



# Making the Most of People:

## Recruitment, Retention, and Recognition



Sarah Leu, Project Archivist, Historical Society of Pennsylvania

1/25/17

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Joy: Hello! My name is Joy Banks, and I am the Project Coordinator for the CLIR Strategies for Advancing Hidden Collections six-part webinar series. Welcome to our third webinar, Making The Most Of People: Recruitment, Retention, And Recognition. This series is offered through the generous support of The Andrew W. Mellon Foundation.

We have a few housekeeping items. Please use the chat box during our presentation to share thoughts on the topic of the webinar. If you have questions, please enter them in the Q&A box, and we will do our best to address them all. We will also have a time for questions at the end. If you have any technical issues during the event, please send a private message to Louise Gruenberg. If you are viewing this as a group, please send a private message to me with your name, email, and group count. You will be prompted to complete an evaluation when the webinar is done. Completion of the evaluation will make you eligible for a downloadable Certificate of Completion for your records. Please keep in mind that the webinar is being recorded, including the audio, slides, and chat. Recordings will be sent to the registered participants as soon as they are available.

Joy: It is my pleasure to introduce our speaker for today, Sarah Leu. Sarah is a project

archivist at the Historical Society of Pennsylvania (HSP) in Philadelphia. Sarah previously worked as the Lead Project Surveyor for HSP's Hidden Collections Initiative for Pennsylvania Small Archival Repositories funded by the Andrew W. Mellon Foundation. The goal of this five-year project was to make better known and more accessible the hidden collections at small and largely volunteer-run archival repositories in the five-county Philadelphia region. During the course of the project, Sarah worked with over eighty small archives, museums, libraries, historical societies and historic sites, and other archival repositories. Sarah earned her B.A. in Art History and Classics from Syracuse University and her MSLIS with a concentration in archives from Drexel University.

Sarah: Thank you, Joy. And welcome, everyone. I am excited to be with you today.



## Webinar Outline

- Introduction
- Value of SIVs and How to Reach Out to Them
- Determining Skill Sets and Interests
- Recognition and Reward
- Maintaining Consistency Throughout the Project
- Resources
- Questions and Feedback

You've already heard about project planning and how to determine what and who you will need for your project. Today we're going to talk about how valuable students, interns, and volunteers can be to GLAM projects, how to reach out to these groups, how to best utilize them and give them a positive experience, and things we can do to recognize their work and show our appreciation. In addition, because projects can be lengthy and therefore can result in various people working on them throughout their duration, we'll touch on tips for maintaining project consistency. We also have a list of resources in our resources library that relate to working with students, interns, and volunteers (SIVs). Please note that we will not be talking about everything it takes to create a formally-run volunteer program. There just isn't enough time today, but please see our resources library for materials that DO relate to this topic.



## Objectives

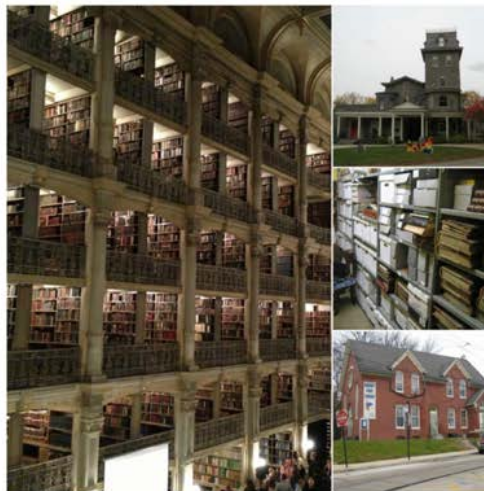
- Understand how volunteers and interns can be a valuable tool for completing a project
- Have strategies for tapping into the skills and strengths of existing people
- Know how to give a beneficial working experience to volunteers and interns
- Have ideas for sharing project success with everyone who helped

And here is just a quick reminder of the objectives of the webinar.



## Getting to Know You!

- Organization size
- Organization type
- Experience with students, interns, volunteers?



When you first entered the lobby for the webinar there were some polls we asked you to respond to. If you didn't do that yet, I'm going to pull them up here so you can respond and we can get a sense of who is here today. Ok, great. As we all know, staffing for the brunt of project work is often a challenge, especially in smaller organizations. When planning a project, you can turn to current staff as well as individuals outside of your organization to help you achieve your project goals, including students, interns, and volunteers. Depending on your type of organization, one of these groups may be better suited to your institution than another.



## Value of SIVs During Project Work



### Upsides

- Labor source
- Connections and advocacy
- Perspective

### Caveats

- **NOTHING** is free
- Potential for turnover
- Reliability

Each year, many GLAM organizations must find a way to continue their work with small (and often reduced) personnel budgets. One way to compensate for a lack of personnel funding on projects is to make use of volunteers and interns for the brunt of the project work, whether it is scanning materials, creating metadata, cataloging objects, or another task that constitutes the bulk of the project work. However, you should be aware that although many SIVs are not paid, as Rosemary mentioned in last week's webinar- **NOTHING IS FREE!** It will take staff time to train students, interns, and volunteers, and staff members may even be needed to do or complete the project work. A staff member will also need to spend part of his or her time supervising the work done by SIVs. Proper training and adequate supervision is important to maintaining consistency throughout the project, which we will discuss further in a little while. Training is also important to keeping your SIVs happy- a common complaint of volunteers at non-profits is that they did not receive what they felt to be enough or adequate training in their duties.

In addition to being a source of labor, volunteers can often connect your institution to other organizations and community groups, act as a liaison to your local community, and become some of your organization's greatest advocates. Of course, this all depends on the volunteers having a positive experience! Volunteers and others who

are not paid employees can also give you a fresh perspective on your project and be helpful in usability testing, if you are creating a website or another digital project.

Another issue to be aware of when working with SIVs is the potential for turnover and reliability. Because SIVs schedules can be unpredictable, you may have to deal with people leaving during a project or work not getting done as quickly as you had planned. It is always a good idea to manage your expectations from the outset when dealing with SIVs. Although these same issues can occur with staff working on the project- it is less common and therefore, these issues could serve as an argument to stakeholders for funding additional staff during your project planning phase.



## Which Type of Volunteer?

### Academic Institution

- Students
- Interns
- Work-study



### Community Organization

- Community groups
- High school students
- Court-appointed



If you are in a school, college, university, or other type of academic institution, students and interns will be your best bet, but be aware that students, especially interns, will often have a set number of hours they need to work in order to meet an internship or volunteer requirement. Students and interns will also be looking for a project that provides them with a learning experience (more than just a work experience) and skills that will be transferable or otherwise helpful to them in the future. There are also some newer legal requirements related to interns that require payment and rather specific job description requirements to prevent companies from taking advantage of a free-intern system. Our resource library will have additional information to help you understand more about this issue.

If you are a community organization, such as a public library, high school students or members of community groups, including Boy Scout troops, 4-H clubs, Rotary International or other civic groups, or senior centers may be a good place to look for volunteers.

High school students often have to satisfy a community service requirement for graduation or may need community service hours for scholarships. Additionally, court-ordered or court-appointed community service volunteers may be another



source for public libraries, although there will be paperwork or weekly reports required for this type of volunteer.



## Which Type of Volunteer?

### Member-based Institution

- Look to your membership!



### Libraries and Archives

- Historical and genealogical societies



If you are a museum or other member-oriented organization, your members can be an excellent place to find volunteers. Members of your organization and volunteers from community groups often have altruistic motivations, or are interested in the benefits your organization provides to volunteers.

Historical and genealogical societies can also be a good source of volunteers for archives and libraries because of their shared interests.

I should also point out that I've highlighted each type of institution's "best bet" among SIVs; however, that does not mean that you can't bring in SIVs from elsewhere. For example, a museum may also find several potential volunteers among other community groups and high schools.



## Ways to Reach Out

- Contact organizations that require community service hours
- Membership form
- Social media, digital videos, website
- Emails and newsletters, blogs, flyers
- Staff connections, community centers, graduate programs
- Event announcements
- Local news organizations and other public outlets

When reaching out to potential SIVs, there are a variety of methods. You can contact schools, community groups, and/or courts that require community service hours. You can also have a section on your membership form or library card form that asks if the individual is interested in volunteering/working on a project and in what areas of volunteer service they are interested. This is a good way to match people to various projects. Using social media, digital videos, your website, emails, newsletter, blogs, and flyers can also be good ways to announce that you are seeking help with a project.

Post announcements for the staff at your institution (in case people know anyone who might be interested), as well as at community centers, schools, or grad programs. (If it is a larger institution, you may need to get in touch with a volunteer/community service department. They often have a list of available volunteer or internship opportunities that they maintain or email to students.) Staff, members and current volunteers can also be used as “ambassadors” for your GLAM organization- if they are going to or hosting an event that you think might be a good source for potential volunteers, have them make an announcement or distribute flyers.

It is also a great idea to establish a connection with a local news station or other type of media organization. If they are running a story about something happening at your organization or about a town anniversary or another topic and you have materials or objects that relate to the topic, collaborate with the media to show off your collection and also slip in an announcement about volunteering.



## Ways to Reach Out – Tips!

- Specialty newspapers and community centers
- Highlight various benefits
- Project overview
- Visually appealing! (Unlike this slide.)
- Don't forget about current staff



If your project could benefit from volunteers with a specific skill set, all of the other methods I've already mentioned could still be useful, but it can be helpful to contact specialty newspapers and community centers or other places geared towards those who may have the skills you need. This could be especially helpful if, for example, you are processing or cataloging materials that are in a foreign language and you are looking for someone who is familiar with that language to help you understand what the object or collection is.

Also, remember that the motivation to volunteer will be different for different people, so highlight a variety of benefits when reaching out. Students and others with a variety of commitments in their lives may value flexibility in scheduling, while others may respond better to a fixed weekly or monthly schedule. Still, others may value free tickets to an event at your organization or a discount to your gift shop.

Additionally, when advertising a volunteer or internship opportunity, give an overview of the project, but don't make it so complex that it will turn people off; give the project context and point out why it is important and how the project will help the organization, community, and/or researchers/patrons. This can help weed out volunteers who may not be suited to the project. Also- If you can present all of this in

a visually or aurally appealing manner, that is even better!

I want to point out that in addition to seeking out SIVs, you shouldn't forget about any staff you already have that may be suited to the project at hand. If you have staff that has expressed interest in a particular project or that already has some of the skills you are looking for, you may wish to approach them and see if they can contribute to the project, but make sure that participating in the project won't put too much on their plate. If it does, think about whether you can delay starting the project until that staff member has more time, or speak with the staff person's supervisor to see if there is a way to temporarily reduce some of the person's other duties to make time for work on the project. Have some reasons ready to back up why that specific staff person could be helpful to the project; talk about what that person would add to the project and/or how he or she could be helpful to completing the project on time or under budget.



## Activity # 1: Discussion

- How have you effectively reached out to these types of groups?
- What types of outreach methods have worked better for you?
- What places have been volunteer "hot spots" for you?
- What do you think would motivate volunteers to come to your organization?

It is now time for our first activity! Similar to the other webinars you've participated in with this series, I'm going to put some questions out there so that we can learn from everyone else's experiences, utilizing the chat box on the left of the screen to facilitate discussion. We will be capturing the chat comments as part of the recording in case there is something you want to refer back to. The first question is already posted in this chat thread on the left: How have you effectively reached out to students, interns, and volunteers? What types of outreach methods have worked better for you? What places have been volunteer "hot spots" for you? What do you think would motivate volunteers to come to your organization? Regroup and return to slides.



# Discussion

**Q1. How have you effectively reached out to students, interns, and volunteers?**

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The group spent 4 minutes discussing this question. A complete transcript of Chat 1, Strategies for Outreach to Students, Interns, and Volunteers, can be downloaded on the webinar's home page found in the text below.

## Discussion

**Q1. How have you effectively reached out to students, interns, and volunteers?**

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## Discussion

**Q2. What types of outreach methods have worked better for you? What places have been volunteer “hot spots”? What do you think motivates volunteers to come to your organization?**

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The group spent 8 minutes discussing this question. A complete transcript of Chat 1, Strategies for Outreach to Students, Interns, and Volunteers, can be downloaded on the webinar's home page found in the text below.

## Discussion

**Q2. What types of outreach methods have worked better for you? What places have been volunteer "hot spots"? What do you think motivates volunteers to come to your organization?**

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## Food for Thought

- Are unpaid internships and other positions ethical?



I just want to take the time to mention here that there is an ethical debate when it comes to sources of "free" labor, such as volunteers and interns. Of course, I wish that everyone could be financially compensated for the work that they do all the time- and we should all be advocating for that to become the norm. However, as things stand today, small budgets and reductions in funding make this difficult. This is part of the reason why volunteers are so valuable to GLAM organizations. That being said, if we cannot pay everyone for their work, I believe that the volunteer and parent organization relationship should at least be symbiotic, a two-way street. In other words, a mutually beneficial relationship. If we can't directly pay people for their work, we can at least make sure that it is a worthwhile experience and that the volunteers are getting what they want out of it. This goes a long way toward retaining volunteers and ensuring they have a positive experience.



## Determining Skill Sets and Interests

- Interviews
- Questionnaires
- Chats



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So. Once you have people interested in volunteering or interning, you want to be sure to match them to a project that they will find interesting and of value. This is where interviews, questionnaires, and other ways of determining a volunteer's skills can be helpful.

Use interviews and/or volunteer applications or questionnaires to find out what is important to SIVs (and make sure they get that out of their experience). You should also use interviews to learn about skill sets and interests so you can match them to a project that will appeal to them.

Some people may feel intimidated by a formal interview or a formal interview may not fit the style of your particular organization, so you may want to consider meeting up for lunch or coffee/tea with your volunteer and having an informal chat about their interests. In a more relaxed setting, the volunteer may be more open and honest and it may be easier for you to evaluate them.



## Determining Skill Sets and Interests

- Volunteer application example: [Yale Peabody Museum](#)
- Volunteer landing page example: [Yale Peabody Museum](#)
- Volunteer agreement and expectations form example: [Alexandria Museum of Art](#)

There are a number of examples of volunteer applications and questions to ask volunteers available on the internet. I've included one here from the Yale Peabody Museum in Connecticut. The Peabody also has a nice landing page on its website for volunteers. These can also be found in our Resource Library for this webinar.

I want to point out here that while it is important for you to gather information about the volunteers, it is also important for them to obtain information about your organization. Several GLAM institutions have a volunteer form or handbook that outlines important information for volunteers. These documents will often include statements regarding the institution's volunteer code of ethics and professional standards, general volunteer policies and procedures, and expectations for volunteers (including not only what the institution expects from volunteers, but what the volunteer can expect from the institution). I've included an example here from the Alexandria Museum of Art in Louisiana. This agreement form and the application from the Peabody Museum are available as a document download in today's webinar as well.



## AVAILABILITY!



Don't forget to discuss or gather information about the volunteer's availability! It is best for your organization (although not required) if volunteers plan to be there for the entire duration of the project, although that often doesn't end up being the reality. This is one of several reasons why planning a timeline for your project, as mentioned in the first webinar in this series, is important. That being said, if you think the volunteer is really well matched to the project, you should still consider using them even if they will not be available for the project's duration. As we will discuss later, there are ways to maintain project consistency when you have a turnover of volunteers throughout the project.



## Utilizing Skill Sets and Interests



Once you have gathered information about skills and interests and they have information from you about the work environment and expectations, you can begin to match the volunteers to projects that will best suit them. For example, if they are good with technology and detail oriented, put them on a scanning and metadata project; if they are good at seeing the big picture, have them help with project planning issues, planning programs, exhibits, social media posts or other things that can happen across your organization's departments that all relate to the project; if they get bored easily, make sure they have a variety of tasks; if they love genealogy, put them on a family history project, and so on. Additionally, if you find someone doesn't quite fit what you are looking for or you don't think they will enjoy the work you have for them, you should consider if they might fit better at another organization and recommend them to that organization.





## Skill Sets and Interests of Existing Staff

- Select a project that takes advantage of the skills of your existing staff/volunteers
- Discovering hidden talents and skills of existing staff
  - Ask!
  - Assign a group or individual project
  - Switch places
  - Encourage staff to go outside their comfort zone
  - Peer to peer reviews

Ok, so what about existing volunteers or staff? I think it is important to mention that if you already have a good group of volunteers working for you, you might consider evaluating their skills and interests and building a project around them. This is why it can be important to already have projects in mind for your collections, as mentioned in Week 1's webinar. The same goes for your staff. You should take note of your existing staff's skill sets, not just their job descriptions, and see if there is a project that might match those skills. What are some ways you can figure out what skills your staff has that not might be obvious to you? Ask them. Either ask them directly or have them fill out a survey or questionnaire- maybe someone on your staff knows Mandarin- you never know unless you ask. You can also try assigning people a small group or individual project to see how they handle themselves in these different environments. Similarly, have people switch jobs for a day or shadow someone in a different position or department. Encourage staff to go outside their comfort zones. Trying new things can often lead to the discovery of a hidden talent. Although this may not be good for every work place, you can also try doing peer-to-peer reviews, but remember to try and keep it positive, if you choose to allow criticism during this activity, make sure it is all constructive and presented without hostility.



## Non-Traditional Projects

- Crowdsourcing
- Blitz Projects



Now, I'm just going to take a few minutes to discuss two non-traditional ways of utilizing volunteers for projects: crowdsourcing and blitz projects.



# Crowdsourcing

## Planning It:

- Keep it simple!

## Building It:

- Tech people required?
- Maintenance



[Library of Congress](#)

[University of Iowa](#)

[Smithsonian](#)

[Article](#) from *Information Today* on crowdsourcing with additional examples

Crowdsourcing is a way of accomplishing tasks by outsourcing the task(s) to multiple people. Crowdsourcing projects can increase access to collections by providing your institution with data that would take much longer to gather on your own. It can also be a great marketing project by bringing awareness to your collection and getting people invested in it.

If you are using crowdsourcing to gather data there are a few things to keep in mind: Keep things simple. The data you are requesting or the task you wish to accomplish should be straightforward and unambiguous. Things like transcription and indexing are ideal for crowdsourcing. Projects that involve asking users to analyze material and write full text descriptions tend to not work as well; the quality of data will vary and people will not be able to spend enough time with the material.

If you are doing an in-house digital crowdsourcing project you may need to have tech people on hand to build and maintain it. You could also use existing services like Flickr and Vimeo.

I've highlighted some examples of crowdsourcing projects and an article on crowdsourcing that has some additional examples.



## Blitz Projects

- Short-term and intensive
- Can be tedious work, but worth it!
- Great projects for existing staff, but can be good for one-time volunteers too
- Projects can include filing, labeling, and other tasks that increase access to collections
- Yellowstone National Park Blitz Project
  - [Using a Team Approach](#)
  - [Archives Blitz as a Framework](#)
  - [Keys to a Blissful Blitz](#)



As the name implies, blitz projects are intended to be short-term and intensive. As the saying goes, many hands make light work. Like crowdsourcing, these projects are an excellent way to increase access to collections and it is a good idea to keep blitz projects simple and well defined. It is also important to make them rewarding for those who participate.

Blitz projects that are completed in a day are good for volunteers that have limited time to work on a project. Day-long projects also ensure that just one set of volunteers works on the project, so you won't have to deal with the potential of turnover. You can also plan blitz projects that are longer in duration, such as a weekend or up to a week. Once you have determined what your project is, you can determine how many volunteers you will need to finish it in the desired time.

It is crucial to explain to the participants in the blitz project why their work is important. Sometimes the work can be tedious, but if people feel invested in the outcome, the quality of the work and the overall enthusiasm for the project will be greater.

Blitz projects can be developed for your current staff too. If there is a project that has

been lingering but no one person has enough time to work on it by themselves, it might make sense to create a blitz project where everyone works on it.

Things like filing, labeling, and other similar tasks are great for blitz projects because they have a defined beginning and end and also do not take too much professional expertise.

Here are some articles about a blitz project funded by CLIR that took place at Yellowstone National Park.



## Recognition and Reward



It is important that volunteers feel that they are valued by your organization and considered to be “part of the team.” This is something else that goes toward retention of volunteers. That being said, it is important to maintain a balance of responsibility with volunteers, to make sure they have enough of it to feel satisfied and that they have a positive experience, but do not become too bossy or pushy to the detriment of the project or the annoyance of the staff and other volunteers. One way to do this is incrementally; start out giving them a lower amount of responsibility and if they handle it well, consider giving them more. The bottom line is: make sure they know the boundaries and do not cross them, but also show them how much they are valued by recognizing and/or rewarding their work.



## Recognition and Reward

- Reiterate the impact of their work
- Project-related events
- Volunteer appreciation day
- Letter or certificate
- Gifts or prizes
- Meet the donor
- Student deliverables



Here are some ways to show your appreciation. When selecting how to show your appreciation, remember to think about what they said they were hoping to get out of volunteering or interning when you brought them on board. It will likely be different for each person.

You should always remind them how their work directly impacts the organization and its users/patrons (e.g. How their work fits into the bigger picture. “Because you did X, library visitors/researchers will be able to do Y.”)

Invite them to project related events, such as lectures, exhibit openings, other programs, etc.

Have a volunteer appreciation day. Volunteer Appreciation Week is in April, but you should consider having a volunteer appreciation celebration multiple times throughout the year or at the end of the project since not all volunteers from the whole year may be able to attend something in April, or the project may conclude before then. Having multiple celebrations is also a good idea for longer projects that may have different waves of volunteers. Also, make sure whatever you do for volunteer appreciation day can be enjoyed by all of the volunteers (e.g. a pizza party

is not always a good idea if not everyone can attend or people do not eat that type of food).

Letter from the president thanking the SIV, a certificate, or a letter to the rest of the organization about the SIVs accomplishments

Gifts or prizes, possibly merchandise from your organization that is only given to volunteers

Set up a meeting with the donor or donor's family: volunteers often will have the most hands-on experience with the item/collection depending on the project and donors like to talk to the people who worked with the material. We did that once with an internship that I helped to coordinate and it was a great experience for the intern, the donor, and the organization.

For students, especially, you can keep a log of their hours, tasks, and accomplishments and give it to them at the end of their project so that it is documented, or add deliverables from the project to the student's internship portfolio. (As a bonus for yourself, you can also use the information you gave to the student to justify the project or garner additional support for it or another rendition of it. You can link to project deliverables in the annual report or departmental reports, or even a newsletter!) If you are going to present about the project at a conference or use it for a poster, allow the student to assist.





## Activity # 2: Troubleshooting

- What challenges have you faced or are you concerned about with students, interns, or volunteers?
- What solutions have worked for you?

It is now time for our second activity! I want to take this time to discuss concerns people have about working with SIVs. What challenges have you faced or are you concerned about with students, interns, or volunteers? What solutions have worked for you? This will work like our first discussion, please use the chat window to express any questions or thoughts.



# Discussion

**Q1. What challenges have you faced or are you concerned about with students, interns, and volunteers? What solutions have worked for you?**

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The group spent 15 minutes discussing this question. A complete transcript of Chat 2, Troubleshooting Concerns about Students, Interns, and Volunteers, can be downloaded on the webinar's home page found in the text below.

## Discussion

**Q1. What challenges have you faced or are you concerned about with students, interns, and volunteers? What solutions have worked for you?**

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# Discussion

**Q2. What types of awards or recognition have worked (or not) in your organization?**

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The group spent 5 minutes discussing this question. A complete transcript of Chat 2, Troubleshooting Concerns about Students, Interns, and Volunteers, can be downloaded on the webinar's home page found in the text below.

## Discussion

**Q2. What types of awards or recognition have worked (or not) in your organization?**

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## Maintaining Consistency

- Documentation
- Communication
- Evaluation



As I mentioned at the beginning of this webinar- and several times throughout, projects can have a high turnover rate. Sometimes this is because the project is long, and sometimes, as we all know, things just happen. This is why it is extremely important to have project documentation, communication, and evaluation.



## Maintaining Consistency - Documentation

- Staff and volunteer work (hours worked, tasks, deliverables)
- Job or volunteer descriptions
- Recruitment sources
- Skill sets and volunteer card
- **PROJECT WORKFLOWS, PROCEDURES, AND DECISIONS!!!!**

First, Documentation. You should document the staff and volunteers' work that goes into the project (hours worked, tasks completed, deliverables, etc.), their job descriptions, the recruitment sources you used to find the volunteers, and the skill sets of the staff and volunteers that worked on the project. (You may also want to create a volunteer card for each volunteer that lists their contact information and skills sets. This way, if another project comes along that they might be a good fit for, you can contact them directly.) In addition, you should document the project's workflows and any procedures that occur within those workflows. If you have specific metadata that you are capturing, write it down! If there is a specific standard you want the metadata to follow, state it! Trust me. This will provide consistency when you train staff and volunteers and will lead to greater continuity throughout any staffing changes during the project's life cycle. (You should also make sure that all staff and volunteers are following the steps in the documented procedures.) An ounce of prevention is worth a pound of cure. If you start out with five volunteers in September and train them, but then in July of the following year you have to train a new batch of volunteers and you didn't write anything down, you will be kicking yourself. Save yourself the stress. Be proactive. Write down all of your decisions, and even write down why you made them, in case you have to justify them to someone else or remember why you made that decision in the first place. It will also help if you

or someone else does a similar project several years down the road or if work on the same project continues at a much later time due to funding or other issues. I can't say this enough: document everything! You will thank yourself down the road. You may even get a thank you from someone after you've left the organization.





## Maintaining Consistency - Communication

- Check-in times
- Review of work
- Supervision

**Talk it out,  
work it out!**

Communication is also very helpful to ensure consistency during staff turnover. The person responsible for managing the volunteers on the project should set up a regularly scheduled “check-in” time, whether it is multiple days during the week, weekly, or monthly, depending on the complexity and duration of the task on which the volunteer is working. This will provide volunteers with a set time during which they can ask you questions or report any problems and you will hopefully be able to catch inconsistencies or errors before they get out of hand. It would also be beneficial to review a sample of the volunteer’s work to ensure things are going smoothly. Part of maintaining consistency throughout the project is good supervision, which as I mentioned earlier, is something that requires a staff member’s time.



## Maintaining Consistency - Evaluation

- Continuous. Don't leave it until the end of the project.
- Volunteer experience from your point of view
- Volunteer experience from their point of view
  - Exit interview
- Advertise positive remarks made by volunteers as part of recruiting for your next project and for the stakeholders

Evaluation is key in any project. It is important to note that evaluation does not have to be left until the end of the project, and in fact it shouldn't. In addition to evaluating the various aspects of the project, you should evaluate the volunteer aspect from your organization's point of view. How did using volunteers work out for this project? Was it worth it for you to use volunteers instead of staff? Remember: you also need to evaluate the project from the volunteer's perspective. Gather feedback from the volunteers. Give each volunteer an exit interview or something similar but less formal. What was good and what could be improved upon in their opinion? What would make it a better experience? Did they feel instructions were clear? What did they learn from the project? After the exit interview, you can post positive testimonials about working on the project to your website and include them in your annual report and future ads for volunteers. Also- don't forget to document how you evaluated the project! For more on evaluating your project, don't miss the sixth and final webinar in this series on February 15, 2017.



Maintaining Consistency  
One More Time...



**DOCUMENT YOUR  
PROJECT WORKFLOWS,  
PROCEDURES, AND  
DECISIONS!!!!**

One more time...a last plug for documentation- DOCUMENT YOUR PROJECT WORKFLOWS, PROCEDURES, AND DECISIONS!!!!



## Other Things to Consider

- Reiteration: Training time
- Training methods
- Collaborating with other institutions
- [Resource Library!](#)



Unfortunately, we don't have a lot of time to discuss building a volunteer or intern program, but there are materials in our Resource Library that do cover this topic. I know we have talked about how training volunteers takes time and often involves training materials, so I want to remind you here: don't forget to budget or account for training materials and build the time into your project- and make sure you build in additional time. Yes, you will need to train them to do the tasks to which they have been assigned on the project, but there may be additional areas in which they need to be trained, such as privacy/confidentiality issues or safety training. You may also need to train new volunteers that you hadn't planned on training as the project goes on.

Also remember that SIVs will have a variety of knowledge bases, but all will need to feel comfortable and confident in the work they are doing. Some volunteers may require training that uses layman's terms while others may be more familiar with GLAM terms and other professional jargon. Some people may be hands-on learners and others may thrive in more of a classroom setting.

When determining what to include in your training, ask yourself what you want the outcomes of the training to be. Make sure your training includes information about being a volunteer- what is expected, do's and don't's, basically a short outline of what

is in your volunteer guidelines and handbook, which they should read and sign. In your training also include things the volunteers should know about your organization- its operational structure, its history and mission, and other important information. Detail the work they will be doing and how to do it- this is very important and it should be effective so that volunteers gain confidence in their tasks, be sure to include best practices and explain why best practices are important.

After the training is done, evaluate the training and build upon your program. Retain what was effective and get feedback from the volunteers who went through it as well as past volunteers who have already been doing the work for a while. Ask a staff member for input.

After obtaining the feedback, update your training program and include new information and strategies for training. Be aware of anything in the training that needs to be updated based upon the season (e.g. highlighting an inclement weather policy).

Consider how to present your information/training sessions. With in-person training you can answer questions immediately and that are specific to that volunteer, but in-person training only takes place at a specific time and location; not everyone may be able to make it and it will take time to run additional training sessions. Recorded trainings are more flexible for volunteers with busy schedules, but then you cannot directly answer their questions unless they contact you afterwards. Some people may also become distracted easily while viewing recorded trainings. You may also wish to assign pre-reading for the training session so that volunteers can move through it at their own pace. Hands-on training is another method of training that is good for teaching volunteers to do specific tasks. I would suggest having a binder that has step-by-step instructions detailing procedures from the hands-on training in case people forget something. You could also have a binder detailing information from the general training session.

Think about trying to present information to volunteers in at least three different ways. Give breaks if needed. Limit spurts of information to about 20 minutes at a time and give them time to process it. It is not unusual for 20 minutes of content to take 1 hour of training.

Moving on from training, I also want to share a little tip, in case it may be helpful to you all. Think about the possibility of collaboration with other institutions to overcome staffing challenges. If there is another GLAM organization located near you, talk to them. They may have some insight on recruiting and retaining volunteers. Additionally, it could be that they have some volunteers that might fit a project you are undertaking or you might have some volunteers that fit a project that the other

organization is doing. Talk about the possibility of creating a collaborative volunteer program. This will keep volunteers continually working on new projects, which may entice them to stick around longer. It's also just a good way to help out your fellow GLAM institution. We shouldn't be competing against each other for volunteers, we should be sharing the wealth!

I know I've mentioned it a couple of times before, but please be sure to check out our Resource Library for additional information!



## Questions, Answers, Feedback

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Congratulations! You made it! I believe we have some time for questions and I believe Joy will be explaining about our feedback form. [Move to Question Room]

Thanks so much everyone!

[Louise reveals hidden slide pod and hidden Links pod.]

[Joy says] Thank you Rosemary and everyone for a great session. Please be sure to complete the webinar evaluation while the content is fresh in your mind. You can access the evaluation using the link visible on the screen or wait to be redirected when the webinar is ended. The evaluation link will also be available on the website with the recordings. Live participants will also receive the link with their email containing the access link for next week's session.

Closing remarks: Now that you've heard webinars on project planning, funding and resources, and volunteer staffing possibilities, it's time to think about what standards and other resources will help make your cataloging or processing project successful. Join us at the same time and place next week for the fourth webinar in our series: Collection Access: Describing, Cataloging, and Processing with the Future in Mind.

[Christa ends recording and ends meeting.]