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# Volunteers in Museums: Are Small Museums Utilizing Volunteer Management Policies?

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VOLUNTEERS IN MUSEUMS:  
ARE SMALL MUSEUMS UTILIZING VOLUNTEER MANAGEMENT POLICIES?

by

Tabetha A. Debo

B.A., Truman State University, 2011

A Research Paper  
Submitted in Partial Fulfillment of the Requirements for the  
Master of Public Administration

Department of Political Science  
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MPA RESEARCH PAPER APPROVAL

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A Research Paper Submitted in Partial  
Fulfillment of the Requirements  
for the Degree of  
Master of Public Administration  
in the field of Museum Administration

Approved by:

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## AN ABSTRACT OF THE RESEARCH PAPER OF

Tabetha A. Debo, for the Master of Public Administration degree in Museum Administration, presented on April 9, 2013, at Southern Illinois University Carbondale.

TITLE: VOLUNTEERS IN MUSEUMS: ARE SMALL MUSEUMS UTILIZING VOLUNTEER MANAGEMENT POLICIES?

MAJOR PROFESSOR: Dr. Dona Bachman

Volunteers are an asset to any museum. Having written volunteer management policies and procedures for museums can greatly increase the effective use of volunteers within a museum. This paper attempts to answer this question: Do small museums, which are most likely to need volunteers due to lack of paid staff and overall funding, utilize written volunteer management policies and procedures, and are these policies and procedures effective? To answer this question, survey results of four Southern Illinois region museums are analyzed. Two of the museums did have volunteer management policies and procedures, but did not necessarily exhaust all possible topics of volunteer management. The other two museums did not have written volunteer management policies and procedures, and the volunteer coordinators were unclear of the tangible benefits that a written volunteer management plan can have for a museum, its staff, its patrons, and the community it serves.

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## CHAPTER 1

### INTRODUCTION

“Volunteers are vital to the life of many museums, especially those operated by nonprofit or charitable organizations” (Lord & Lord, 2009, p. 44). There are more than 17,500 museums in the United States, over two-thirds of which are nonprofit organizations (AAM, 2013; Merrit & Katz, 2012). Working alongside paid staff, volunteers help to further the mission of the museum, as well as connecting with the community. Volunteers can assist in a variety of roles throughout the museum, including docents, interns, interpreters, and board or trustee members. According to Kuyper, Hirzy, and Huftalen (1993), a 1989 survey by the American Association of Museums (now the American Alliance of Museums) found more than 375,000 people volunteering in museums. This large number of volunteers outnumbered paid staff three to one (Glaser & Zeneto, 1996). Currently, museum volunteers supply one million hours of their services each week (AAM, 2013).

Grossman and Furano (1999) explain that volunteerism is in transition.

Volunteers are taking on more complex jobs and projects at institutions, serving more staff-like roles than simply “supplementing and supporting the efforts of paid staff members” (p. 201). Paid staff can be full- or part-time staff. However, there are museums that lack any paid staff. In these cases, and for the purposes of this paper, the term “paid staff” will refer to the volunteers that have taken on much of the responsibility of the museum, and are invested most in the museum’s mission.

Volunteers are working on tasks that are more complex and working more independently than in previous years, and many organizations—museums included—

are finding that issues concerning paid staff concern volunteer management as well. Organizations find that issues such as working conditions and training also apply to volunteers (Grossman & Furano, 1999). Based on the complex roles volunteers are assuming, they have become vital resources within the museum community.

Limited funding for museums to oversee day-to-day operations leads to an increase on the reliance of volunteers within museums. Smaller museums, often defined as having five or fewer full-time staff running the museum, often rely heavily on volunteers (Catlin-Legutko & Klingler, 2012). Literature on museum volunteers stresses the need for written volunteer management policies and procedures for museums to utilize volunteers effectively. This paper attempts to answer this question: Do small museums, which are most likely to need volunteers due to lack of paid staff and overall funding, utilize written volunteer management policies and procedures, and are these policies and procedures effective? After a review of the literature, this paper looks at the survey results from four small museums in Southern Illinois concerning their use of volunteers and any volunteer management policies and procedures.

## CHAPTER 2

### LITERATURE REVIEW

Since museums vary in size and structure, there may not be a volunteer coordinator dedicated to overseeing unpaid staff. However, there should be a volunteer program housed within another department if it is not freestanding (Hirzy, 2007), with at least one administrator heading the volunteer program (Lord & Lord, 2009). The administrator, as a paid staff member or volunteer, offers “continuity, direction and momentum in the program, serves the center for volunteer administrative tasks, and is the catalyst for assessment and planning” (Kuyper et al., 1993, p. 30). The volunteer coordinator’s numerous responsibilities to the museum, volunteers, and the community heighten the need for written policies and procedures concerning volunteer management. Volunteer management policies and procedures should focus on treating volunteers as paid staff, with recruitment plans, job descriptions, training, recognition, evaluation, retention, and risk management plans. Understanding the importance of each topic within a volunteer management plan allows the volunteer manager to recruit, retain, and effectively utilize volunteers within the museum.

The volunteer program will vary among museums. Some museums focus on a single volunteer coordinator to create the written policies and procedures. Other museums, especially small ones with little or no paid staff members, may have a single volunteer coordinator, and the written volunteer policies and procedures may be created by a committee consisting of board members and staff members. Additionally, museums may adopt written volunteer policies and procedures from professional associations, such as the American Association for Museum Volunteers, or from other

museums that have written policies and procedures that they are willing to share. In any case, the board of directors or trustees, the museum director, and the volunteer coordinator should meet and agree on the written policies and procedures for volunteer management. Paid employees who will be working with volunteers should also be informed of the volunteer policies and procedures (Hall, 1995). By informing paid staff of the volunteer policies and procedures, all staff at the museum will be more able to work together to achieve the museum's mission.

### **Recruitment**

For any position, employers use recruitment plans to attract talented and dedicated applicants. Museums recruiting volunteers face a larger challenge because they must present a job opportunity that does not offer monetary benefits. Therefore, a volunteer program coordinator must recruit volunteers by "building awareness, creating a positive perception, and providing information about the museum's volunteer opportunities and benefits" (Hirzy, 2007, p. 38). A strong set of recruitment goals includes information about what type of volunteers to recruit, what values the museum gives to volunteers, what types of volunteer opportunities are available, and what benefits volunteers will receive (Hirzy, 2007). These goals should be written in the museum's strategic plan, as well as in both employee and volunteer handbooks. When a museum has these goals, then it can more effectively recruit volunteers.

### **Trends in Volunteering**

When deciding what types of volunteer opportunities are available and what types of volunteers the museum wishes to recruit, the museum must recognize the

current trends in volunteering. The “traditional” volunteer was a married woman who was unemployed (Kuyper et al., 1993, p. 43). Over the last few decades, however, this trend has changed due to “new understandings of aging, work, and retirement” and a growing population of retirees, which are “reshaping perceptions of volunteering” (Hirzy, 2007, p 14). Volunteering trends have evolved to include “men and women of all ages and socioeconomic and ethnic backgrounds, from retired people to high school students to business executives” (Kuyper et al., 1993, p. 43). A report by the Grantmaker Forum on Community and National Service states, “the 21<sup>st</sup>-century volunteer is more likely to be employed, have professional skills to share, have a limited amount of time available and have greater need for immediate gratification” (as cited in Hirzy, 2007, p. 15).

With such a potentially large and varied pool of volunteer applicants, museums must review its available opportunities to fit the likely skills, expertise, wants, and needs of such volunteers. Volunteer coordinators can find information on trends in volunteering from in-house surveys and statistics for information specific to their own museum, or through surveys conducted by professional associations concerning volunteers and labor statistics for more general information, such as the U.S. Department of Labor Bureau of Labor Statistics and the Corporation for National and Community Service (Hirzy, 2007).

Age is an important factor in determining the wants of volunteers. Hirzy (2007) points out that baby boomers, people born in the late 1940s through 1960, are now 50-60 years of age and are more likely to want volunteer opportunities with a large amount of responsibility, allowing paid staff to treat them like colleagues. Those people that are a part of Generation X, born in the 1960s and 1970s and now turning 40 years old, like

volunteer opportunities that offer a challenge and a way to socialize. Finally, teens, mostly between the ages of 14-18 are another category of volunteers. Teens are most likely to apply for volunteer opportunities that offer work experience and other professional skills. Teens use these opportunities to gain experiences for college and job applications (Hirzy, 2007). Teen volunteers are likely to continue their volunteer trends into their early twenties, using the skills gained during their volunteer experiences to apply to graduate programs and professional jobs.

### **Job Descriptions**

To recruit the desired volunteer applicants, volunteer coordinators must treat volunteers as they would treat paid staff (Lord & Lord, 2009). This inclusion starts with written job descriptions. Hirzy (2007) suggests, "Well-crafted job descriptions are the foundation for recruitment, selection, training, and evaluation" (p. 24). Job descriptions allow volunteers to know what is expected of them, how much responsibility they will have, and what skills or knowledge they need to apply for the position. Additionally, job descriptions allow the museum to match volunteers to the right opportunities, which ensures that both the volunteer and the museum will be more likely to work together successfully. Museums can use volunteer job descriptions as a marketing tool to recruit new volunteers, as the description should offer all of the information needed to apply (Hirzy, 2007).

### **Training**

Training is another way for the volunteer coordinator to treat volunteers like other paid staff. Training not only "communicate[s] information and teach[es] skills" needed to

complete volunteer tasks effectively, but it allows the museum to invest in the volunteer, as well as for the volunteer to invest in the museum (Hirzy, 2007, p. 45). By investing in the volunteer, the museum obtains an enthusiastic volunteer and creates a bond with the community, which can increase the number of people that wish to volunteer in the future.

Kuyper et al. (1993) suggest that there are four types of training that museums generally offer their new volunteers: orientation, to introduce the volunteer to the museum and its staff; general training, to introduce an in-depth look at the museum's mission and the volunteers' roles and responsibilities; specialized training, or formal training in specific subjects to allow volunteers to accomplish their tasks; and advanced training, allowing experienced volunteers to continue to enhance skills and knowledge. Museums that offer new and long-term volunteers these types of training will have a more knowledgeable volunteer base and a positive relationship with the community.

Effective training can also aid in the recruitment of new volunteers. Volunteers invested in and enthusiastic about their responsibilities with the museum are likely to communicate their feelings with other community members, thus allowing for indirect recruitment measures. Additionally, Grossman and Furano (1999) show that volunteer retention can be increased through effective training, stating that volunteer involvement increases with "volunteers who received more hours of formal training at the beginning" of their volunteer employment with the museum (p. 206).

Hirzy (2007) stresses the need for effective training program designs. She states that training should focus on four areas. The first of these areas is attitudes. Through training, volunteer commitment to and enthusiasm for the museum should increase, and

the museum should explain its standard practices for customer service when volunteers interact with museum visitors. The second area, relationships, uses training to build teamwork among volunteers and between volunteers and paid staff. Training also establishes the expectations of the volunteers as the third area. By stating what is expected of volunteers in terms of performance, the volunteers know what is expected of them, and the museum can therefore hold volunteers accountable for their work, including attendance in adherence of volunteer time commitments. Finally, the fourth area is knowledge and skills. This area allows the volunteer to “get to know the museum, the volunteer program, and the work he/she will be doing. Training in the knowledge and skills of the museum also teaches specific job-related skills and builds individuals’ confidence in their abilities” (Hirzy, 2007, p. 46).

### **Volunteer handbook**

The final piece to an effective training program is the volunteer handbook or volunteer manual. Introduced to the volunteer during training, the volunteer handbook has information concerning the museum that is useful to the volunteer. According to the American Association for Museum Volunteers’ “Standards and Best Practices for Museum Volunteer Programs” (2012), available on their website, the handbook should be given to the volunteers during orientation, and should include at minimum:

- Mission Statement – Introduction to the institution, goals of the volunteer program, introduction to the president and staff, etc.
- Background Information – History of museum, map, frequently asked questions, etc.

- General Information – Transportation, important museum contact information, benefits (discounts on parking, cafeteria and gift store purchases, free admission to the institution, etc.)
- Procedures/Rules & Responsibilities – Dress code, professional behavior, emergency procedures, etc.

By providing these topics, and more as the volunteer coordinator sees fit when creating a handbook given to volunteers, the volunteers have a reference to check any time they are not sure about an aspect of the museum or its operations. Since volunteers should be held to the same standards as the museum's paid staff, the last section of the volunteer handbook, the procedures, rules, and responsibilities should be considered the most important. Ester Hall (1995) states, "Volunteers need to be subject to and aware of standard operating procedures and policies" of the museum (p. 2). The handbook offers the volunteers information on what it means to be professional within the museum setting, so that volunteers may be held to the same standards as the museum's paid employees. The volunteer handbook should include policies and procedures for all museum staff, including dress code, grievance procedures, the code of ethics, harassment policies, and time commitment and attendance, to name a few.

### **Staff and Volunteer Relations**

Volunteers are not the only people that the volunteer coordinator must train and oversee. These coordinators must also train and manage the paid staff that works directly with the volunteers. Paid staff and volunteers need to work in roles that complement each other (Hirzy, 2007). By working in mutually supportive roles, the

volunteer understands the work of the paid staff member, and the staff member values the help and work of the volunteer.

If poorly managed and trained, tensions can arise between paid employees and volunteers, which can cause competition between the groups and cause them to work at cross-purposes (Hirzy, 2007). Kuyper et al. (1993) state, “volunteers and paid staff need to understand the organizational climate or climates in which they work” in order to build a positive relationship and work together (p. 73). The museum must stress open communication and mutual respect between paid and volunteer staff to keep tensions low and cooperation high.

Hirzy (2007) elaborates on three characteristics to create a collegial and cooperative relationship between the paid and volunteer staff members. The first characteristic is an empowered staff. If paid employees feel invested in the volunteer program, then they are more likely to encourage the use of volunteers and facilitate a positive relationship between the paid staff and the volunteers. By involving paid staff in the planning and job designs for volunteers, as well as selecting and training volunteers, paid staff can see how volunteers can fit seamlessly into their daily work (Hirzy, 2007). Paid staff should help to train volunteers in the orientation and other training sessions to show how valuable the volunteers are to the work that paid staff does as well. Additionally, paid staff must be trained in supervising and working with volunteers, so that expectations and accountability are delineated and clear.

The second characteristic is an increase in teamwork. If a museum can reduce the boundaries between volunteers and paid employees, then teamwork can flourish. Since paid staff and volunteers should have complementary roles—working to

accomplish the overall mission of the museum—the entire team needs to understand what the specific roles are. Consultant Marry Merrill says, “teamwork is fostered when expectations are clear, individuals are accountable, and all members of the team are recognized for their unique contributions” (as cited in Hirzy, 2007, p. 34). Teamwork can be encouraged if paid staff attend volunteer orientation and training sessions, as expectations for both volunteers and paid staff should be explained in volunteer training.

The last characteristic is shared stories. “Recognition of the shared accomplishments instills a sense of pride and a collaborative spirit” in both paid staff and volunteers (Hirzy, 2007, p. 34). Stories of volunteer accomplishments can be a feature on the museum’s website or newsletters—allowing the whole community to see the accomplishments of the volunteers.

Many of the issues that arise between paid staff and volunteers come from the lack of training given to the staff concerning volunteer supervision and working with the volunteers. While training for volunteers focuses mostly on introducing the volunteer to the museum’s mission, rules, and regulations, the training for paid staff often does not cover volunteer involvement. If adequate training is not offered to paid staff, then staff may be unsure how to properly supervise and mentor volunteers (Grossman & Furano, 1999). Therefore, all paid staff should receive training on how to work as a team with volunteers, as well as how to supervise and mentor volunteers. Training paid staff to work well with volunteers and to properly supervise them can help the volunteer program flourish at any museum.

Kuyper et al. (1993) stresses the need for training to facilitate the positive teamwork between paid staff and volunteers. Paid staff should receive training in all of

the aspects of the museum's volunteer program. By understanding the system of planning for, recruiting, selecting, training, evaluating, and recognizing volunteers, paid staff will better understand why volunteers are placed with certain people to help with certain projects. Additionally, paid staff must be trained in management issues, such as organizational culture, management styles, the importance of two-way communication, and professional practices (Kuyper et al., 1993). Just as with the volunteer training, training for paid staff "should never become static but should continue to evolve along with the volunteer program" (Kuyper et al., 1993, p. 78).

### **Recognition and Reward**

While altruism and résumé building are often motivators for why many people volunteer, a museum cannot rely solely on these characteristics as sources for continuing the motivation in volunteers. Museums must focus on recognizing volunteers for the time and effort they give to the museum by understanding and offering rewards. The volunteer coordinator as well as the paid staff working with the volunteers should undertake this recognition. By showing appreciation to the volunteers, volunteers are likely to see that they are a valued asset to the museum, and the museum is likely to keep volunteer retention rates high.

Volunteer recognition can occur in varying degrees, from one-on-one to a more formalized museum-wide acknowledgement of their assistance. When making simple gestures of volunteer recognition, such as asking about a volunteer's life or thanking him or her for his or her time and effort at the museum, volunteer coordinators and other museum staff "help build a positive working climate and a community of dedicated

volunteers who feel connected to the museum, its visitors, and their staff and volunteer colleagues. This supportive atmosphere fosters the sense of personal belonging and ownership that is the greatest reward of volunteering” (Hirzy, 2007, pp. 51-52). While it is quite informal, actively communicating and creating a welcoming environment for volunteers shows that the museum is recognizing the volunteers and the work they do (Kuyper et al., 1993).

Additionally, Kuyper et al. (1993), stresses the importance of having a recognition plan concerning volunteers. The plan should begin with training the paid staff to recognize the work that volunteers do, and how to show their appreciation for the volunteers. Some suggestions for recognition include sending an initial welcoming letter to new volunteers; verbally thanking a volunteer for a job well-done; recognizing a “volunteer of the month”; holding an annual banquet or volunteer appreciation day; and announcing volunteers’ birthdays (p. 70). The expense of recognizing volunteers can be very minimal, as with a thank you letter, or more costly, as with an annual volunteer-appreciation banquet. Recognition efforts can be tailored to fit the resources of the specific museum.

In addition to recognizing volunteers for the time and effort they offer to the museum, volunteer coordinators and other staff must be aware of the rewards that volunteers can receive. Since volunteers work for little or no money, a museum should focus on rewards or benefits it can offer to its volunteers. Kuyper et al. (1993) suggest that, in addition to having a recognition plan, volunteer coordinators should also have a plan for rewards and benefits offered to volunteers. Some reward suggestions include offering volunteers free museum catalogues, previews to special exhibitions, discounts

on memberships and in the museum store, free or discounted admission to other public events held by the museum (such as lectures, films, and concerts), volunteer social events, and special courses and lectures for volunteers only. Rewards and benefits like these allow volunteers to know that they are appreciated and valued by the museum and its staff.

### **Evaluation and Retention**

“Evaluation is an invaluable element in the success and vitality of a museum volunteer program” (Kuyper et al., 1993, p. 83). The data and information collected in an evaluation allows the museum and its staff to judge the successfulness of the volunteers, the volunteer program, and the museum itself. It is important for the volunteer coordinator to evaluate the volunteers, the volunteer program at the museum, and the paid staff that are working with volunteers. By evaluating each aspect of the volunteering experience, the volunteer coordinator can see where volunteers and paid staff are successful, and where improvements might be made. Successful evaluations with constructive critiques can even increase the length that volunteers stay with a museum. When evaluating individual volunteers, it is important to refer to the written job descriptions and training offered to the volunteers as the basis for the evaluations.

#### **Volunteer Evaluation**

Museums should evaluate volunteers not only to assess the effectiveness of the volunteer on a specific project, but also to help the volunteers learn and improve. Kuyper et al. (1993) suggests that the “constructive feedback a volunteer receives stimulates learning and improvement, recognizes achievement, and enhances both the

volunteer's experience and the museum's public service" (p. 83). Since performance evaluations sometimes have a reputation of being too critical or too much like a paid job, it is important that a volunteer be given an opportunity for an informal, self-evaluation before an annual, formal evaluation by the volunteer coordinator or immediate supervisor is conducted (Hirzy, 2007; Kuyper et al., 1993). The self-evaluation allows the volunteer to think about his or her performance—thinking carefully about what he or she has accomplished and on what he or she could make improvements. Additionally, it allows the volunteer to see if the job has fulfilled his or her expectations (Hirzy, 2007).

The volunteer coordinator and immediate supervisor should also evaluate the volunteer in formal, individual sessions (Hirzy, 2007; Kuyper et al., 1993). These evaluations should occur annually, and at the end of any large projects. To ensure objective evaluation from paid staff, training should be provided to all those working with and supervising volunteers. A performance review should include 1) a discussion of the volunteer's accomplishments and areas for improvement; 2) a discussion of the future work of the volunteer; and 3) constructive feedback from the volunteer concerning working conditions, management styles, training effectiveness, and work on specific projects (Kuyper et al., 1993).

Informal evaluations, whether self- or supervisor-based evaluations, and general feedback should be conducted on a regular basis to gain information on the effectiveness of volunteers as well as the effectiveness of the volunteers' projects. Ongoing evaluations will allow for open, two-way communication and teamwork. Additionally, if a volunteer should choose to no longer work at a museum, then an exit

interview and overall evaluation should be conducted (Hirzy, 2007). This interview can be useful in bringing the relationship between the volunteer and the museum to a “satisfying conclusion, leaving the volunteer feeling respected and appreciated” (Hirzy, 2007, p. 60). The exit interview can also allow the volunteer coordinator to make improvements for future volunteers based on the feedback of the former volunteer.

### **Volunteer Program Evaluation**

“Ongoing evaluations of a volunteer program is a healthy process of reflection, revitalization, and renewal” (Hirzy, 2007, p. 58). By stepping back and looking at the program’s effectiveness in achieving the mission of the museum, the volunteer coordinator, along with other authority figures of the museum (such as the director) and paid staff that work with volunteers can see what areas need to be focused on for improvement. Because of the importance of evaluating the volunteer program, “the mission, goals, and objectives of the volunteer program [as well as the museum’s general mission and goals] are the starting points for a program evaluation” (Kuyper et al., 1993, p. 89). When conducting evaluations of the volunteer program, the evaluation can be formal—either in-house or contracted out with a private evaluation firm—to look at specific aspects of the program, or the evaluation can be informal through active listening to the assessments of paid staff, volunteers, and museum patrons (Hirzy, 2007).

### **Volunteer Termination**

Evaluations can also show if there has been an improper fit of the volunteer in a certain area in the museum, or more specifically, with a certain project or management style. When a poor fit is identified, corrective action should be taken (Driggers &

Dumas, 2011). Corrective actions should start with the volunteer coordinator talking with and listening to the volunteer and the volunteer's supervisor, and then finding the proper facts (Driggers & Dumas, 2011). Often times, the volunteer can be moved to another project, relocated under a different supervisor, or moved to a different area of the museum to allow the museum to better utilize the skills and talents of the volunteer. However, due to the specific reasons for a volunteer's poor evaluation and/or poor fit with the tasks given to the volunteer, a volunteer may need to be terminated.

Hirzy (2007) notes that "careful screening and placement will reduce problems with difficult or unproductive volunteers, and regular feedback [and recognition] will help find solutions before problems become serious...it is sometimes necessary to dismiss a volunteer" (p. 61). Just as paid staff will be terminated through the human resources department if he or she violates any standard procedures or fails to competently complete the tasks delineated in his or her job description, a volunteer also may be terminated if he or she violates procedures or fails to complete job tasks (Driggers & Dumas, 2011). The volunteer coordinator should be the one to terminate the volunteer's employment, following the same procedures as the human resources department would with a paid staff member. It would behoove the volunteer coordinator to work with the human resources department within the museum when terminating a volunteer's employment.

The volunteer handbook should be used to make decisions concerning termination. With clear job descriptions, well-described standard operating procedures and policies, and delineated expectations for completing tasks and working with paid employees, a volunteer handbook is the main reference for describing what the

volunteer is expected to do, and how the museum, specifically the volunteer coordinator, will react to adverse behaviors. Hirzy (2007) states, “the best volunteers respect policies and procedures, believe in professional standards, and welcome feedback on their work” (p. 61). The handbook easily describes each of these topics, and allows the volunteer to reach full potential within the museum. If the volunteer cannot work well within the museum, then his or her voluntary employment must be terminated.

### **Risk Management**

Risks exist in all situations, all professions, and within all organizations—museums included. Hirzy (2007) states that there are four types of assets that are at risk within the museum: 1) People—the visitors, staff, volunteers, and board members involved with the museum; 2) Collections and facilities; 3) Income and funding; and 4) Goodwill—the museum’s reputation and stature, and the museum’s appeal to donors, volunteers, and the community (p. 64). To prevent or reduce the impact of the possible risks within the museum, risk management is need. Risk management is the continuous process of assessing possible risks and attempting to prevent the risk or the damage caused by the risk (Hirzy, 2007). The Nonprofit Risk Management Center (as cited in Hirzy, 2007, p. 64) uses three questions to explain risk management:

- What can go wrong?
- What will we do (both to prevent the harm from occurring and in the aftermath of an incident)?
- If something happens, how will we pay for it?

To answer these questions in general museum operations and in project-specific situations means creating a risk management plan. A museum's volunteer program needs to have a risk management plan as well, as reflected in the volunteer handbook.

The volunteer coordinator should be involved in creating risk management plans for the museum as a whole to determine the impact the plans will have on museum volunteers as well as the volunteer program (Hirzy, 2007). There is a variety of risk management plans. One type of risk management is the crisis management plan. A museum crisis "relates to events that have a negative impact on the museum and its mission" (Hirzy, 2007, p. 64). This can range from natural disasters, to the sudden departure of the CEO, to a funding or managerial crisis. Volunteers and the volunteer program can be greatly affected by a crisis, but a plan can help ease transition when the crisis is averted.

Liability issues are also a possible risk, as museums are legally responsible for the "behavior of anyone who acts on its behalf—including employees, board members, and volunteers" (Hirzy, 2007, p. 64). To help volunteers and the museum as a whole avoid legal trouble, the volunteer coordinator must fully inform volunteers of the museum's volunteer risk management plan. The plan should include the possible risks involved in volunteering, the responsibilities and limitations of volunteers, and the risk management plan of the museum.

Additionally, the volunteer handbook should include information on what the volunteers' rights are under the federal Volunteer Protection Act (VPA) of 1997, which "provides that, if a volunteer meets certain criteria, he or she shall not be liable for simple negligence while acting on behalf of a nonprofit or governmental organization"

(NRMC, 2013). However, the VPA does not “protect a volunteer from liability for harm ‘caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer action’” (NRMC, 2013). The volunteer handbook should include any state and local volunteer protection laws as well.

Making risk management a topic of training and constant communication will help reduce the risks presented to volunteers. Museums and volunteer coordinators need to include a section on ethics as well—just as in a paid employee handbook. Ethics affects trustees and staff of a museum, and is “intended to avoid conflicts of interest and to respect relevant international conventions and national, state, provincial, or local laws pertinent to artifacts, specimens, or works of art” (Lord & Lord, 2009, p. 300). The International Council of Museums (ICOM) offers an eight-item checklist of ethical concerns that should be included in a museum’s code of ethics:

1. Museums preserve, interpret and promote the natural and cultural inheritance of humanity
2. Museums that maintain collections hold them in trust for the benefit of society and its development
3. Museums hold primary evidence for establishing and furthering knowledge
4. Museums provide opportunities for the appreciation, understanding and promotion of the natural and cultural heritage
5. Museums hold resources that provide opportunities for other public services and benefits
6. Museums work in close collaboration with the communities from which their collections originate as well as those they serve
7. Museums operate in a legal manner
8. Museums operate in a professional manner

(ICOM, 2012)

The ethics code must allow museum professionals and volunteers to advance the mission of the museum without conflicted interests or legal issues. The code of ethics

concerns all staff of the museum—paid employees and volunteer staff alike—and should be given to each employee in the correlating handbook.

Holding the volunteers to the same standards as paid staff, the volunteer coordinator should give documented warnings to any volunteer who has acted unethically or broken any laws, putting the museum at risk, which may lead to a volunteer's dismissal if warranted (Hirzy, 2007). While it is in the best interest of a museum to purchase some sort of liability insurance for volunteers in the event of an unfortunate risk, having insurance does not constitute risk management alone—since it does not actively prevent risk, but only covers possible damages in the aftermath (Kuyper et al., 1993; Hirzy, 2007). Insurance for volunteers might include: 1) liability for injury while working at the museums; 2) liability when the volunteer is using his or her own vehicle for museum work; 3) liability for the museum concerning volunteers who handle money; liability of the museum for fundraising practices by volunteer organizations; and 4) liability if a third party is injured because of actions by a volunteer (Kuyper et al., 1993).

## CHAPTER 3

### METHODS

In order to determine if small museums utilize any volunteer management policies and procedures, seven museums in the Southern Illinois region were asked to complete a qualitative survey—four of which responded. The seven museums were preselected based on the likeliness of their response to the survey. The online survey, distributed by email, consisted of six demographic questions, as well as questions concerning the use of volunteers and of any written volunteer management policies and procedures. All responses were kept anonymous so that any negative results would not damage the reputation of the specific museum.

For the purposes of this study, a small museum was defined as having five or fewer paid staff members working in the museum. Each museum had four or fewer paid employees. To be able to compare the museum's responses with one another, the museums chosen for the survey were all from a similar geographic region—Southern Illinois. The Southern Illinois region was defined as the 28 lower counties, south of I-64, that are part of the Southern Illinois Association of Museums (SIAM, 2012). Based on the size, each museum was expected to use volunteers and to find volunteers essential to the success of the museums. These results were confirmed through the survey.

The volunteer-related questions that this research sought to answer was: Do small museums utilize written volunteer management policies and procedures, and are these policies and procedures effective? As such, one survey question was essential in finding an answer to this question: Does the museum have any written volunteer management policies or procedures? Museums were then asked to describe their

written policies and procedures, if applicable, or describe why they did not have written policies and procedures. All survey questions are included in Appendix A.

## CHAPTER 4

### RESULTS AND DISCUSSION

The demographic information obtained from the survey is pertinent to small museums. Each of the museums surveyed have, as mentioned above, no more than four paid employees, with one museum completely managed by volunteers. This information is important in understanding the need for volunteer management policies and procedures as it is expected that smaller museums rely on more volunteers.

Most important to this research is that each of these museums did find volunteers essential to their museum's success, and each museum does utilize volunteers in some way to help offer their services. Average volunteer numbers for the four museums range from 5 to 25. While it cannot be stated as a direct correlation, the museums with 3-4 paid employees have the largest average number of volunteers. This might be because there are more people available to train and supervise volunteers, so volunteer retention rates remain high. Each of the responding museums has one person in charge of the general coordination and management of volunteers.

The research purpose for this paper is to see if small museums have written volunteer management policies and procedures. Of the four museums surveyed, only two, "Museum A" and "Museum B," responded that they do have written volunteer policies and procedures. These museums' responses will be reviewed first. "Museum A" has four paid employees, an average of 15-25 volunteers, and a \$4 general admission fee, and "Museum B" has three paid employees, an average of 25 volunteers, and no general admission fee, but a suggested donation of \$2.

“Museum A” stated that its volunteer policies and procedures included information on each of the important topics as stated above in the literature review—recruitment, written job descriptions, training, recognition and rewards, staff and volunteer relations, evaluations and retention, and risk management. “Museum B” responded that their written volunteer policies and procedures included only written job descriptions, recognition, and rewards as topics within their volunteer policies and procedures. A comprehensive volunteer management plan should include policies and procedures on each of the topics listed in the literature review, as each one is important for the volunteer coordinator, the staff of the museum, and the volunteers. Both museums make it a continual process to review and update their written policies and procedures, as stressed in Hirzy (2007) and Kuyper et al. (1993), where they discuss the reviewing and updating of policies and procedures annually or every five years, respectively.

“Museum A” gives its employees and volunteers copies of the written policies and procedures, while “Museum B” does not. While it is important for volunteer coordinators to understand the policies and procedures, it is also important for the volunteers to know and understand the policies and procedures that concern them. Volunteers will know what is expected of them if they are given a copy of the policies and procedures as a guide.

Overall, the museums that do have written volunteer policies and procedures are more likely to recruit and retain volunteers as well as have a more congenial relationship between the staff and the volunteers. All policies and procedures should include the topics listed in the literature review and should be given to each volunteer

coordinator, volunteer, and paid employee, so there is a shared knowledge of expectations among all that work in the museum.

The two museums that do not have written volunteer policies and procedures are “Museum C,” with one paid employee and six volunteers on average, and “Museum D,” with no paid employees and twelve volunteers on average. Neither museum has a general admission fee, though donations are welcomed.

Responding to questions asking to explain why these museums do not have any written procedures, each museum appears to lack an understanding of the value written policies and procedures can have for volunteers, and each museum does not know how to begin writing their own volunteer policies and procedures. As seen in the Literature Review section of this paper, the benefits of having written volunteer procedures can be tangible, benefiting the museum, the museum staff, and the volunteers. One thing that the current museum boards, directors, and other authorities should consider is how helpful it can be to have written policies and procedures in the event of swift and dramatic change in the museum. For example, the director could suddenly resign, or funding sources could come to a halt. In a museum that is highly reliant on volunteers to run and manage the museum and its collections, these sudden changes can be truly devastating. If a museum has a successful volunteer plan, then transitions or crisis management can occur much more smoothly than without a plan.

It is similarly important to have written policies and procedures that pertain to all types of volunteers. “Museum C” believes that written policies and procedures are not beneficial because most of their volunteer positions are as board members. Board members are beneficial to a museum in making decisions pertaining to museum

management and acquiring funds. However, in these responsibilities, there should be some sort of plan to help manage and supervise the board to make sure they are meeting the expectations of the museum and the community, especially concerning a code of ethics. Because they are the top administrators of the museum, the board members need to have policies and procedures to which they are accountable. With a plan for board member volunteers, a museum can easily recruit, retain, and evaluate members, as well as give members a guideline for what is expected of them as volunteers of the museum. Since board members of a museum are both legally and ethically responsible for the museum, board members must know what is expected of them and what their protections are should legal issues arise.

“Museum D” presents an interesting case. Because the museum has no paid staff, written policies and procedures for volunteers can be extremely important. By having a written plan for each of the volunteer positions, existing volunteers could potentially have more free time to work towards the museum’s mission, instead of taking the time to handle each volunteer on a case-by-case situation. A written volunteer policy could also help “Museum D” with risk management in the event of a crisis. Additionally, with such reliance on volunteers, a written volunteer management plan could help the volunteer-staffed museum with continuous recruitment and retention of volunteers.

## CHAPTER 5

### CONCLUSION

This research paper and survey focused on the question: Do small museums, which are most likely to need volunteers due to lack of paid staff and overall funding, utilize written volunteer management policies and procedures, and are these policies and procedures effective?

As related to the research question, overall, the survey of the four small Southern Illinois museums shows that while two have written policies and procedures for volunteer management, two museums do not. Of the two museums that have written volunteer management policies and procedures, one did not have an exhaustive list of topics concerning volunteer management, and therefore is not considered to have effective policies and procedures. Additionally, not all museums utilize written volunteer management policies and procedures, as shown by half of the museums lacking written policies and procedures.

Reasons for the lack of written policies and procedures can range from a basic misunderstanding of the importance and benefit of policies and procedures to a lack of knowledge on how to begin to write a plan for a specific museum. Additionally, constraints on time and resources can make it difficult to create and successfully implement a plan. Those museums that have written policies and procedures have an average of 15-20 volunteers, so it is likely that these policies and procedures help with the effective utilization of volunteers.

If museum volunteer coordinators can find the time to research and learn about the benefits of written volunteer plans, then each museum would benefit. The benefit

would not be solely for the museum as an organization, but for its paid staff, volunteers, and the entire community. The paid staff will understand what is expected of them in terms of helping and supervising volunteers. Volunteers will benefit by knowing what is expected of them from the beginning of their volunteerism, and what is expected of other staff members. The community can benefit by enjoying a positive relationship with the museum through its volunteers. Museums will potentially have a congenial and collaborative environment that is pleasant for all paid staff, volunteers, and community visitors, and will be prepared in times of crisis or swift change to continue to serve the public successfully.

While the task of writing a new volunteer management plan can be daunting, there are many resources available to help with the creation and implementation of a written plan of volunteer management. The American Association for Museum Volunteers has a short and concise volunteer management plan available on its website entitled “Standards and Best Practices for Museum Volunteer Programs” (AAMV, 2012). Additionally, Hirzy (2007) has provided the readers of her book with a “toolkit” that offers templates and examples of many policies and procedures, job descriptions forms, evaluation forms, and risk management statements to use as a base for creating or revising a plan specific to the museum. Museums may also adopt volunteer policies and procedures from a museum similar in size and volunteer-base (if the museum is willing to provide the information).

Additionally, many professional museum organizations have resources for member museums, including information on volunteer management through documents, webinars, and journal and magazine articles. It would behoove a small museum to find

the funding in its budget to become a member of one or more professional organizations, such as the American Alliance of Museums, the American Association for State and Local History, and the Illinois Association of Museums. Finally, there are many resources available for volunteer management within nonprofit organizations. One such resource is “A Volunteer’s Bill of Rights and Responsibilities” available on [idealist.org](http://idealist.org)—a website devoted to connecting people and organizations within the nonprofit field.

The research conducted in this study suggests recommendations for further research. First, it would be interesting to view the idea of written volunteer policies and procedures within museums from the perspective of the volunteers. The results of the current survey showed that some museum authorities did not value the written policies and procedures of volunteer management, but do volunteers find them valuable? What do volunteers like about policies and procedures? What do they dislike? It could be very useful to volunteer coordinators to understand what the volunteer finds important and unimportant, and what he or she might add to current volunteer policies and procedures.

Secondly, further research might include expanding the survey to larger museums with more paid staff, a greater average number of volunteers, and with larger visitation figures. Would the results change? Or would only about half of the museums use written policies and procedures as this study found? Additionally, the move to a different geographic location could bring about more variations in the survey responses. Do museums in more urban areas lead to higher use of written volunteer management policies and procedures due to the likelihood of more volunteers and more visits from

community members? Furthermore, research on museums that lack any paid staff, like “Museum D,” could present fascinating results. It would be expected that all volunteer-run museums would rely on written policies and procedures concerning volunteer management, but as “Museum D” showed, this may not be the case. Would surveying many volunteer-run museums yield different results?

Finally, a larger research endeavor might look at written volunteer management policies and procedures within the larger realm of nonprofit management. A study comparing volunteer policies and procedures among a variety of nonprofit organizations, such as museums, hospitals, religious services, educational services, and human rights organizations, for instance, might offer the most detailed information concerning the topics that should be included in written volunteer management policies and procedures for any nonprofit organization.

Written museum volunteer management policies and procedures create many benefits for any museum, and should be a priority for any museum that utilizes volunteers. While some museums do not utilize written plans, it is likely they still have a basic, unwritten plan for volunteer management. By transcribing these plans onto paper, museums can be prepared in the event of a crisis or be prepared to expand their current volunteer services as the trends in volunteering and the decline in funding lead to more volunteers wanting more responsibilities. Museums need to understand the benefit and importance of written volunteer plans and how they can improve the services that the museum and its volunteers offer to the surrounding community.

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## APPENDIX

## APPENDIX

Online Survey – Museums and Volunteers

1. Complete Name of Institution
2. Position held within Museum
3. How many paid employees work at the museum?
4. What is your average attendance of visitors to your institution each year?
5. Is your institution open year-round or open seasonally?  
If "Seasonally," what dates is the institution open?
6. What are you admission prices?
  
7. Do you consider volunteers essential to the success of the museum?
8. Does your museum use volunteers? This includes docents, interns, and board members.
9. On average, how many volunteers does your museum have?
10. Who oversees, coordinates, or manages volunteers?
  
11. Are volunteers treated as “unpaid staff,” such as being included in meetings and decision-making? Or are there certain aspects of the museum from which they are excluded?
  
12. Do volunteers have a say in affecting policies and procedures in the museum, affecting the museum’s direction?  
If YES to Question 12: How does the museum seek this input? (for example, evaluations by volunteers of museum activities, active feedback policies, etc.)
  
13. Does the museum have any written volunteer management policies and procedures?
  - If YES to Question 13:  
Do policies or procedures include the following topics concerning volunteers?  
Recruitment; Written job descriptions; Training; Recognition and rewards;  
Staff and volunteer relations; Evaluations and retention; Risk Management  
(such as insurance on volunteers)  
If applicable, what has been your institution's most successful recruitment plan?  
Did your museum adopt volunteer policies and procedures from an existing plan (like from another similar museum or museum association like the American Association for Museum Volunteers) or did the museum write its own policies “from scratch”?

Does the museum review and update the policies and procedures?

If YES, how often? (for example, once a year, once every five years, etc.)

Do you think there is any information that should be added to your current plan?

If YES, what, generally speaking, should be added?

Are employees and volunteers given a copy of the policies and procedures?

- IF NO to Question 13:

Is there a reason why your museum does not use volunteer management policies and procedures?

Please explain your response to the above stated question.

Do you think your museum could benefit from having set policies and procedures concerning volunteer management?

14. If there is any additional information or comments you would like to add, please do so below:

15. Would you like to receive a copy of my research paper when it is complete?

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Research Paper Title:

VOLUNTEERS IN MUSEUMS: ARE SMALL MUSEUMS UTILIZING  
VOLUNTEER MANAGEMENT POLICIES?

Major Professor: Dr. Dona Bachman