting and Managing Volunteers in Museums* by Hoven & Wellman explore volunteer motivations and needs in depth. This information can help with question design and with marketing.

WHAT? Consider the same processes you use to screen staff, like background checks, reference checks, drug screening, fingerprinting, and verifying government-issued identification. At a minimum, you should do reference checks to verify the volunteer is who they say they are.

WHO? Multiple stakeholders need to consult on volunteer screening procedures, such as human resources, administration in many museums, and the board and/or parent organization. The legal issues and potential liabilities involved are serious concerns requiring careful thought.



DIGGING DEEPER

The Resource section of this toolkit contains a link to an online list of legal and illegal interview questions for both volunteer and staff positions.



TIP: Write down key questions you will ask (this could become a short form if you generally ask the same questions) and then jot down responses to keep in the volunteer's file and give to staff in the department or area where the volunteer will work. This way, the person who will be supervising and training the volunteer will be better prepared.

Professional Standards:

AAMV # 3: Recruiting is done in a fair manner so that information about volunteer opportunities is accessible.

AAMV #4: Filling volunteer positions is done in a fair manner that ensures the best match for the job.

AAM #1.8: The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

AAM #3.4: The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.

AAM #7.5: The museum takes appropriate measures to protect itself against potential risk and loss.



DIGGING DEEPER:

Recruiting and Managing Volunteers in Museums by Hoven & Wellman includes a sample interview questionnaire.

Look out for [unconscious bias](#) in the screening process. You might consider "[blind hiring](#)" measures to omit certain details as you review candidates.

Volunteer Policies & Procedures



DIGGING DEEPER:

Sample volunteer policy outlines or handbooks are available in most of the websites and books in the toolkit Resource section.

WHY? Policies communicate expectations and outline the responsibilities of both the volunteer and the museum. They also ensure that your institution acts fairly and consistently.

WHAT? Use the personnel policies already in place for paid staff (if you have them) as a starting point.

WHO? It's a good idea to collaborate with the person handling human resources duties, the staff who will be directly training and supervising volunteers, and any current volunteers you have as you create or revise volunteer policies.

Professional Standards:

AAMV # 1: The institution ensures that the volunteer program has staff support and resources needed for its success.

AAM #6.1: The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.

AAM #2.2: All aspects of the museum's operations are integrated and focused on meeting its mission.

AAM #7.5: The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.



TIP: Many museums have volunteers sign an agreement form that briefly outlines the volunteer's role and the museum's expectations—the signed original is placed into the volunteer's file. Two sample forms can be found in the appendix of *Transforming Museum Volunteering* by Hirzy.

Staff Training & Development

WHY? Staff attitude and capacity are strong factors in the success or failure of a museum volunteer program. Problems in the dynamic between staff and volunteers can derail a program. For instance, staff sometimes expect too much of volunteers and treat them as a substitute for paid personnel. Others may feel volunteers are not useful to the organization and consider orienting or training them a waste of time. Collaborating with staff in creating volunteer job descriptions and policies can mitigate these attitudes.

To help move staff attitudes about volunteers from negative or neutral to enthusiastic, and to maintain consistency as a museum, provide staff training, which could be called a nonthreatening name such as “volunteer management tips and tricks.”

This is also a chance to share with staff the data you’ve collected showing the contributions volunteers make to your museum’s mission and strategic plan, and how the organization leverages this for grants, etc. (see section 5).

WHAT? Staff training will vary from museum to museum, because volunteer roles are unique. See the table below for typical topics.

WHO? Basic staff training should be offered for all staff managing or overseeing volunteers. Ideally, every department in the museum should at least have some orientation to the volunteer program.



DIGGING DEEPER:

There is a wealth of information and sample documents about volunteer orientation and training in the online AAM Resource Library, and in the websites and books in the toolkit Resource section.



TIP: Include volunteer management or supervision in job descriptions and evaluation forms for staff. This clearly communicates that it is a normal staff responsibility and should be done well.



USE THE QUICK SELF-ASSESSMENT CHECK SHEET ON PAGE 23.

Professional Standards:

AAMV # 8: Supervision from museum staff helps volunteers to continue to learn and improve job performance while offering them the opportunity to give feedback and contribute ideas.

AAMV # 10: Evaluation of and by staff is performed.

AAM #2.5: The museum establishes measures of success and uses them to evaluate and adjust its activities.

Developing the Program

“To prevent volunteer washout, split training sessions into multiple days or sessions to cover all the important information the volunteer needs prior to starting their project. Then provide monthly meetings or trainings.”

Van Hooven & Wellman, *Recruiting and Managing Volunteers in Museums*. P.62

Volunteer Orientation & Training

WHY? Volunteers and staff alike are more successful and more satisfied when volunteers are onboarded in an intentional and deliberate manner.

WHAT? The extent of orientation volunteers need depends on what roles they are filling. For a special event, it may be enough to provide information on “creature comforts” (such as parking, restrooms, dress code, personal belongings, storage), give a facility tour, and then share and discuss dos and don’ts for the event (for example: don’t allow visitors to touch the art, do allow food and drink in the following areas...).

Repeat volunteers need more extensive orientation to understand how they fit into the big picture, what their roles and responsibilities are, and what is expected of them. In other words, they need to be set up for success.

WHO? General orientation can be led by the coordinator, the head of the volunteer committee, a senior volunteer, or human resources staff. Position-specific training may be done by one of the above persons or by the supervising staff person. All of these people should be involved in creating the orientation and training.

Professional Standards:

AAMV #5: All volunteers receive an orientation to the museum.

AAMV #6: All volunteers receive training that prepares them to perform their work to the best of their abilities.

AAM #1.4: The museum strives to be inclusive and offers opportunities for diverse participation.

AAM #1.5: The museum asserts its public service role and places education at the center.

AAM #3.2: The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.



DIGGING DEEPER:

Most of the websites and books in the toolkit Resources section also have sample policies and lists of topics to include. The AAM Sample Documents Library has sample volunteer handbooks from museums as a Tier 3 museum member benefit.



TIP: If sections of the orientation and training will be done by different people, consider creating a checklist of each section for the volunteer to take with them. Have staff and/or volunteers sign off on each section, then keep the completed checklist in the volunteer’s file.



SEE ORIENTATION & TRAINING CHECKLIST ON PAGE 26.

Evaluating Volunteers & Your Program

WHY? Evaluation is crucial to creating a top-performing team and retaining and investing in the people who contribute to it. Assessment is a vital part of any organization committed to excellence, and volunteers are no exception. Even informal assessments provide useful information and help you proactively reduce or eliminate issues.

WHAT? Assessing three aspects of museum volunteer programs will provide an overall picture of strengths and weakness:

- Individual volunteer performance
- Overall program performance in meeting volunteer needs
- Overall program performance in meeting museum needs

WHO? Involve all your stakeholders! Get feedback on individual volunteers from staff who work with them, but also ask other departments for their observations and ideas on strengthening the program in general.

Ask volunteers if the framework you've created is meeting their needs. You should also solicit ideas they have for improving the program or improving museum services, programs, and events in general. Volunteers frequently offer a fresh outside perspective that can be invaluable.

Remember that a volunteer program which is operating at its highest level treats both volunteers and staff as co-creators!



DIGGING DEEPER

Both *Recruiting and Managing Volunteers in Museums* and *Transforming Museum Volunteering* have multiple samples of evaluation forms. *Recruiting and Managing Volunteers in Museums* also includes good discussions about discipline and termination.

Professional Standards:

AAVM #9: Evaluation of and by volunteers is performed.

AAVM #10: Evaluation of and by staff is performed.

AAM #2.5: The museum establishes measures of success and uses them to evaluate and adjust its activities.

Recognition & Rewards

WHY? Recognizing and rewarding volunteers builds value, appreciation, and respect. This can improve retention, reduce turnover, and create an enjoyable work environment. It also helps remind your organization of the value volunteers contribute to the museum.

WHAT? Each museum needs to deliberately communicate recognition in both an informal and a more formal manner. What form that should take depends on the culture of the museum. Here are some ideas to consider:

Informal recognition can be as simple as a verbal thank you or a handwritten note or card. It could also be refreshments or a door prize for a meeting. For example, one museum purchased a few inexpensive potted plants for table centerpieces and ended the meeting by gifting the centerpieces to attendees who had a “lucky card” taped to the bottom of their chair.

Formal recognition & rewards can begin with National Volunteer Week (each year in the month of April). This could be as fancy as a recognition luncheon or as simple as a thank you letter from the Director and the Board President sent to all volunteers and posted on the website.

WHO? Brainstorm with staff from multiple departments, with the board, and with your friends group. Find out how other nonprofits in your area reward and recognize volunteers. Could you do a joint event?



DIGGING DEEPER

The six categories of volunteers and the case studies portrayed in *Recruiting and Managing Volunteers in Museums* by Hoven & Wellman explore volunteer motivations and needs in depth.



TIP: Use professional development opportunities for volunteer training, volunteer retention, and as a reward. See next section.



SEE RECOGNITION & REWARDS BRAINSTORMING FORM ON PAGE 26.

Professional Standards:

AAMV #11: Volunteers are recognized and appreciated for their work (commitment of time, quality/quantity of work, etc.).

Volunteer Professional Development

WHY? Professional development can be integral to building job knowledge and skills beyond the basics needed for common tasks. It can also be part of volunteer rewards and retention.

In addition to giving back to their community and making an impact, many volunteers want to learn something new. Enrichment and/or career enhancement can be an added incentive.

Professional development can also be a strategy to avoid volunteer burnout.

Just as museums help visitors find meaning in our objects and exhibits, we also need to help volunteers find meaning in their work.

WHAT? Webinars, talks, lectures, behind-the-scenes tours, regional conferences or meetings, training in new software or digital tools, and research projects on a specific topic or artifact are all examples of professional development opportunities that museums can offer their volunteers.

WHO? It takes some sleuthing to find out what is of interest to each volunteer. This process should begin with your initial interview. Other staff might collaborate with you on creating a list of opportunities that could be available to more senior volunteers.

Professional Standards:

AAMV #6: All volunteers receive training that prepares them to perform their work to the best of their abilities.

AAM #2.4: The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.



DIGGING DEEPER

The six categories of volunteers and the case studies portrayed in *Recruiting and Managing Volunteers in Museums* by Hoven & Wellman explore volunteer motivations and needs in depth.

Just as museums help visitors find meaning in our objects and exhibits, we also need to help volunteers find meaning in their work.

Supporting the Program

Communication Network

WHY? All museums share different information with different stakeholder groups. This makes it easy to assume someone knows about something that they don't. It is also far too easy to create a network that has information flowing in only one direction, often from the "top down," which rarely works well. How can you create a more functional network where information flows across, up, and down the organization?

Facilitating communication among volunteers and between volunteers and staff can be a challenge. Varied schedules, different comfort levels with technology, and limited museum space and resources all impact how communications flow within the museum.

WHAT? Communicating with volunteers is much like communicating with museum visitors—you need to employ multiple methods to reach everyone. Each museum creates a network of communication methods and tools that works for their unique situation. Analog methods could include a bulletin board, a newsletter, and a volunteer committee or council; digital tools could include email, websites, private Facebook groups, file sharing services like Dropbox, project management software like Asana, and collaboration software like Google Docs.

Be sure to use these tools for two-way communication with volunteers, not just one-way.

WHO? Take some time to think through who needs different categories of information. Don't assume; test this out with different groups and departments. Don't forget your friends group!

Questions to ask:

- Do we use at least three methods for communicating with our volunteers so that we reach everyone?
- How do we support volunteers communicating with each other?
- How do we support communication between staff and volunteers?
- How do we ensure that information flows both up and down the organization?
- Are we creating a community for our volunteers? Are they connected and engaged?

Professional Standards:

AAVM #7: Communication between staff and volunteers is effective and frequent.

AAM #3.2: The governing authority, staff and volunteers have a clear and shared understanding of their roles and responsibilities.

Record Keeping

WHY? Keeping records is essential for documenting the program's value to the museum, creating an institutional history that can help inform future decisions, and reducing risks (see next section).

For example, tracking volunteer hours can measure community commitment, one of the most important assets a museum can have. These statistics are tangible evidence of the contribution volunteers make to the museum's mission and operation to share with the staff and board. They can also often satisfy grants that require in-kind contributions.

Records can also, over time, create a picture of volunteer demographics at your museum, and support conversations about expanding or diversifying recruitment efforts and increasing volunteer opportunities in other departments.

Additionally, a museum may receive requests for references regarding a volunteer. Documenting volunteer service and performance ensures that the reference will be based on objective documents rather than on memory.

WHAT?

- Documentation of the hiring, training, and assessment of each volunteer.
- Records of volunteer hours for individuals and for the program overall, as well as specific projects, events, and/or departments.
- Records of volunteer demographics, such as age bracket, recruitment method, length of service to the museum, and typical responsibilities.

You can track this data in a binder, on a computer spreadsheet, or on a purchased computerized volunteer management program.

WHO? Discuss with volunteers and their supervisors to determine the most efficient way to record and collect raw data. How you will collect, analyze, and report the raw data depends on whether or not your program has a coordinator and whether your museum can purchase software.



DIGGING DEEPER

This [video by PastPerfect](#) shows you how to use the software to track volunteer hours. And, [this article](#), while written in 2011, has some reviews to consult and useful criteria to consider as you shop for software.



TIP: Independent Sector calculates the current value of an hour of volunteer time each year. Go to [their website](#) for this year's value.

Professional Standards:

AAM # 12: Accurate records are kept to show the scope and breadth of the volunteer involvement in the life of the institution.

AAM #7.5: The museum takes appropriate measures to protect itself against potential risk and loss.

AAM #1.8: The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

Risk Management

WHY? Crises or plot twists will invariably come your way from time to time, and anticipating this can help prevent them or reduce their impact. Volunteers can be an unknown “wild card” if not properly screened, trained, supervised, and evaluated.

WHAT? Create a coordinated and unified set of policies that proactively identify and minimize potential risks.

These policies should include how you write your volunteer job descriptions, what you cover in orientation and training, whether or not your museum performs background checks, and how you supervise volunteers, all of which can increase or reduce your museum’s risk exposure.

WHO? Use the list below to help you brainstorm every person at your institution who should be involved in crafting policies and procedures that reduce risk to your organization.

Common museum volunteer program risks:

- Damage to or theft of collections
- Damage to or theft of equipment
- Injury to visitors, staff, or volunteers
- Damage to facility
- Embezzlement or misuse of funds
- Abuse
- Violation of confidentiality
- Misrepresentation of the institution
- Inappropriate termination



DIGGING DEEPER

The book *Transforming Museum Volunteering* has an excellent chapter on risk management. [This article](#) from *Nonprofit Quarterly* has practical suggestions.

One worthy thing to discuss is whether to ever consider paying a volunteer, or to ask a museum staff person to volunteer. [This article](#) from the Non-profit Risk Management Center explores those issues.



USE THE QUICK SELF-ASSESSMENT FORM ON PAGE 25 TO DISCUSS THE FIVE KEY AREAS OF RISK AT YOUR MUSEUM.

Professional Standards:

AAVM #13: Risk management is in place.

AAM #7.5: The museum takes appropriate measures to protect itself against potential risk and loss.

AAM #1.8: The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

Budget

WHY? It's important to know the true cost as well as the true value of your volunteer program, so that administration can provide realistic support. It's also best to have this information ready for potential grants, donors, and funders, so that you can quickly communicate the actual amount of money you need to support your program.

WHAT? A basic budget should include all program costs for applicant screening, marketing, equipment, software, supplies, recognition, training materials, communication methods, postage, room rental, and any other direct expenses.

Salaries for staff, such as a program coordinator, should also be part of the budget. A more involved budget could also include staff time to train and supervise volunteers.

WHO? Don't forget to survey everyone involved in your program to ensure you are including all costs.



DIGGING DEEPER

[This article](#) from Brilliant Idea Studio includes a helpful template to analyze docent program costs and benefits, which you could also use to analyze an overall volunteer program.

Professional Standards:

AAVM #1: The institution ensures that the volunteer program has staff support and resources needed for its success.

AAM #6.1: The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.

AAM #6.2: The museum operates in a fiscally responsible manner that promotes its long-term sustainability

Summary

It takes time, energy, and resources to create a successful and well-conceived volunteer program. Analyzing your current infrastructure and selecting areas to strengthen isn't easy, but it will help you celebrate your assets and formulate a strategy to create others. Building a solid foundation now will ensure that your program can withstand a crisis or seize the moment to take advantage of an unexpected opportunity.

Appendices

Additional Resources

[Transforming Museum Volunteers](#)

This very comprehensive book has strategies, tips, questions to consider, and a large appendix with sample documents and forms. Published by the American Association for Museum Volunteers (AAMV), it's aligned with that organization's Best Practices for Volunteer Programs.

[Recruiting and Managing Volunteers in Museums](#)

This book explores topics like the six groups of volunteers in today's society, motivations of current volunteers, and how to manage contemporary types such as electronic volunteers and family volunteers. Case studies with lessons and questions to ponder enrich the content.

Organizations and Websites

[American Alliance of Museums](#)

AAM has a blog, articles, webinars, and sample forms and documents related to many of the topics in this toolkit. (Some are available to the general public; some are accessible via different membership levels). For more information about which level of AAM membership is right for you, please visit our website at: www.aam-us.org/programs/membership/.

AAM and AAMV jointly hosted a series of webinars exploring different aspects of volunteer management. These are located [here](#).

AAM also hosts [Museum Junction](#), a free online discussion forum for museum professionals. Create a free log-in and then post a question to your museum colleagues or search the archives for volunteer-related discussions.

American Association for Museum Volunteers

In 2011, AAMV established National Best Practices for Museum Volunteer Programs, which are referenced frequently in this toolkit and can be [viewed online](#). Their book, *Transforming Museum Volunteering* (see above), and their webinars are also excellent. The AAMV also offers members-only sample forms and other resources.

National Docent Symposium Council

This organization has published a handbook, [Docent Handbook 2](#), and hosts an annual conference. Their website has free resources and useful articles exploring docent and interpretation-related topics.

Sustaining Places

This website from the University of Delaware Museum Studies program is an excellent resource for small museums and historic sites. The section on volunteer and internship programs has links to policies, handbooks, and sample documents created by museums, as well as thought-provoking articles.

Essex Museum Volunteer Toolkit

This is a narrowly focused toolkit with good sample forms and helpful information on doing a skills audit. (A skills audit helps a museum assess volunteer skills and determine which skills are needed for a project or position).

Legal and Illegal Interview Questions

This list explains and gives examples of legal and illegal questions in interviews, which apply to both volunteer and staff positions.

Sterling Volunteers

This organization's blog posts, white papers, and reports are all helpful resources, and most are free even if you do not purchase their services.

Interview Process Self-Assessment Form

Interview Process	What we do well now	How we could do more	What we would need in order to do more
What are the volunteer's expectations and preferences?			
What skills/aptitudes do they have?			
What prior experiences have they had?			
What skills or aptitudes do we need?			
What time frames do we need?			
What is the volunteer's availability?			

Typical Policies Checklist

Policy	We have for staff	We have for volunteers
Position descriptions		
Recruitment policies		
Benefits offered		
Application & interview process		
Orientation & training		
Placement policy		
Supervision		
Dress code		
Confidentiality		
Attendance		
Record keeping requirements (for volunteers and staff)		
Security policies		
Resignation procedure		
Disciplinary procedure		
Dismissal policy		
Diversity statement		
Workplace harassment statement		
Conflict of interest policy		

Orientation Self-Assessment Form

Staff Orientation or Training	What we do well now	How we could do more	What we would need in order to do more
Volunteer program goals & contributions to your museum			
Adult learning styles & communication styles			
How to determine & communicate expectations			
How to give feedback			
How to listen & observe behaviors for cues			
How to recognize & reward			
What to document			
When to get help			

Orientation and Training Checklist

	We do this well	We do this somewhat	We don't do this
Facilities tour			
Welcome letter from Director & Board President			
Orientation to museum history, mission and future plans			
Introduction to staff			
General policies and procedures			
Emergency procedures			
Communication procedures			
Scheduling			
Evaluation & feedback structure			
Job-specific training			

Recognition & Rewards Brainstorming Form

	What we do well now	How we could do more	What we would need in order to do more
Informal recognition			
Formal recognition			

Risk Management Self-Assessment Form

Type of Risk	What we do well now	How we could do more	What we would need in order to do more
People			
Collections			
Buildings			
Income			
Goodwill			

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