# Managing Volunteering in Archives: Report

**January 2014**

**Caroline Williams, Independent Archival Consultant**
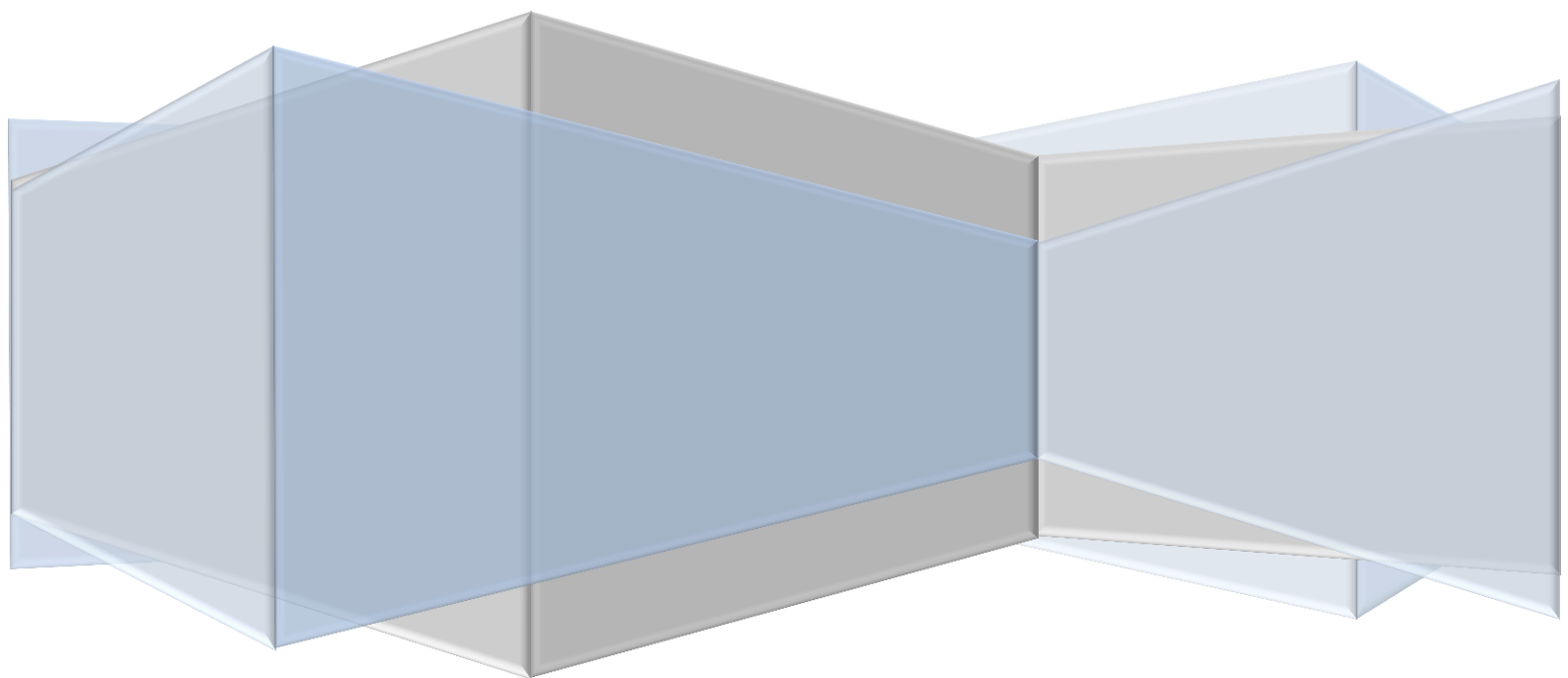
# *Archives and Records Association: Managing Volunteering in Archives*

# *Report*

## *Contents*

## Foreword

Through its previous work in the area of volunteering, in particular through the awarding of the annual Volunteering Award, the Archives & Records Association has showcased many instances of good practice. However, there have been concerns raised about the role of volunteers, both within archives and in related domains such as museums and libraries, particularly around whether current financial constraints are influencing the role of volunteers. Therefore, earlier this year, ARA set out to commission research which would explore the rich variety of roles undertaken by volunteers within the archives sector in the UK and Ireland, and also try to consider whether external influences such as the economic climate and technological changes are influencing the role of volunteers within archive services.

ARA commissioned Caroline Williams to undertake this work and we are pleased to be able to present her research in report form to our members and other interested parties. This report supplements, reviews and updates the National Council on Archives 2009 report *Volunteering in Archives* but reflects a shift in emphasis*:* while in 2009 the report highlighted the experience of volunteers, this one considers in more depth how services manage these volunteers.

It is perhaps reassuring to note the overall picture the report presents. That whilst the use of volunteers in archives is increasing, this is occurring alongside improved approaches to volunteer management and appears to be more closely aligned with on-going community engagement by the sector than as a consequence of cost-cutting. Nevertheless ARA will continue to monitor developments in this area closely over the next few years.

The report outlines a number of recommendations; some for archive services and others addressed to ARA itself. ARA accepts the seven recommendations set out in the report for its consideration. A number of the recommendations chime with the proposed activities set out in the published 2012-14 'Volunteering in Archives' Action Plan. Where this is not already the case this Action Plan will be further refined to incorporate these recommendations.

On behalf of ARA I would like to thank all those who contributed to the survey on which the report findings are based.

**Louise Ray, ARA Board Member and Convenor of the PSQG sub-committee on Volunteering**
**January 2014**

# Extended Executive Summary

In June 2013, as part of its 2012-14 'Volunteering in Archives Action Plan' the ARA's Public Services Quality Group (PSQG) Sub-Committee on Volunteering commissioned research to add to existing evidence of volunteering currently undertaken in archives in the UK and Ireland. The outcome would enable it to enhance existing guidance and support on the different volunteering opportunities, management models, activities and roles that services might adopt and adapt to their own circumstances.

An online survey, open 14 August – 11 September 2013, comprised 44 questions in four sections. The research evidence derived from 100 good quality responses has provided a robust and reliable indication of the broad numbers of volunteers that services engage with, their profile and characteristics, and the types of volunteering tasks and projects that they undertake. Services have also provided comprehensive information about their methods of volunteer management, and their approaches to issues of policy, training and the challenges that arise.

## <u>Findings and analysis:</u>

### Volunteering profiles

Volunteering is growing while profiles of volunteers are remaining fairly constant.

1. The overwhelming motivation of services for involving volunteers was that it enabled them to do things that normally they could not; very few do it because it 'saves money'. This reinforces the overall finding that volunteers are used to enhance existing provision, not to replace funded posts or services.
2. While most (65%) of services have up to 20 volunteers annually, a few (11%), mostly local authority or national bodies, hosted over 50 each. Volunteers are mainly hosted in generic placements associated with 'social' volunteering (59%) with a substantial minority undertaking specific placements (e.g. for experience necessary to access archives/records management/heritage professions), and evidence indicates that these are increasing slightly.
3. This profile aligns with the analysis of volunteers' age, most (59%) being over 55, with the next largest group (17%) in the 18-24 (student) age bracket. Diversity indicators were sought (ethnicity, disability) and it appears that the overall profile is not dissimilar to that in Ray's 2009 Report. Volunteers are loyal: in 48% services volunteers had been with them for 11 years or more.

### Service management

The largest number of volunteers is hosted by local authority services. Overall volunteer management is developing systematically.

4. The majority of responses came from local authority services (45%), with a good number from specialist archives (27%), universities (15%) and national archives, libraries and museums (11%). 2 responses came from business archives. In terms of national responses, 14 were received from Scotland and the Islands, 9 from Wales, 77 from England.

5.  Services' management of volunteers is developing, becoming clearly embedded as a 'business as usual' function. Increasing numbers (89%) have a volunteer policy; include volunteer activities in business plans (39%); and quantify volunteer contributions in financial terms (23%).  A third had a specific person with responsibility for volunteers, with about half of these having 'Volunteer Co-ordinator' as a role title.  Training and induction are undertaken routinely; formal evaluation and quality checking of work is common place.

6.  Services still largely rely on informal methods of recruitment, such as word of mouth or being approached by volunteers, mainly as individuals, but also in groups to support specific projects. There is still a ready supply of volunteers: for many services (60%) the only constraint on recruiting is the lack of resources (space, staff time) for managing them.

7.  There remain significant challenges for services in managing volunteers: for 95% its time-consuming nature is the greatest challenge; 82% find that the quality of work can be variable; 60% have issues with the overall resourcing of volunteering; 25% think the lack of a volunteer manager is a problem. Some have difficulty in recruiting volunteers with appropriate knowledge and skills, and others find that volunteers' expectations have increased. Some comments expressed anxiety over the 'intern' debate (the use of non-professionals to undertake professional roles).

8.  Demonstrating the value of volunteering in funding applications has contributed to success, mainly with the Heritage Lottery Fund (22 services) but also the Welsh Government through its CyMAL: Museums Archives and Libraries Wales division and the National Cataloguing Grants Scheme.

**Volunteer activities, tasks and projects**

Detailed analysis of volunteering roles and activities provides a rich picture both of the contributions of volunteers and the context in which they are made, whether on- or off-site.

9.  A huge majority of services engage volunteers in records description and cataloguing (93%), conservation and preservation (85%), and sorting and arranging records (74%), with about half using them for scanning and digitisation projects.  These are heavily process-based activities. Overall, fewer appear to be engaged in the interpretation of archives or in the public profile of the service.

10. This provides an interesting insight: professional archivists worry about volunteers taking on 'professional' jobs,  which include arrangement, description and preservation: however a large number of volunteers do this work, under supervision.  It would seem that professionals in fact are more likely to reserve to themselves those aspects of work that directly interface with their users and stakeholders.

11. 93 specific projects were described by 47 services, some hosting between 2 and 4 projects each.  Some projects were named and thematic, using archives drawn from more than one source (e.g. 'Paved with Living Colour' and 'Hens Tae Watch Oot Fur'). Others focused on the cataloguing of specific archive groups or fonds (e.g. Philip Larkin Letters) or series (e.g. Swindon Works engineering drawings) or on indexing and transcription.  Many projects were conservation/ preservation-based: e.g. physically re-locating archives, surveying, cleaning, re-packaging.

Analysis of activities and projects highlights that:

12. Cataloguing, indexing and transcription of archive groups or series are instrumental in making accessible collections that would otherwise be neglected. This is the grass roots of archival work and it would be useful to quantify the added value of this activity to services' statistics. It is equally important to cite it as evidence of how communities of volunteers are interacting with professionals while giving back to their own and wider communities too.

13. Thematic projects are likely to focus on more cross-cutting approaches and agendas, and are therefore important in supporting strategic and partnership initiatives. These lend themselves to wide publicity and marketing and to some serious profile-raising for the services involved – and hence for the wider archival sector. Many of the 25 thematic projects, which arguably are the most outward-facing, were based in local authority services.

14. Projects that have a specific focus, and often a time limit can require different management techniques from open ended ones, for example managing finance and/or deadlines. As the project model for volunteering develops, so the ways in which volunteers and projects are handled is likely to evolve. The availability of guidance in support of this type of project would be useful.

## Conclusions

Volunteering currently provides a substantial contribution to the development of the archive sector and to the accessibility of archival resources to the wider public. It appears that while the profile of volunteers themselves is remaining fairly constant when compared with Ray's findings in 2009, volunteering as an activity in archives is changing.

- The direction of travel is towards expansion both in terms of volunteer numbers and range of activities.
- There is an increasingly proactive and business-like approach to managing volunteers, with volunteers becoming a regular part of the archival community.
- There is evidence that some services are providing better support for volunteers, improved training, and wider opportunities and activities.
- Standards have risen in many areas of activity, with volunteers keen to enhance and develop their skills and experience, and policies (e.g. cataloguing) being adjusted to support their work.
- Volunteers contribute substantially to 'professional' work (e.g. cataloguing) albeit in generally carefully supervised environments and sometimes at a low process-based level.
- While challenges remain, the sector-wide evolution and expansion of volunteering provides the opportunity to develop standardised approaches to common issues and practices.

## Recommendations

This data suggests the following recommendations be implemented in order to support the continuing evolution and expansion of volunteering.

**Recommendations for services hosting volunteers:**

1. Institute organisational frameworks for volunteering: e.g. develop volunteer policies, include volunteer contributions in business plans, adopt models for quantifying volunteer contributions, and implement volunteer/service agreements. Compliance with this recommendation fulfils the Accreditation Standard 1.6 Resources: Workforce.
2. Develop a proactive approach to volunteering: e.g. forward planning to ensure tasks/projects and the resources required are identified before volunteers are recruited.
3. Identify sources of support and/or finance: these may range from the person responsible for organisation-wide volunteering; to the ARA, Institute for Volunteering Research, Museums Association, HLF or National Cataloguing Grants Scheme.
4. Identify the appropriate status and role, and source appropriate training for volunteer supervisors/managers: e.g. in people management, project management, managing budgets, health and safety, legal issues, insurance, quality checking and evaluation, data gathering, and managing service and volunteer expectations.
5. Define volunteer recruitment processes and training: e.g. methods for widening the diversity of volunteers, identification of required knowledge and skills, appropriate training for identified tasks, volunteer agreements and induction.
6. Identify manageable ways of recording activity and experience: e.g. numbers and FTEs of volunteers; volunteer hours contributed weekly, monthly, annually; quantify volunteer contribution in financial terms using recognised models; understand volunteer experience; descriptions of work that would not otherwise have been done; use CIPFA statistics for local authority data.
7. In tandem, plan how such recorded data can be advantageously used: e.g. to enhance profile, influence funders and leaders, evidence better service delivery, use in marketing plans, improve use of volunteers, and their experiences and to reach out into different communities.

**Recommendations for ARA:**

1. Continue to monitor regularly the nature and management of volunteers and volunteering in archives being mindful of what is happening in allied sectors (e.g. museums and libraries) in order to maintain currency of knowledge and understanding.
2. Continue to make the annual Volunteering Award in order to encourage the development of quality volunteering in the sector (about 25% of survey respondents had entered for this).
3. Support The National Archives in its provision of advice to services seeking to involve volunteers in externally funded projects; in particular in ensuring recognition of volunteer contributions as in-kind support in HLF applications.
4. Encourage proactive alignment of volunteer management with Accreditation and Competencies initiatives, for example through recognition of standardised practice; enhancing CPD for professionals working with volunteers, and providing opportunities for recognition of volunteers' own skills where appropriate.
5. Continue to recommend standardised approaches to procedures and practices that facilitate more consistent methods and enable better strategic understanding of volunteer

management and activities and recommend these: e.g. volunteering policies, business planning, recruitment, volunteer agreements, and data gathering.

6. Develop and recommend models and standards (or identify existing ones) for data gathering: e.g. volunteer numbers, FTEs, hours contributed, activity contributions, measuring financial equivalence.

7. Identify where training might be offered in some of the procedures, practices and data gathering noted above and/or in other areas such as people management, project management, managing budgets, health and safety, legal issues, insurance, quality checking and evaluation, managing expectations.

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## 1.      Introduction and objectives

In its Policy on Volunteering (2011) the ARA acknowledged the contributions that volunteers make in supporting archives, enhancing the preservation of and access to collections and helping to strengthen links with communities. It also described its commitment to providing a voice for volunteers and to encouraging the diversification of volunteering opportunities for them.[1]

The ARA's Public Services Quality Group (PSQG) Sub-Committee on Volunteering is delivering this policy by developing, monitoring and disseminating information about volunteering activities, encouraging partnerships and sharing good practice within the sector.

This report contributes to delivering  the Sub-Committee's 2012-14 Action Plan, which has been developed alongside TNA, Welsh Government (CyMAL: Museums Archives and Libraries Wales)  and the Scottish Council of Archives. In particular it aligns with item 4 'Improve evidence gathering and evaluation', specifically the action 'Scope project to gather evidence of types of work undertaken by volunteers'.

Substantial work on evidence-gathering has already been undertaken and is described in the literature review below. The focus of this study is to contribute to this evidence-base of knowledge and information about the management of volunteers and the contribution they make to the sector. While there is already some useful material available relating to case studies, the aim here is to build a broader picture of the types of volunteering currently undertaken in archives in the UK and Ireland.

The key methodology for information gathering has been an online survey that aimed to establish the nature of organisations and services that engage volunteers, the profile of these volunteers, how services manage them and the types of tasks, projects and activities that they undertake. It is

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[1] Policy on Volunteering (2011)  available at http://www.archives.org.uk/campaigns/volunteering.html

anticipated that the outputs of this work will enable the Volunteering Sub-Committee to provide guidance on the many different volunteering opportunities, management models, activities and roles that services might adopt and adapt to their own circumstances.

## 2.     Literature review

A number of fact-finding surveys have preceded this one.  The Institute for Volunteering Research (IVR) is a research and consultancy agency specialising in volunteering. This current survey was informed by its report *Volunteers in the Cultural Sector in England* undertaken in 2002.[2] Its evidence bank contains a searchable database of publications, reports and articles. Although those relating to archives and museums are not recent they are useful, as are the wider discussions of 'Big Society', volunteer management and volunteer experience.[3]

In 2005, commissioned by the Museums, Libraries and Archives Council, the IVR produced *Volunteering in Museums, Libraries and Archives* to map and evaluate the role and development of volunteers in the museums, libraries and archive sector in 2001 and 2005.[4] Among other statistics, it found that 83% per cent of organisations involved volunteers compared with 75% in 2001. 95% museums involved volunteers compared to 79% of archives and 67% of libraries. Annual statistics for volunteering in local authority archives are available from CIPFA.[5]

Louise Ray produced a report for the National Council on Archives *Volunteering in Archives* (2009).[6] This provided considerable insight into the extent of volunteering in the archive sector, which involved undertaking a survey of volunteers' own experiences that gained over 400 responses. The 'Further Reading and Information Sources' section of that report (pp. 58-9) describes a range of sources that will not be repeated here.

The Museums Association invests heavily in supporting volunteers and volunteer management. It provides advice, case studies, careers advice, information about the benefits of volunteering, the effect on professional staff and the importance of avoiding the 'slippery slope' that allows volunteers to replace staff. Its publications the *Museums Journal*  and  *Museum Practice* include information potentially useful to archivists: the latter devoted an issue to volunteers in 2010, covering  such issues as recruiting volunteers, developing a volunteer policy, legal obligations and a number of case studies.[7]  However it is necessary to be a member of the Association in order to access these resources.

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[2] David Chambers *Volunteers In The Cultural Sector In England* (January 2002) Institute for Volunteering Research available at http://www.ivr.org.uk/component/ivr/volunteers-in-the-cultural-sector
[3] Institute for Volunteering Research http://www.ivr.org.uk/
[4] Steven Howlett, Joanna Machin and Gertrud Malmersjo, *Volunteering in Museums, Libraries and Archives* (December 2005) Institute for Volunteering Research available at http://www.volunteerspirit.org/files/volunteer_survey_2006_9500.pdf
[5] CIPFA  http://www.cipfa.org/policy-and-guidance/publications/a/archive-services-statistics-201213-actuals-pdf
[6] Louise Ray *Volunteering in Archives: A Report for the National Council on Archives* (June 2009) available at http://www.archives.org.uk/images/documents/volunteeringinarchivesfinal.pdf
[7] Museums Association http://www.museumsassociation.org/museum-practice/volunteers

In addition to the published sources described above, details of a number of unpublished case studies are also available.  These are derived from the applications to the ARA's annual Volunteering Award which has been running since 2010.  Over the last four years there have been 38 submissions for this award and in each case applicants have been required to describe their project, its aims, target audience, partners, process, numbers of participants in /visitors to the project, its impact and outcome, an evaluation, and identification of social groups and social outcomes impacted by it. Of the 38 organisations 27 were local authorities (3 in partnerships with specialist archives/museums), 5 were specialist archives, 4 national organisations and 2 universities. This is rich information that would reward further analysis. 24 from this group have responded to the current survey.[8]

## 3.      Methodology: the survey and case studies

A survey was developed in order to add broader data to existing information and was compiled in consultation with the PSQG Volunteering Sub-committee. It was intended to enable largely statistical, but also to allow substantial qualitative data to be generated. A number of sources were investigated in order to inform the content of the survey questionnaire for this current research.  In order to enable longitudinal findings and comparisons to be made it was proposed to use the types of questions that had been used in previous surveys, in particular those noted above (Chambers (2002); Howlett *et al* (2005); and Ray (2009)).

The basic fact-finding survey was addressed to employers and managers who were involved in the recruitment and management of volunteers in their archives, records management and conservation services.

The survey comprised 44 questions divided into the following sections:
   A.  Your organisation and service (Q1-7)
   B.  Volunteer profile (Q8-17)
   C.  Managing volunteers (Q18-33)
   D.  Volunteer tasks, activities and projects (Q34-44)

A full list of the questions is provided in Appendix B.

The survey was available online on Survey Monkey from 14 August to 11 September 2013. It was advertised on ARA Today and via 7 JISC mail lists.[9]  A range of professional associations and ARA groups agreed to circulate to their members and encourage participation in the survey.[10]

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[8] Details of some available on ARA website http://www.archives.org.uk/campaigns/volunteering-awards.html
[9] Archives-NRA; Records Management; Higher Education Archivists; Campaign for Voluntary Sector Archives; Scottish Universities Special Collections and Archives Group; Welsh Government (CyMAL: Museums Archives and Libraries Wales); Archives-Wales; Museum Information and Records Management; Volunteer Co-ordinators Network.
[10] Archives and Records Association; Information and Records Management Society; Museum Librarians and Archivists Group; Museums and Galleries Archivists Group; Charity Archivists and Records Managers; Historic Houses Archivists' Group; Religious Archives Group; Health Archives and Records Group; School Archivists Group; Records Management Group; Group for Literary Archives and Manuscripts; Public Sector Quality Group; Chief Archivists in Local Government; Scottish Council on Archives; Archives and Records Council Wales (ARCW); Business Records Group; Business Archives Council; Business Archives Council Scotland; National

To supplement the survey research was undertaken to identify two recent and innovative case studies to highlight the changing face of volunteering. Two contrasting studies were found: these were volunteer projects being undertaken at Cumbria Archive Service and at the Pennine Horizons Digital Archive (PHDA). Each was innovative in a different way. In Cumbria a project involving volunteers in the relocation of the archives led to the service adopting a completely new, proactive and business-like approach to the use and management of volunteers. At the PHDA what was new was the fact that the archive is completely digital, with the workforce almost entirely comprising volunteers.

Further details of these two case studies are available in Appendix G.

## 4. Findings and Analysis

### 4.1 Introduction

The detailed findings generated by the survey can be found in the Appendix A. They are presented there in the order of questions asked in the survey. The analysis in this section is organised thematically, based on the four survey sections.

There were 135 replies to the survey which, once duplicates and those lacking data were eliminated, resulted in 100 valuable useable responses. 27 of those eliminated from the 135 comprised only names, addresses and contact details, but further investigation showed that fuller data had been submitted but had not been saved, whether due to a system or respondent error. These 27 are identified in the Appendix D. Overall the data provided was good in both qualitative and quantitative terms, though a little caution is necessary in interpreting some minor aspects of the latter.

### 4.2 Respondent numbers and participant organisations and services (Q 1-7)

As anticipated the majority of responses (45%) were received from local authority archives, mainly in England but with good representation from Scotland and Wales. Public and private sector specialist archives (27%) ranged from schools, colleges and dance organisations, cathedrals and chapels, and institutes and societies to media and the National Trust. Universities were well represented (15%) as were national libraries and archives, and museums (11%). 2 responses came from business archives. In terms of national responses, 14 were received from Scotland and the Islands, 9 from Wales and 77 from England. [11]

It is apparent that in terms of organisational approaches both public and private sectors are investing in volunteering; however more information is needed about practices in the business archive sector.

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Archives: TNA, NRS, NLW and Welsh Government (CyMAL: Museums Archives and Libraries Wales), PRONI, NA Ireland.

[11] Details of participant organisations and broad volunteer numbers are provided in Appendix C.
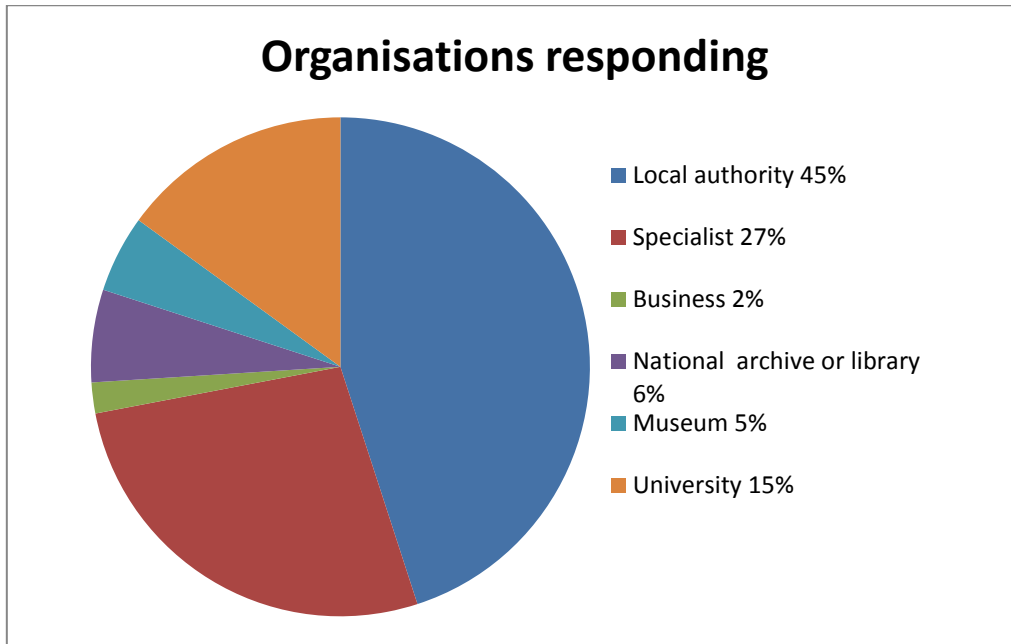
**Chart 1. Respondent numbers and sectors**

## 4.3    Volunteer profile (Q 8-17)

Details of organisations' motivations for involving volunteers, the numbers they engaged, together with a profile in terms of their age, gender, ethnicity, and ability/disability provided basic data for this study. Information about the type and purpose of volunteer placements and the number of years and hours volunteers had contributed to the service help to fill out this picture.

*Motivation*
There is always an implicit tension in involving volunteers in the workplace due to the 'paid' and 'unpaid' relationship that inevitably exists, together with on-going discussions about what activities are considered appropriate for professional employees and what are appropriate for volunteers.  In teasing out service motivations respondents were given six statements to place in order of priority: responses provided a clear indication that volunteers are perceived to add value, and not to undertake core services.

Nearly half (49%) said that their key motivation in involving volunteers was that it allowed them to do things they could not normally do.  This is a very strong indicator.  While some respondents thought that volunteers both promote user involvement and give work added value (each 18%), the notion that volunteering gives people a route to employment was a priority for 10% of respondents. It is not possible to establish which type of service prioritised this last statistic since this information was not specifically sought, but it is likely to be those that host placements for students wanting to enter archival or other heritage professions. Surprisingly only 3% prioritised 'increases diversity' as their key motivation.

A very small number prioritised 'saves money' as a motivation (2%) which clearly reinforces the overall finding that services are using volunteers to enhance their existing provision rather than

replacing funded posts or services. This might indicate that funding cuts, for example in local authority services, have not significantly impacted here. The matrix showing the range of responses is available in Appendix A.

*Volunteer numbers*

| Number of volunteers | Responses | Responses % |
|---|---|---|
| 0-10 | 43 | 43.43% |
| 11-20 | 23 | 23.23% |
| 21-30 | 11 | 11.11% |
| 31-50 | 12 | 12.12% |
| 51-70 | 6 | 6.06% |
| 71-100 | 3 | 3.03% |
| 100+ | 1 | 1.01% |
| Total | 99 | 100% |

**Table 1. Volunteer numbers**

According to these figures 66 (65%) of services responding have up to 20 volunteers annually, with 23 (23%) having between 21 and 50. 11 services (including TNA who responded separately) (11%) host over 50 volunteers.[12]

Further analysis of the data shows that a sectoral pattern emerges here. Local authority services are fairly evenly spread across all volunteer number categories, and clearly have more volunteers than any other sector. Specialist archives have noticeably fewer volunteers per service, with 23 of these hosting 20 volunteers or fewer. The majority of universities (12) have 10 or fewer volunteers.

It is not surprising that the greatest number of services host between 1 and 10 volunteers. Analysis shows that this cohort is spread fairly evenly between local authorities (11), universities (12) and specialist repositories (14). At the other end of the scale the 11 services hosting over 50 were predominantly local authority (7) and national organisations (2).

Data was sought on the number of hours that volunteers contributed weekly. However the return on this was slightly suspect. A few of the 93 respondents appear to have provided numbers of volunteers rather than of weekly hours worked, and one or two made more than one response. The figure reached, 4419 hours weekly, can therefore only be taken as a broad indicator, but is impressive nevertheless. A standard way of recording such information would enable a more reliable interpretation to be generated.

*Placement types and volunteer profiles*
There is a range of placement types to suit different volunteer profiles and requirements. The survey found that from a total of 1676 placements the greatest number of volunteers (59%) was

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[12] See Appendix C for broad numbers of volunteers.

hosted in generic placements usually associated with 'social' volunteering, whether as individuals or part of a project. However a substantial minority undertake placements for one of a number of purposes:

- 12% to access university archive/records management programmes
- 10% to enter heritage professions
- 7% for school work experience students
- and 5% placements not linked to heritage careers; 4% for those with post-qualification experience; 3% for FE/HE college students.

The term 'intern' was not used in the survey, although some comments do refer to the effect that the recent debate within the UK archive sector, primarily via the archives-nra e-list, regarding the proper boundaries between paid and unpaid placements has had on their practices.

Predictably perhaps, most volunteers are at the older end of the age spectrum, with 59% being over 55. However while ages remain at the older end the profile is younger than the comparable figure in 2009, which was 67% over 55. The next largest group (17%) is in the 18-24 age group, suggesting that this represents students and others seeking work experience.

This raw data indicated that the total number of volunteers in the 93 services responding to this question (Q11) as 2500 (See Appendix A). However since this question did not specifically seek such specific quantitative data this would need further substantiation.



**Age of volunteeers**

- 18-24 = 501 (20%)
- 25-34 = 202 (8%)
- 35-54 = 330 (13%)
- 55-74 = 1217 (49%)
- 75+ = 250 (10%)
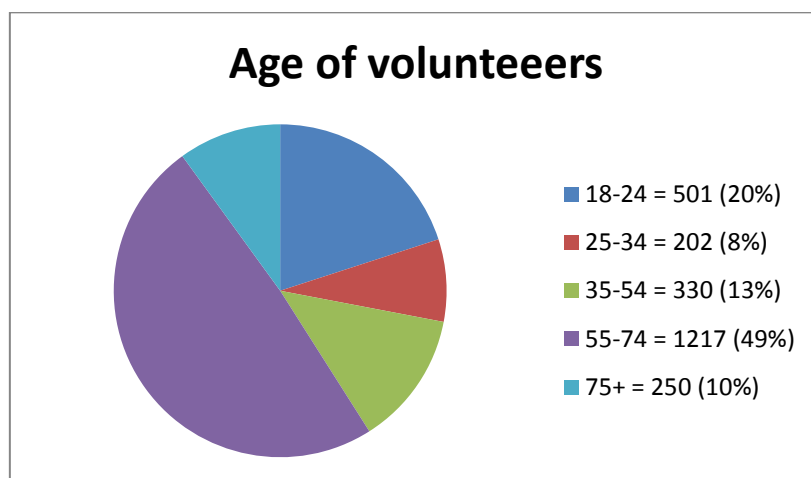
**Chart 2. Age of Volunteers**

In terms of gender, 63% were female and 37% were male. This compares consistently with Ray's 2009 report where the comparative figures were 64% and 36%.

Ethnically, an average of 97% volunteers was white, with black and Asian at about 2.5% and other at 0.5%. Percentages rather than actual numbers were supplied, but closer analysis shows that while there is an urban concentration of black and Asian, particularly in London, rural counties are also well represented.

Although 'increasing diversity' was not seen as a key motivation, 46 services said they hosted volunteers with a disability. Percentages rather than actual numbers were supplied: thus between 2% and 33% were cited as having disabilities against a national figure for the population of Great Britain in 2010/11 of 17.6%.[13]

Degrees of longevity of volunteering can indicate levels of loyalty and satisfaction in volunteers and 48% of archives services had volunteers who had been with them for 11 years or longer. That 98% of services also had volunteers who had been with them for less than 5 years , shows a broad pattern of recruitment.

In broad terms it would appear that the profile of volunteers is not dissimilar to that in 2009. There is a small indication that specific placements are replacing some general social volunteering opportunities.

## 4.4    Managing Volunteers (Q18-33, 41)

One of the incentives for seeking new evidence is the value of discovering the degree to which the management of volunteers, as well as their profile is changing and in what ways.

### *Management policy and structure*
Evidence of commitment to proactive volunteer management can be found in the degree of its integration within the wider service.  The existence of a volunteer policy is a basic indicator and 89% of respondents said they had one (compared with 75% in 2009 (Ray p.28)).  While most were either based on a parent organisation's policy or a service specific one, only two services had made use of such recommended models as the Investing in Volunteers nine indicators and the Institute for Volunteering Research's Compact Code of Good Practice on Volunteering . [14]

A further indicator that volunteering is robustly embedded is the inclusion of volunteer tasks in a service's business plan and in well over a third of services (39%) this is the case.  Some (although fewer at 23%) regularly attempted to quantify the contribution of volunteers in financial terms too.[15] A range of methods for doing so was described, some providing figures, others the number of hours, and others again using HLF or other figures and values for comparable daily rates of pay (skilled, unskilled etc.). Some consistency of approach would enable clearer comparisons to be made.

The nature of the personnel appointed to oversee the volunteer function can also provide a measurement of a service's commitment.  Survey findings indicated that 31% had a specific person whose overall responsibility was the management and deployment of volunteers, with just under half of these having the word 'volunteer' included in the role title, most commonly 'Volunteer Co-ordinator'. This last group is found in a range of services, about half being in local authorities. It

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[13] Office for Disability Issues http://odi.dwp.gov.uk/docs/res/factsheets/disability-prevalence.pdf
[14] Investing in Volunteers http://iiv.investinginvolunteers.org.uk/about/the-nine-indicators; Institute for Volunteering Research  http://www.ivr.org.uk/component/ivr/the-compact-code-of-good-practice
[15] Annual figures were provided by TNA, the National Library of Wales, 3 local authorities and the Shakespeare Birthplace Trust. Figures ranged from £350,000 to £21,604.

might be expected that such named roles predominate where numbers of volunteers are high: in fact they are quite evenly spread, with 2 services with only 1-10 volunteers having such a person. [16]

In general, however, a range of models was adopted. For some (27%) a member of staff was specifically designated to manage volunteers as part of a wider role, while for others (28%) the responsibility for volunteers was shared among staff. In only 19% the responsibility was not specifically defined or designated. Evidently those responding to a survey of this kind are already likely to have some commitment to volunteer management, but this is an encouraging statistic. However there is work to be done to support those services where the responsibility has yet to be more clearly defined.

The role of managing volunteers and their work requires a range of skills beyond the merely supervisory. On top of professional archival knowledge and skills it involves sympathetic people management along with some knowledge of human resource, health and safety and legal and financial issues.

***Recruitment and training***

| Answer Choices | % |
|---|---|
| Volunteers approach us | 88% |
| Word of mouth | 74% |
| Links with educational establishments (e.g. student placements) | 61% |
| Friends or other groups | 44% |
| Advertisements in the organisation | 39% |
| Intermediary organisations (e.g. volunteer bureaux) | 23% |
| Advertisements in the press | 17% |
| Total Respondents: 96 | |

**Table 2. Methods of recruiting volunteers**

The table shows that informal methods are still the most usual for volunteers to join a service. (Indeed the figure in Ray (2009) was 44% for 'volunteers approach us'). This does not necessarily indicate a reactive rather than a proactive approach on the part of archive services, but it is worth considering whether these less formal methods are accompanied by a more casual approach to systems and processes.

Volunteers are recruited largely as individuals (97%) though a number of services also take people from existing organisations too (26%) such as NADFAS or local societies. Group recruitment to work on a specific project (from cataloguing and preservation to digitisation and oral history) was undertaken by just under half of respondents (46%)

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[16] Volunteer Co-ordinators at National Library of Wales, East Sussex Record Office, South West Film and Television Archive, Wolverhampton City Council, Royal Botanic Gardens Kew, Glasgow Women's Library and Teesside Archives; Volunteer Officers at Northamptonshire Record Office and National Railway Museum; Volunteer and Engagement Officer at Pennine Horizons Digital Archive; Volunteer Development Manager at Peterborough Archive Services; Head of Volunteering at The Children's Society; Work Experience Co-ordinator at Hull History Centre; Education and Community Development Officer at Devon Heritage Services.

There continues to be a ready supply of volunteers: most people think it is easier than or at least as easy as ever to recruit, with only 6% saying that it is harder. Perhaps this accounts for the fact that only 23% of services operate succession planning when volunteers leave. The encouragement that volunteering receives in all aspects of society, the growth in numbers of active retired people seeking meaningful roles and the increase in redundancies are all seen as contributing to this. For many (60%) the only constraint on recruiting more volunteers was the lack of space and/or other resources necessary for managing them.

*'As an organisation, we have become more receptive to volunteers over the last 5 years and the systems we have in place now make it easier to recruit. Our growing reputation for hosting volunteers has meant that numbers coming forward have grown. Word of mouth plays a significant part in our recruitment of volunteers...' (County archive)*

*'But we would only ever recruit volunteers for a specific role. You cannot just be 'a volunteer'. (City archive)*

There is clear recognition of the importance of training and valuing volunteers. While nearly all services provide training (96%) and a formal induction (82%) a minority (44%) pay volunteer expenses. Despite high levels of training, fewer formally evaluate and quality check their volunteers' work (72%).[17] Where this is done it varies from spot-checking to formal regular reviews done usually by staff members, but occasionally by volunteers themselves. Most highly prioritised for checking was cataloguing work, oral history transcriptions and the quality of digitised images.

An interesting but not necessarily typical comment provides a rare insight (among the evidence gathered in this survey) into tensions that can arise:

*'Not in a formal way, but informally. It has become clear that formal checking does nothing but alienate volunteers, but picking up issues as they occur and offering friendly advice, and keeping constant watch seems to be the only way of ensuring consistency of work. Volunteers are wont to decide (despite guidelines given to them) that they know best, sometimes with potentially disastrous consequences.' (Charitable organisation)*

Rewards are given to volunteers in a number of ways: thank you events being the most common, but various discounts, certificates, small gifts and free refreshments are often included too. Showing appreciation for their work was highlighted as of core importance.

Volunteers represent a substantial investment by archive services, which investment is clearly well appreciated both by services and volunteers themselves. While the survey did not seek to establish whether there was any kind of informal agreement between services and individual volunteers (e.g. around hours to be contributed, amount and/or type of work done, attendance), services might consider whether such agreements are worth having in order to optimise the experience for volunteer and service alike.

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[17] One person allocated approximately 1 hour line management for every 10 hours volunteering.

*Changing numbers and use of volunteers*

| Answer Choices | % |
|---|---|
| Number of volunteers has increased | 79% |
| Number of volunteers has decreased | 9% |
| Volunteers are involved in a wider range of activities | 53% |
| Volunteers are involved in a more restricted range of activities | 2% |
| Other changes or developments | 12% |
| Total Respondents: 90 | |

**Table 3. Changing use of volunteers**

It is clear that the direction of travel is towards expansion both in terms of volunteer numbers and range of activities. It is not possible to establish whether the expansion in the range of activity is typical of any particular type of archive, nor do the additional comments enlighten here. However one person noted that the move to a new building was the cause of reviewing the provision, nature and format of volunteering; another that growth in skilled volunteer numbers is a result of a raised profile.

There is evidence from the responses that a more conscious and focused approach to engaging volunteers had developed and that they had generally better support, training, opportunities and a more developed programme.  Standards had risen in all areas of activity, with volunteers keen to enhance and develop their skills and experience, and policies (e.g. cataloguing) had been adjusted to support work for future volunteers.[18]

On the other hand patterns were also changing. One or two said that a result of taking more graduates looking for pre-archive and/or heritage course work experience, and students on work placements was a reduction in placements for general volunteers and school age students wanting to study history at university.

 *'As the project has developed and our profile has raised so we have been able to attract a growing number of skilled volunteers'.  (Charitable organisation)*

*'Having an established Archive Trainee Post cuts down on tasks we can offer to volunteers.'(City archives)*

*Challenges*

In terms of management nearly all (95%) respondents agreed that the greatest challenge to services in managing volunteers is its time consuming nature and most (60%) noted that it required appropriate resourcing.  However at the same time the lack of a specific volunteer manager was an issue for only 25% which would seem to indicate that processes are being reasonably well managed.

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[18] Comments from Royal Voluntary Service Archive & Heritage Collection, Cornwall Archives and Cornish Studies; Hull History Centre, Mills Archive Trust, The National Trust.

But given that 82% find that the quality of work can be variable there is clearly still room for improvement in terms of resourcing training and quality checking.

The recent debate about the development of 'interns' in some organisations has drawn attention to the importance of distinguishing between paid and unpaid, volunteer and professional roles. It was reassuring that only 12% said there was any resistance from paid staff or job substitution issues. Some people noted problems relating to timekeeping, volunteer expectations, lack of IT skills in older volunteers, the difficulty of recruiting people with the specialist skills and knowledge required for a particular project, collaboration with IT departments about logons and rules about leaving school children alone with staff.

*'Current debate about definition of volunteers/interns/paid posts has caused us to suspend recruiting volunteers while policies are reviewed.'(National archive organisation)*

## 4.5    Volunteer tasks, activities and projects (Q33-44)

Detailed analysis of volunteering roles and activities provides a rich picture both of the contributions of volunteers and the context in which they are made. It became apparent that while nearly all services involve on-site working about a third takes place both on and off-site, usually at home. Home working normally involved data inputting, cataloguing digital images and so on.

*Tasks*
A question which sought to establish what general (as opposed to archival) tasks were undertaken generated a good response, with over 60% undertaking secretarial, administrative or clerical work and about half being involved in helping to organise or run events and slightly fewer giving advice/information. The richest response however came in response to a question about what specific archival tasks were undertaken.

| Tasks and roles | % |
|---|---|
| Describing records (transcribing, data inputting, indexing, cataloguing) | 93% |
| Conservation and preservation (cleaning, packaging, boxing, condition checking) | 85% |
| Sorting and arranging records | 74% |
| Scanning and digitising | 54% |
| Research and interpretation | 46% |
| Exhibitions/ displays | 36% |
| Profile raising and outreach | 23% |
| Giving advice on family history/archival/records issues | 22% |
| Public events (e.g. giving talks and lectures) | 19% |
| Oral history/reminiscence sessions | 13% |
| Other | 3.0% |
| Total Respondents: 97 | |

**Table 4. Specific volunteer tasks and roles**

A very substantial majority of services engage volunteers in records description, cataloguing, conservation and preservation, and sorting and arranging records, with about half using them for scanning and digitisation projects.  These are heavily process-based activities. Overall, fewer appear to be engaged in the interpretation of archives or in the public profile of the service.  There is an interesting insight here: professional archivists worry about volunteers taking on 'professional' jobs, of which cataloguing is one: however a large number of volunteers do this, under supervision.  It would seem that professionals in fact are more likely to reserve to themselves those aspects of work that directly interface with their users and stakeholders.

It was noted above that volunteer numbers are increasing and volunteers easier to come by.  It is also clear that there has been significant change and development in the tasks and activities undertaken too, with respondents noting in which of these they had seen the greatest development.

| Area of activity | % |
|---|---|
| Cataloguing | 35% |
| Outreach activities, events support, public facing volunteers | 17% |
| Indexing | 13% |
| Conservation activities including preparation for scanning | 11% |
| Digitisation | 9% |
| Inputting data | 8% |
| Research (e.g. identification of photographs) | 5% |
| Use of remote volunteers | 2% |
| Respondents: 63 | |

**Table 5. Developing areas of volunteer activity**

Once again it can be seen that volunteers are becoming more involved in cataloguing and description than in any other activity. It is noticeable though that this response indicates that the involvement of volunteers in outward facing activities is increasing too.

*'Many of our new volunteers are aspiring professionals with an interest in the skills required for a potential career in Archives so they are interested more in the collections management, cataloguing, accessioning side of things than our longer-serving volunteers who tend to have a subject-based interest in local or theatre history.' (Specialist archive)*

 *'As skill level of volunteers has risen so have the levels of task being able to be completed'. (Charitable organisation)*

***Projects***
Any of the tasks described above, and the skills that they require, can form part of project-based volunteering. 93 specific projects were described by 47 services, some hosting between 2 and 4 projects each.  Appendix E provides the titles of all 93 projects.

About a third of projects were undertaken in partnership with either national (e.g. NADFAS, Federation of Family History Societies, National Trust, Great Western Society) or local (e.g. local schools, history or other societies) partners. Some (about a third) had received funding in support of

a project, for example from HLF (in 22 cases), also Welsh Government (CyMAL: Museums Archives and Libraries Wales) grant schemes and National Cataloguing Grants programme.

Analysis of these projects shows that the term 'project' is fairly widely interpreted: some are time-limited while others are clearly long term and on-going. The 93 projects fall into the following 6 categories:

1. ***Named and thematic projects (with archives drawn from more than one source) and probably time limited: 25 (27%)***

Titles such as 'Paved with Living Colour' (Herefordshire Archives), 'Hens Tae Watch Oot Fur' (Glasgow Women's Library), 'Mission to Seafarers' (Hull University) and 'Speaking up for Disability' (West Sussex Record Office) indicate imaginative and broad approaches. 'Unexplored Riches in Medical History' (The Children's Society), 'Vintage Rambert' (Rambert Archive) and 'Hampshire Showpeople' (Hampshire Archives) provide a good indication of project topic and coverage. Four projects focused on remembering WW1 (Wolverhampton City Archives, Herefordshire Archive Service, Wigan Archives and Local Studies, Hackney Archives) while others were organised around community heritage projects such as Gloucestershire Archives' Fielding and Platt (engineering firm) and Charter Court (sheltered housing) initiatives.

2. ***Cataloguing specific archive groups or fonds: 17 (18%)***

In this category the focus of the project was on a specific organisational, institutional or personal archive group, fonds or collection. From Wigan Licensing Records (Wigan Archives and Local Studies), Philip Larkin letters (University of Hull), and Crichton Royal Hospital records (Dumfries and Galloway Libraries, Information and Archives) to a National Trust botanical collection (Dorset History Centre) and a collection of diocesan records (Nottinghamshire Archives) - there was a wide variety of cataloguing projects being undertaken.

3. ***Cataloguing archive series: 19 (21%)***

The cataloguing of specific series was the focus of this category. Medieval and modern property deeds, design registers and 1st World War service records (The National Archives), Swindon Works engineering drawings (National Railway Museum), Lever Brothers photograph albums (Unilever Archives and Records Management) and Leith's architectural plans (Edinburgh City Council) rubbed shoulders with faculties (University of Durham), chapel invoices (King's College Cambridge Archive Centre) and glass plate negatives (Science museum), art reference books (Bowes Museum) and news cuttings for Rampton Hospital (Nottinghamshire Archives). Three local authority services focused on series from Quarter and/or Petty Sessions records (Conwy, West Sussex and Lancashire archives services).

4. ***Physical (relocation, conservation, preservation, digitisation): 23 (25%)***

Volunteers helped in physically relocating archives (East Sussex Record Office, Rambert Archive, Herefordshire Archive Service) and with refurbishment (Porthmadog Maritime Museum).

Digitisation projects (Kingston Heritage Services, UCL Queen Square Library, Archive and Museum) also involved the physical handling of documents.

Many projects were concerned with surveying, cleaning, repackaging, for example the Herbert Read Church Architecture and Bodley Bros Iron Foundry Collections (Devon Heritage Services), and Boards of Guardians (Flintshire Record Office). For a number of local authority services the records of Quarter Sessions were the focus of such preservation (Devon Heritage Services again and Bedfordshire and Luton Archives and Records Service) with Wigan Archives and Local Studies calling their mass project 'Carry on Cleaning'.

Less typical were leading walking tours (Quarry Bank Mill) and Archive Taster Weeks (Royal Bank of Scotland Archive Group).

### 5. Indexing: 6 (6%)

Projects here included indexing City Guilds records (University of Durham), Dean of Guild Court Registers (Edinburgh City Council Archives), wills (Lancashire Archives) and calendars of prisoners (Sheffield Archives).

### 6. Transcription: 3 (3%)

Diaries (Wigan Archives), poll books (University of Durham) and oral histories (Quarry Bank Mill) were the focus of transcription projects.[19]

Focusing projects on the cataloguing, indexing and transcription of specific archive groups or series is instrumental in making accessible collections that would otherwise be neglected. This is the grass roots of archival work and it is crucial to quantify the added value of this activity to services' statistics. It is equally important to cite it as evidence of how communities of volunteers are interacting with professionals while giving back to their own and wider communities too.

Thematic projects are likely to focus on more cross-cutting approaches and agendas and are therefore important in supporting strategic and partnership initiatives. These lend themselves to wide publicity and marketing and to some serious profile-raising for the services involved – and hence for the wider archival sector. In this survey a large majority of the 25 thematic projects, which arguably are the most outward-facing, were based in local authority services.

Projects that have a specific focus, and often a time limit can require different management techniques from open ended ones, for example managing finance and/or deadlines. As the project model for volunteering grows, so the ways in which volunteers and projects are handled is likely to evolve. The availability of guidance in support of this type of project would be useful.

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[19] A full list of projects is available in Appendix E.

***Final comments***

A number of respondents added their own observations and perceptions about the role and value of volunteers

- *Most benefit from volunteers is obtained when their research interests closely map to the needs of the service*
- *It is as important for the volunteers to benefit from the volunteering activity as much as the archive service*
- *Volunteers bring a variety of experience and help support the Council's key objectives: the Director holds the service in high esteem as a result*
- *Long term volunteers become a vital part of services and are accepted generally for the extra valuable contribution they give*
- *Time to set-up and support volunteers can be under-estimated but the numbers accepted are based upon the number that can be supported rather than the numbers applying*
- *The linking of volunteer work to service planning and staff activities/projects is an important step to take, rather than just 'finding things for them to do'*
- *Most requests are now to volunteer one day a week, rather than full-time for a week/two weeks etc. This is usually because volunteers have other (paid) employment.*
- *Volunteers are very valued but there is no doubt they are being used as unpaid staff doing work which should be done by paid professionals; they also take up valuable time of those staff still in post.*

A comment made before ARA produced its statement on interns:

*'We use volunteers for very specific tasks and for limited time frames and hours i.e. scanning a set of photographs one day a week for 3 months. It's work we just would never get round to doing but is hugely beneficial for the benefits we can give to our parent organisation. We would never think of using a qualified archivist to do such work or use volunteers to do skilled work. It is sad to see so many organisations advertise for volunteers/interns for posts that require skill/archive qualification. It would be encouraging to see ARA respond to organisations advertising for such unpaid positions to ensure the archive sector is respected as a serious profession.'(Specialist repository)*

## 5.     Conclusion and recommendations

### Conclusions

Volunteering currently provides a substantial contribution to the development of the archive sector and to the accessibility of archival resources to the wider public.  It appears that while the profile of volunteers themselves is remaining fairly constant when compared with Ray's findings in 2009, volunteering as an activity in archives is changing.

- The direction of travel is towards expansion both in terms of volunteer numbers and range of activities.
- There is an increasingly proactive and business-like approach to managing volunteers, with volunteers becoming a regular part of the archival community.

- There is evidence that some services are providing better support for volunteers, improved training, and wider opportunities and activities.
- Standards have risen in many areas of activity, with volunteers keen to enhance and develop their skills and experience, and policies (e.g. cataloguing) being adjusted to support their work.
- Volunteers contribute substantially to 'professional' work (e.g. cataloguing) albeit in generally carefully supervised environments and sometimes at a low process-based level.
- While challenges remain, the sector-wide evolution and expansion of volunteering provides the opportunity to develop standardised approaches to common issues and practices.

## Recommendations

This data suggests the following recommendations be implemented in order to support the continuing evolution and expansion of volunteering.

**Recommendations for services hosting volunteers:**

1. Institute organisational frameworks for volunteering: e.g. develop volunteer policies, include volunteer contributions in business plans, adopt models for quantifying volunteer contributions, and implement volunteer/service agreements. Compliance with this recommendation fulfils the Accreditation Standard 1.6 Resources: Workforce.
2. Develop a proactive approach to volunteering: e.g. forward planning to ensure tasks/projects and the resources required are identified before volunteers are recruited.
3. Identify sources of support and/or finance: these may range from the person responsible for organisation-wide volunteering; to the ARA, Institute for Volunteering Research, Museums Association, HLF or National Cataloguing Grants Scheme.
4. Identify the appropriate status and role, and source appropriate training for volunteer supervisors/managers: e.g. in people management, project management, managing budgets, health and safety, legal issues, insurance, quality checking and evaluation, data gathering, and managing service and volunteer expectations.
5. Define volunteer recruitment processes and training: e.g. methods for widening the diversity of volunteers, identification of required knowledge and skills, appropriate training for identified tasks, volunteer agreements and induction.
6. Identify manageable ways of recording activity and experience: e.g. numbers and FTEs of volunteers; volunteer hours contributed weekly, monthly, annually; quantify volunteer contribution in financial terms using recognised models; understand volunteer experience; descriptions of work that would not otherwise have been done; use CIPFA statistics for local authority data.
7. In tandem, plan how such recorded data can be advantageously used: e.g. to enhance profile, influence funders and leaders, evidence better service delivery, use in marketing plans, improve use of volunteers, and their experiences and to reach out into different communities.

**Recommendations for ARA:**

1. Continue to monitor regularly the nature and management of volunteers and volunteering in archives being mindful of what is happening in allied sectors (e.g. museums and libraries) in order to maintain currency of knowledge and understanding.
2. Continue to make the annual Volunteering Award in order to encourage the development of quality volunteering in the sector (about 25% of survey respondents had entered for this).
3. Support The National Archives in its provision of advice to services seeking to involve volunteers in externally funded projects; in particular in ensuring recognition of volunteer contributions as in-kind support in HLF applications.
4. Encourage proactive alignment of  volunteer management with Accreditation and Competencies initiatives, for example through recognition of  standardised practice; enhancing CPD for professionals working with volunteers, and providing opportunities for recognition of volunteers' own skills where appropriate.
5. Continue to recommend standardised approaches to procedures and practices that facilitate more consistent methods and enable better strategic understanding of volunteer management and activities and recommend these: e.g.  volunteering policies, business planning, recruitment, volunteer agreements, and data gathering.
6. Develop and recommend models and standards (or identify existing ones) for data gathering: e.g. volunteer numbers, FTEs, hours contributed, activity contributions, measuring financial equivalence.
7. Identify where training might be offered in some of the procedures, practices and data gathering noted above and/or in other areas such as people management, project management, managing budgets, health and safety, legal issues, insurance, quality checking and evaluation, managing expectations.

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Caroline Williams
Independent Archival Consultant
caroline@cmwilliams.org.uk
January 2014

# Managing Volunteering in Archives: Appendices

**Caroline Williams, Independent Archival Consultant**
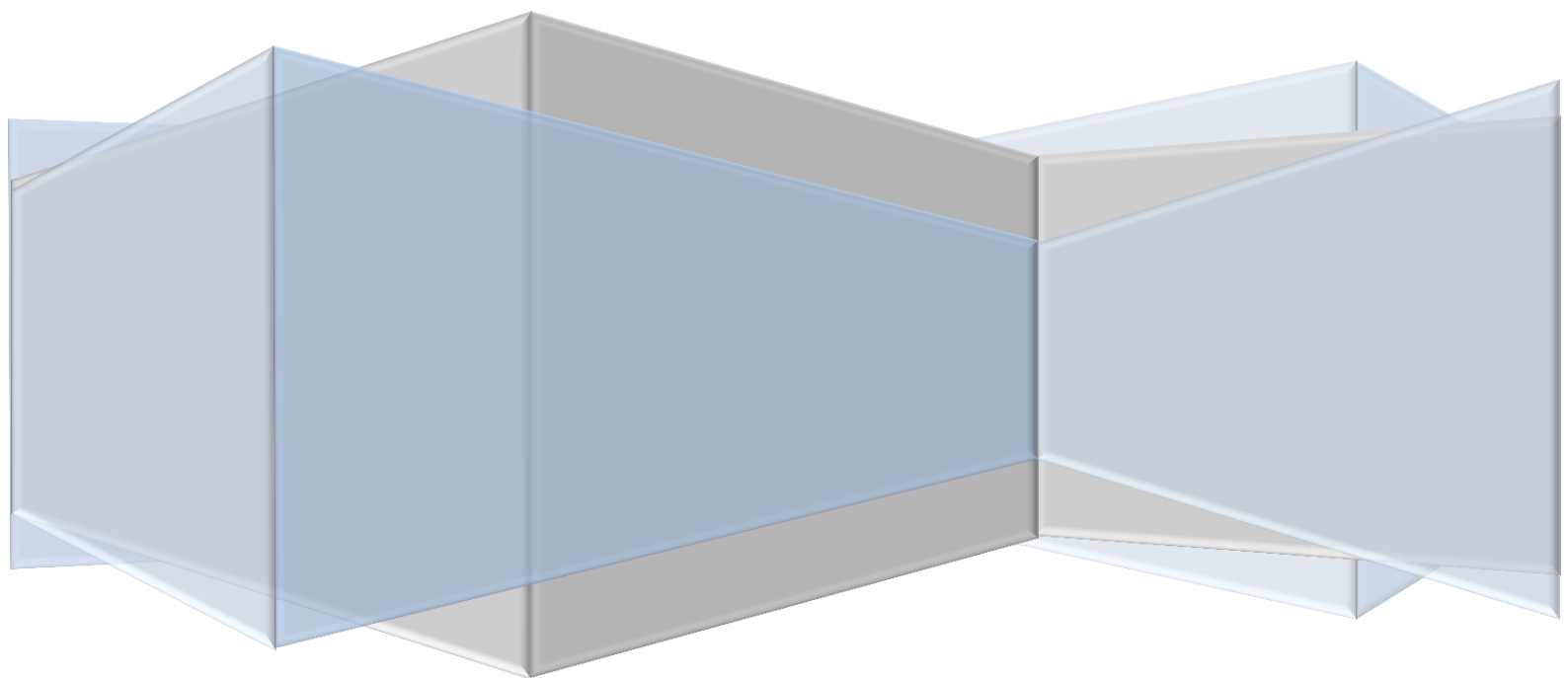
*Archives and Records Association: Managing Volunteering in Archives 2013*

*Appendices*

# Appendix A  Detailed volunteer survey findings

## 1.      Response and data quality

Some 135 responses were uploaded to survey monkey.  Of these, 8 were either anonymous, duplicates and/or lacking any data and were deleted.  27 of those eliminated from the 135 comprised only names, addresses and contact details, but further investigation showed that fuller data had been submitted but had not been saved, whether due to a system or respondent error.

There remained 100 responses, of which 12 were declared by the system to be 'incomplete' but which contained sufficient useful data to make the final cut.

The findings and analysis are therefore based on 100 responses to the survey, bearing in mind that not all respondents provided answers to every question.  The quantitative data provided from these responses is very sound, with caution needed in the interpretation of only minor aspects of it, for example the assessment of hours worked by volunteers.  Qualitative data is excellent, providing opportunities for application in a number of ways.

## 2.      Respondent numbers and participant organisations and services (Q 1-7)

Questions 1-7 sought information about the identity, role or position, and email address of the person completing the survey, together with the name of the organisation, archive (or other) service, its postal address and website url. There was 100% response to most of these questions apart from the name of the archive service where it was identical to that of the parent organisation.

In terms of national responses, 14 were received from Scotland and the Islands, 9 from Wales with the remaining 77 from England. Chart A shows the sectoral breakdown of responding organisations.
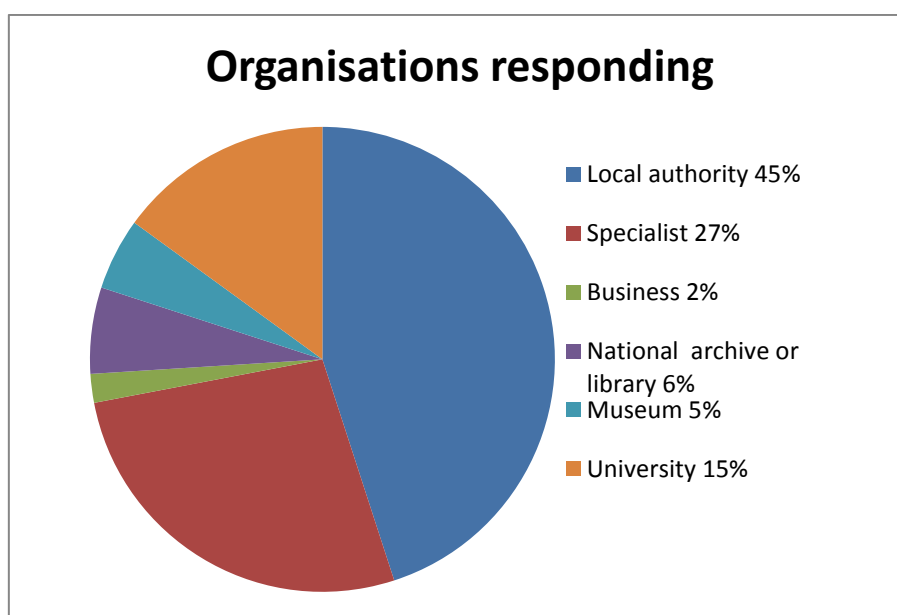


**Chart A. Respondent numbers and sectors**

A further breakdown of responses shows that of the 45 local authority responses 7 came from Scotland and 6 from Wales; and of the university responses 2 came from Scotland.

The specialist archive category included royal colleges (3), schools (3), dance organisations (2), National Trust (2), cathedral and chapel archives (3), institutes and societies (3) with media, health, voluntary, specialist national museum, library and digital archives being represented.

A list of the 100 responding organisations whose data is included in the analysis is available in Appendix C.

Brief analysis of the job title of respondents identified:
- 13 with director, principal, keeper, curator, head, city, company in their title
- 31 with manager or officer in their title
- 8 senior archivists
- 30 archivists
- 5 assistant archivists

- 4 librarians
- 2 conservators
- 1 each senior curator, unemployed, honorary archivist and an individual volunteer
- 5 included 'volunteer' in the title:  volunteer manager, officer or project co-ordinator, plus one community engagement co-ordinator.[20]

Such analysis tends to obscure the variety of roles/positions undertaken, however it is clear that this ranged across conservation, access, collections and outreach, local studies, culture, cataloguing, librarianship, curatorial work, community and education, information and records management, and project based work.

## 3.      Volunteer profile (Q 8-17)

This section sought to identify organisations' motivations for involving volunteers, the numbers they engaged, together with a profile in terms of their age, gender, ethnicity, and ability/disability. It also requested information about the type and purpose of volunteer placements and the number of years and hours these had contributed to the service. Findings are presented roughly in the order that the survey questions were asked.

***In what order of priority would you rate the relevance of the following reasons for involving volunteers? (Q8) (100% response)***

| | 1 | 2 | 3 | 4 | 5 | 6 | Total |
|---|---|---|---|---|---|---|---|
| **Allows us to do things we could not normally do** | 49%<br>49 | 19%<br>19 | 16%<br>16 | 9%<br>9 | 4%<br>4 | 3%<br>3 | **100** |
| **Gives our work added value** | 18%<br>18 | 19%<br>19 | 32%<br>32 | 18%<br>18 | 10%<br>10 | 3%<br>3 | **100** |
| **Gives people a route to employment** | 10%<br>10 | 18%<br>18 | 25%<br>25 | 28%<br>28 | 14%<br>14 | 5%<br>5 | **100** |
| **Increases diversity** | 3%<br>3 | 6%<br>6 | 5%<br>5 | 19%<br>19 | 49%<br>49 | 18%<br>18 | **100** |
| **Promotes user involvement** | 18%<br>18 | 34%<br>34 | 19%<br>19 | 18%<br>18 | 9%<br>9 | 2%<br>2 | **100** |
| **Saves money** | 2%<br>2 | 4%<br>4 | 3%<br>3 | 8%<br>8 | 14%<br>14 | 69%<br>69 | **100** |

**Table A. Motivating factors in engaging volunteers**

Table A indicates the order in which respondents placed their priorities:

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[20] These were at West Sussex RO, Northamptonshire RO, South West Film and Television Archive, National Library of Wales, Nottinghamshire Archives.  The Community Engagement Co-ordinator was at the Shakespeare Birthplace Trust.

1. Allows us to do things we could not normally do - 49%
2. Promotes user involvement – 18%
3. Gives work added value – 18%
4. Gives people a route to employment – 10%
5. Increases diversity – 3%
6. Saves money – 2%

***How many volunteers does your service involve in total annually? (Q9) (99 responses)***

| Number of volunteers | Responses | Responses % |
|---|---|---|
| 0-10 | 43 | 43.43% |
| 11-20 | 23 | 23.23% |
| 21-30 | 11 | 11.11% |
| 31-50 | 12 | 12.12% |
| 51-70 | 6 | 6.06% |
| 71-100 | 3 | 3.03% |
| 100+ | 1 | 1.01% |
| Total | 99 | 100% |

**Table B. Volunteer numbers**

It is recognised that it can be difficult to be specific in fluctuating situations: as one person commented it was 'Difficult to give accurate figure as some people only volunteer for short periods of time'. Although the question asked for numbers of volunteers it is possible that some people counted this in terms of FTE.

A breakdown of responses by organisation is included in Appendix C.

Further analysis of the data shows
- 2 services had 100 or more volunteers: The National Archives (TNA) with 220 and Gloucestershire Archives with over 100. (TNA's details were sent separately.)
- The 3 services that host 71-100 volunteers were Hull History Centre, Lancashire Archives and the North of England Institute of Mining and Mechanical Engineers.
- The 51-70 group were the National Library of Wales,  4 local authority archives, and 1 university
- The 31-50 group comprised 7 local authorities, [21] 2 museums (Bowes and National Railway Museums), 1 National Trust (Quarry Bank) , Canterbury Cathedral Archives and the Shakespeare Birthplace Trust.
- The 21-30 group comprised 10 local authorities (including 2 from Scotland), 1 university and The Mills Archive Trust.

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[21] Devon Heritage Services reported twice, one from the Senior Conservator, the other from the Community and Education Development Officer.

- The 11-20 group comprised the National Records of Scotland, 11 local authorities (including 4 from Wales, 1 from Scotland and London Metropolitan Archives), 2 universities, 1 business, and 9 specialist archives including 1 library (Glasgow Women's) 1 museum (Porthmadog, Wales).
- The 1-10 group comprised 14 specialist archives, 12 university archives, 11 local authority archives (including 4 from Scotland and 1 from Wales), 1 business archives and 5 national museums/libraries.[22]

According to these figures 66 (65%) of services responding have up to 20 volunteers annually, with 23 (23%) having between 21 and 50. 11 (inlcuding TNA) services (11%) host over 50 volunteers.
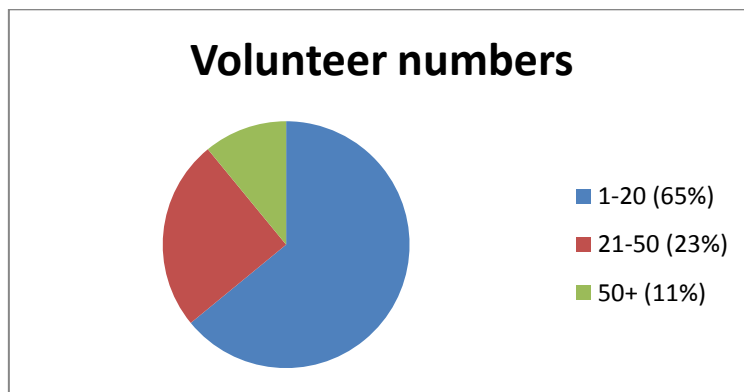


**Chart B. Volunteer numbers**

***What is the makeup of your volunteers in terms of (approximate) age? (Please provide numbers for all relevant age categories)(Q11) (93 responses)***

Table C below shows both the breakdown of responses and a numerical breakdown of ages from the 93 responses to this question. It suggests that the highest number of volunteers (625 and 592) is in the age brackets 55-64 and 65-74 respectively (or 49%). The next largest group (427 or 17%) is in the 18-24 age group, suggesting that this represents students and others seeking work experience.

While volunteers' ages remain at the older end of the spectrum, 59% volunteers over 55 is smaller than the comparable figure in 2009, which was 67%.[23]

This data might indicate that the total number of volunteers in the 93 services responding to this question as 2500. However this would need further substantiation.

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[22] National Library of Scotland reported twice, one from a Curator another from a Volunteer.
[23] Ray, p. 4.

| Age | Total Number | Responses |
|---|---|---|
| Under 18 | 74 | 43 |
| 18-24 | 427 | 72 |
| 25-34 | 202 | 52 |
| 35-44 | 104 | 46 |
| 45-54 | 226 | 48 |
| 55-64 | 625 | 65 |
| 65-74 | 592 | 72 |
| 75+ | 250 | 44 |
| Total | 2500 | |
| Respondents: 93 | | |

**Table C. Age of volunteers**
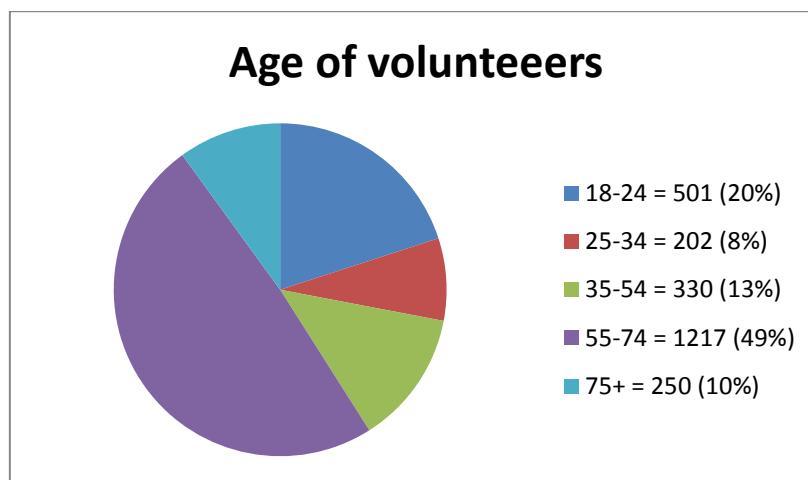


**Chart C. Age of Volunteers**

***What is the % make up of your volunteers in terms of gender? (Q10) (96 responses)***
- The gender breakdown from 96 responses was 38% male and 63% female

***What is the makeup of your volunteers in terms of ethnicity? (If you don't know exactly please approximate)(Q12) (96 responses)***
- In terms of ethnicity, 97% volunteers are white, with black and Asian at about 2.5% and other at.5%.

***What percentage of your volunteers have a disability? (If you don't know exactly please approximate) (Q13) (95 responses)***
- 46 services said they hosted volunteers with a disability. Percentages rather than actual numbers were supplied: between 2% and 33% were cited as having disabilities.

***Which of the following types of volunteer do you involve in your service? (Please supply annual numbers)(Q14) (93 responses)***

| Answer Choices | Total Number |
|---|---|
| School work experience | 115 |
| Undergraduates/graduates aiming to undertake postgraduate archive course | 206 |
| Undergraduates/graduates aiming to enter heritage professions | 172 |
| Work experience/internships not linked to heritage career ambitions | 84 |
| Post professional qualification work experience | 58 |
| FE/HE college interns/placements on an annual basis | 55 |
| Other | 986 |
| Total Respondents: 93 | |
| | 1676 |

**Table D. Types of volunteer placements**

Table D shows that most volunteering is not tied to specific types of placement.

The largest category of placement relates to the 986 volunteers (59%) in the 'other' category.

The remaining 690 (41%) are however managed via specific placements.

- 7% are school work experience students
- 12% are those aiming to access university archive/records management programmes
- 10% are those aiming to enter heritage professions

Fewer host placements that are not linked to heritage careers (5%); for those with post-qualification experience (4%) or from FE/HE colleges (3%).

This data might indicate that the total number of volunteers in the 93 services responding to this question as 1676.

*On average, how many hours do your volunteers work each week? Please give a total weekly figure for all your volunteers (not for individuals). If you don't know exactly, please approximate. (Q15) (93 responses).*

| Answer Choices | Total Number (Hours) | Responses |
|---|---|---|
| Under 10 | 400 | 34 |
| 11-50 | 911 | 39 |
| 51-75 | 479 | 10 |
| 76-100 | 477 | 8 |
| 101-150 | 759 | 8 |
| 151-200 | 160 | 3 |
| 201-250 | 452 | 4 |
| 251-300 | 0 | 2 |
| 301-350 | 331 | 3 |
| 351-400 | 0 | 2 |
| Over 400 hours | 450 | 3* |
| Total Respondents: 93 | 4419 | 116 |

**Table E.  Average weekly hours contributed**

The data provided in response to this question is slightly suspect. A few of the 93 respondents appear to have provided numbers of volunteers rather than of weekly hours worked, and one or two made more than one response. Where others entered a 0 into the answer choices and the system counted them as positive numbers in the system (e.g.* the system says 3 respondents logged over 400 hours when in fact one logged 400 hours and 2 entered 0 hours in this category).

However taken in broad terms a total weekly figure of 4419 hours of volunteer contribution might be assumed.

***Respondents were asked how long their volunteers had been with them for?(Q16)( 93 responses)***

In terms of longevity, as might be expected most volunteers had been with services for the shortest period of time.  Thus 91 (98%) of archives services had volunteers who had been with for them for less than 5 years; 48 (52%) had had some volunteers for between 5 and 10 years;  26 (28%) for 11-15 years and 19 (20%) for 16 years or longer.

| Answer Choices | Total volunteer numbers | Responses |
|---|---|---|
| **Under 5 years** | 1502 | 91 |
| **5-10 years** | 322 | 48 |
| **11-15 years** | 161 | 26 |
| **16 years or longer** | 61 | 19 |
| | 2046 | |

**Table F. Length of volunteer service**

Statistics show that the number of volunteers counted for this question totalled 2046.

***Do you have enough volunteers to allow you to do what you want to do? (Q17) (96 responses)***

- 58 (60%) services said that they did, while the remaining 38 (40%) said that they did not.

There were 55 comments which fall into 3 broad themes.

The majority, 34 of the 55 responses (or 62%) would have liked to increase the number of volunteers but did not either have the space, capacity or resources (mainly staff time to administer/ manage/ supervise) to do so.

12 (22%) would like to have more and imply that this is a manageable proposition. Some have projects in mind (e.g. a move, creating indexes)

6 (11%) highlight a problem around skills: it is not difficult to recruit volunteers, but those with specialist skills and knowledge are harder to come by (including IT skills) and it can be difficult to find suitable work.

### 4.      Managing volunteers (Q 18-33)

This section sought to discover the ways in which services managed volunteers. Questions focused on issues of policy and management, recruitment and training, evaluation and perception. Many were simple yes/no questions.

***Does your organisation have a specific person whose overall responsibility is the management and deployment of volunteers? (Q18) (96 responses)***

The purpose of this question was to gauge how the role of volunteers was perceived and managed within the organisation. It appears that 6 people responded twice (i.e.102 total)

- In 30 (31%) services there was a person with specific overall responsibility for volunteers. In 12 of these 'Volunteer' was included in the job title, the most common being 'Volunteer Co-ordinator'. [24] Others were more general such as HR Manager, Archive Education Officer, Archivist, so clearly had additional responsibilities too.
- 26 (27%) said a member of staff was specifically designated with managing and deploying volunteers as one part of their job, and their job titles were mainly 'archivist' but included conservators, curators and a community and education development officer.
- In 18 (19%) services there is no-one specifically designated with managing and deploying volunteers as part of their job but someone does this task anyway.
- In 27 (28%) the responsibility for volunteers is shared among the staff
- One respondent said that no-one was responsible for the volunteers in their service.

***Does your organisation/service have a volunteer policy? (Q19) (98 responses)***
- In response 87 (89%) services said they had and 11(11%) said that they had no volunteer policy.

Of those that did
- 44 (45%) had a policy based on their parent organisation's policy
- 36 (37%) had a service specific policy.

Only two services had made use of such recommended models as the Investing in Volunteers nine indicators and the Institute for Volunteering Research's Compact Code of Good Practice on Volunteering . These were TNA and The Royal Albert Hall Archive.

This statistic compares favourably with those reported in Ray's 2009 report where studies had shown figures of volunteer policy adoption by services as 33%, 55%, 68% and 75% in the years 2001, 2005, 2007 and 2008 respectively.[25]

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[24] Volunteer Co-ordinator in National Library of Wales, East Sussex RO, South West Film and Television Archive, Wolverhampton City Archives, Royal Botanic Gardens Kew, Glasgow Women's Library, Teesside Archives; Volunteer Officer in Northamptonshire Record Office and National Railway Museum; Volunteer and Engagement Officer in Pennine Horizons Digital Heritage; Volunteer Development Manager in Peterborough Archive Services; and Head of Volunteering at The Children's Society.

[25] Louise Ray, 'Volunteering in Archives', p.23.

*Are volunteer tasks included in your service's business plan, with objectives and targets?(Q20)(95 responses)*

- In responses 37 (39%) people said they were, while 58 (61%) said they were not.

*Has the work/hours/contribution of volunteers been quantified in financial terms? (Q21) (96 responses)*

- In responses 22 (23%) people said this was quantified while 74 (77%) said it was not.

A number of those saying yes gave specific figures. These were : £19,186; £187,500; £350,000; £50,000; £21,604; £140,000 over 2 years; £28, 438 Jan – June this year; £30,000 p.a.

One gave no figures but said they calculated it according to HLF figures and values; another provided actual rates: unskilled £50, skilled £150, professional £350 - per person per day; one said £4,600 per volunteer per year. Two report the hours undertaken without translating it into figures.

*Do you pay volunteers' expenses? (Q22) (96 responses)*

- 42 (44%) said they paid expenses and 54 (56%) said they did not.

*Do you provide your volunteers with training? (Q23) (95 responses)*

- 91 (96%) services said they provided training while 4 (4%) said they did not.

*Do volunteers receive a formal induction? (Q24)(98 responses)*

- 80 (82%) services provide induction while 18 (18%) said they did not.

*How does your service normally recruit volunteers? (Tick all that apply)(Q25)(96 responses)*

| Answer Choices | Number | % |
|---|---|---|
| **Volunteers approach us** | 84 | 88% |
| **Word of mouth** | 71 | 74% |
| **Links with educational establishments (e.g. student placements)** | 59 | 61% |
| **Friends or other groups** | 42 | 44% |
| **Advertisements in the organisation** | 37 | 39% |
| **Intermediary organisations (e.g. volunteer bureaux)** | 22 | 23% |
| **Advertisements in the press** | 16 | 17% |
| **Total Respondents: 96** | | |

**Table G. Methods of recruiting volunteers**

A far higher percentage of volunteers appear to approach services themselves than in the Ray 2009 Reports, where the figure is just 44%.[26]

From 24 further comments, 11 used websites (mainly of their parent organisation, one of ARA), 4 used JiscMail, and 4 advertised in the local and/or specialist press. One (University of Hull) has an

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[26] Ray, 2009, p. 56.

agreement with the department of history that all undergraduates have a work placement; West Sussex RO relies on published articles at attract people; and King's College Taunton relies on the school's Community Service Scheme.

***Does your service recruit volunteers as individuals (rather than in groups)? (Q26)(98 responses)***
- 95 (97%) of services recruit individuals and 3 (3%) do not.

***Does your service recruit volunteers in a group from existing organisations? (e.g. NADFAS, Women's Institute)(Q27)(97 responses)***
- 25 (26%) services recruit in groups while 72 (74%) do not.

Existing organisations identified in 20 additional comments were:
- NADFAS  - 10 responses (1 of these was SADFAS)
- WI
- Friends
- Local history society,
- Family history society
- Community groups
- Paper conservation students
- Railway societies
- Western Front Association
- Archive courses
- University students

***Does your service recruit volunteers in a group in order to undertake a specific project?***
***(Q28)(95 responses)***
- 44 (46%) responses said they did while 51 (54%) said they did not.

There were 37 additional comments outlining projects.  About half of these described cataloguing projects, sometimes naming the project; others described archive groups, series or types of material being worked on; conservation and preservation, cleaning and re-packaging projects;  scanning and digitisation projects; oral history. These are more specifically described in the Volunteer tasks, activities and projects (Q34-44) section below.

One commented

 *'But we would only ever recruit volunteers for a specific role. You cannot just be 'a volunteer''.*

***Does your organisation have succession planning for when volunteers leave?(Q29) (99 responses)***
- 23 (23%) said that they did and 76 (77%) that they did not.

***Do you think that it is becoming easier or more difficult to recruit volunteers for your service? ( Q30) (99 responses)***

**Recruiting volunteers now is…**

- Much easier 12%
- Easier 32%
- Harder 6%
- Much harder 0%
- Neither easier or harder 49%
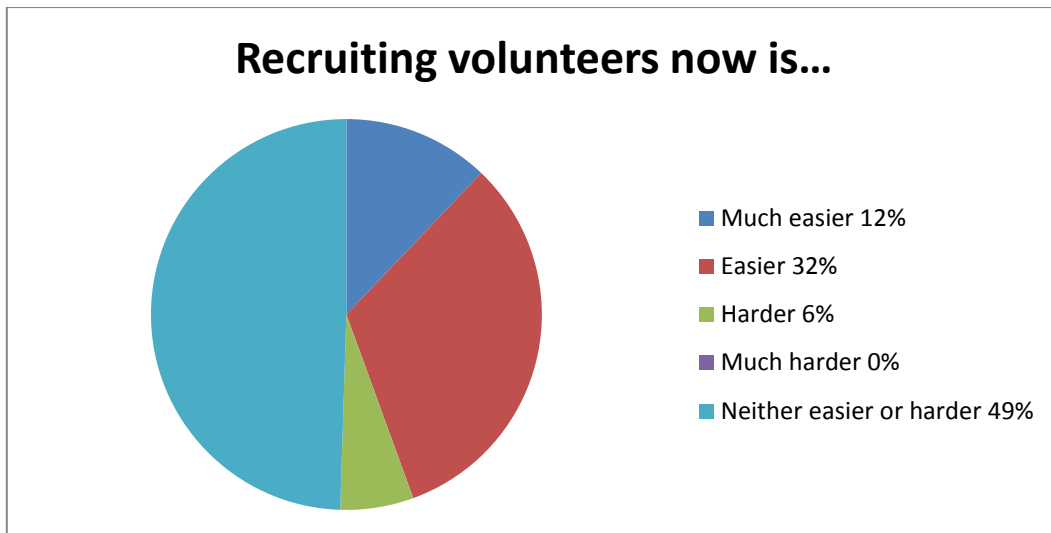
**Chart D. Ease of recruiting volunteers**

This question generated some interesting comment from 39 respondents.

A number noted the increased availability of volunteers and potential for volunteering given

- the encouragement volunteering is being given in all aspects of society
- the numbers of active people in retirement seeking meaningful roles to fulfil social and physical needs
- the increase in redundancy due to the recession and the availability of graduates needing experience and/or jobs.

It was also noted that

- retired people now have greater expectations from volunteering
- but that some may lack appropriate technical and IT skills
- not all volunteers who approach services can always be accommodated
- older people are now leaving as they cannot afford the travel costs
- it can be difficult to replace volunteers half way through a project
- although it was easier to find volunteers, as the recruitment process has become more formal it takes up a greater proportion of staff time, taking professional staff away from professional duties to undertake HR tasks

In terms of student volunteers

- that these had high expectation and don't just want to do the basics for which they are currently skilled
- the importance of volunteering for CV/job /university application purposes.

Several demonstrated how they were developing their volunteering 'offer' noting where

- a 'landmark building' had given the service greater visibility and attracted volunteer enquiries
- the wider organisation had good volunteer recruitment processes

- a more clearly defined 'offer', including a variety of project tasks, 'makes the volunteering options with us more attractive and interesting, and more transparent'.

Two further comments on recruitment:
*'As an organisation, we have become more receptive to volunteers over the last 5 years and the systems we have in place now make it easier to recruit. Our growing reputation for hosting volunteers has meant that numbers coming forward have grown. Word of mouth plays a significant part in our recruitment of volunteers...'*

And

*'Current debate about definition of volunteers/interns/paid posts has caused us to suspend recruiting volunteers while policies are reviewed.'*

***Do you formally evaluate/ quality check the work undertaken by volunteers?(Q31) (98 responses)***
- 71 (72%) said that they did and 27 (28%) that they did not.

This question generated 45 additional comments about quality checking processes.
- Processes varied from spot-checking to formal reviews with individual volunteers on a regular, sometimes annual, basis.
- Checking might be undertaken for example at the end of each day, or as volunteers progress through their work. One allocated approximately 1 hour line management for every 10 hours volunteering.
- Checking may be done by supervisors, archivists, training officers, collections managers, mentors, and by volunteers themselves, but is largely by staff members of some kind, often using guidelines.
- Cataloguing work is particularly carefully checked whether against standards and guidelines, prior to uploading on to CALM and may be proof read, edited and further checked.
- Oral history, image digitisation quality, repackaging were also highlighted as tasks needing careful checking.

One further comment:

*'Not in a formal way, but informally. It has become clear that formal checking does nothing but alienate volunteers, but picking up issues as they occur and offering friendly advice, and keeping constant watch seems to be the only way of ensuring consistency of work. Volunteers are wont to decide (despite guidelines given to them) that they know best, sometimes with potentially disastrous consequences.'*

*How do you reward/thank volunteers?(Q32)( 89  responses)*

## Rewards



Legend:
- ■ Thank you events 61
- ■ Other 40
- ■ Discounts 13
- ■ Certificates 12

**Chart E. How volunteers are rewarded**

Volunteers were rewarded in a number of ways as shown from the 89 responses.

More detail was supplied in 43 additional comments.  These ranged from 'we don't' to 'we gave him a job!'.  Other rewards included a number who provide

- free or discounted lunches, refreshments, parking, biscuits and 'bucket-loads of tea';
- invitations to events,  get-together events particularly at Christmas
- small gifts often book tokens or chocolate though one is 'contemplating mugs', another offers 'company merchandise'
- discounted or free organisational membership
- recognition schemes, messages of thanks from a director or mentions in newsletters
- signed certificates for school pupils, prize day awards

Some do not offer any particular reward either because the volunteers say they don't want one or because staff shows how they value their volunteers from the welcome and thanks that they give them, and generally showing appreciation for their work.

***What challenges do you associate with managing volunteers? (Q33)(98 responses)***

## Q33 What challenges do you associate with managing volunteers?

Answered: 98    Skipped: 2
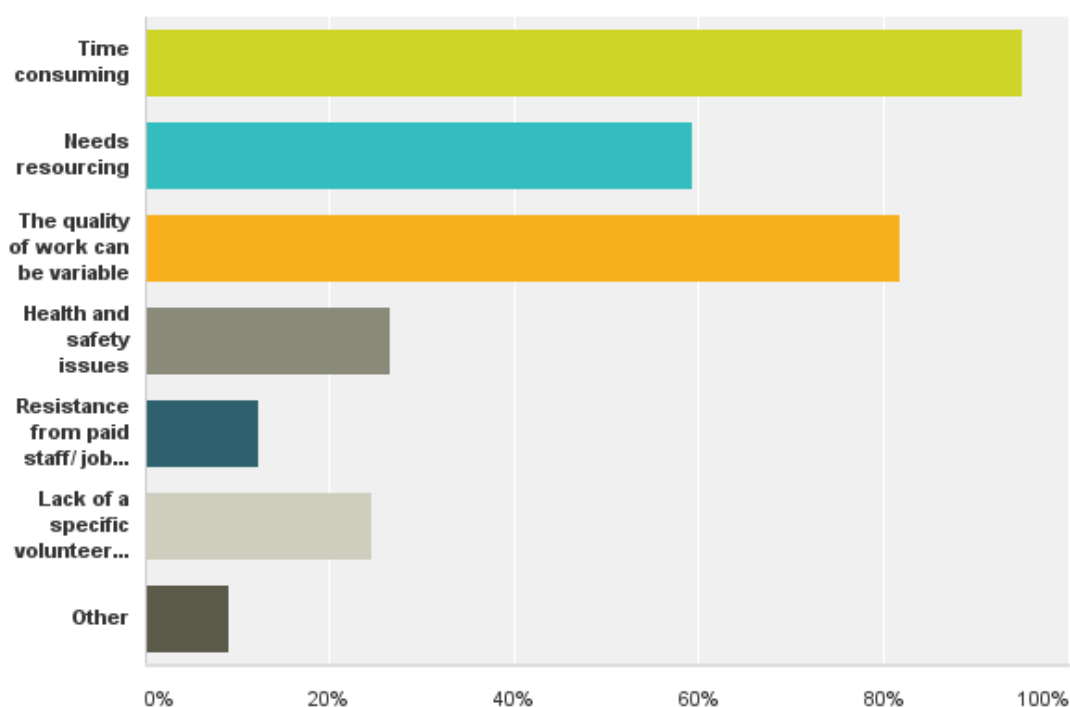


**Chart F. Challenges of managing volunteers**

This survey monkey screen shot shows that this question allowed a number of responses from each respondent.  While 95% and 82% of 98 respondents agreed that, respectively, managing volunteers could be time consuming, and the quality of work could be variable, clearly resistance from paid staff or job substitution issues (12%), lack of a specific volunteer manager (25%) and health and safety issues (27%) were less pervasive problems.  Just under 60% agreed that it needed appropriate resourcing.

There were 15 further comments that noted some further issues:
- difficulty logistically of overseeing  volunteers when staff numbers are small
- IT issues such as the cost of logons and computers and logistics around the time taken to liaise with ICT department to set up volunteer log-ins on PCs.
- lack of IT and technical skills in the older generation
- rules about leaving school pupils alone with staff
- expectations from volunteers
- lack of available space
- reliability of attendance, time-keeping
- volunteers' personal problems
- training
- identifying tasks that benefit them as much as we are benefiting from them

41

- although very valuable, they are no replacement for professional staff
- quantity of work can be variable, and things can be left half done when volunteers leave.

## 5.    Volunteer tasks, activities and projects (Q34-44)

This section sought to identify in some detail information about both the general and specific work and projects undertaken by volunteers.

*Do your volunteers undertake their activities physically on-site at your service?(Q34) (97 responses)*
- 64 (66%) said that they did and 1 (1%) said they did not. 35 (36%) said tasks were undertaken both on and off site.

This identifies quite a high number of joint site working. One person noted that onsite tasks included cataloguing from original sources, while off site ones involved cataloguing from digital images. Another said that volunteering work direct for the service was done on site while that for societies where the end results benefited the service was done off site, for example transcriptions of Parish Registers.

*If any of your volunteers work off site, do they work from home (for example inputting data online)?  (Q35) (68 responses)*
- 35 (51%) said they did and 33 (49%) said they did not.

*What general tasks are your volunteers involved in? (Please tick all that apply) (Q36) (69 responses)*

## Q36 What general tasks are your volunteers involved in? (Please tick all that apply)

Answered: 69   Skipped: 31
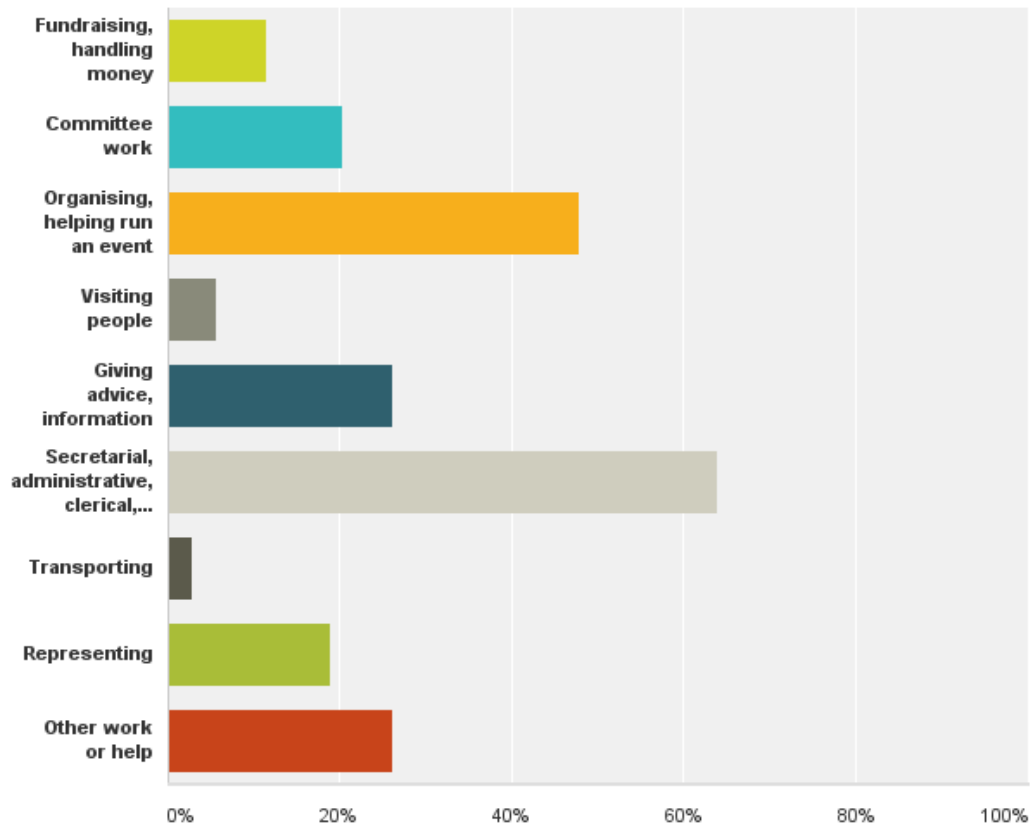


**Chart G. General volunteer tasks**

There was a 69% response rate to this question. The 25 comments that accompanied it indicate that, although the question was intended to relate to general (non-archival) roles, some specific tasks were described which would have been more appropriately placed under Q37, about specific roles and tasks.  So while one or two mentioned trustee work, stewarding and public enquiries 4 mentioned conservation tasks, 7 described cataloguing and indexing  and 5 oral history and transcription work.

*What specific (records/archival) tasks are your volunteers involved in? (Please tick all that apply)(Q37)(97 responses)*

| Tasks and roles | Responses | % |
|---|---|---|
| Describing records (transcribing, data inputting, indexing, cataloguing) | 91 | 93% |
| Conservation and preservation (cleaning, packaging, boxing, condition checking) | 82 | 85% |
| Sorting and arranging records | 72 | 74% |
| Scanning and digitising | 52 | 54% |
| Research and interpretation | 45 | 46% |
| Exhibitions/ displays | 35 | 36% |
| Profile raising and outreach | 22 | 23% |
| Giving advice on family history/archival/records issues | 21 | 22% |
| Public events (e.g. giving talks and lectures) | 18 | 19% |
| Oral history/reminiscence sessions | 13 | 13% |
| Other | 3 | 3.0% |
| Total Respondents: 97 | | |

**Table H. Specific volunteer tasks and roles**

There was an excellent response (97%) to this key question. The findings have been presented both as a bar chart and table for purposes of clarity.

There were surprisingly few comments accompanying this question, and those that were received would have been more appropriately offered in response to Q36. They included tagging using Discovery, the Catalogue; appraising / weeding materials, under supervision; shadowing the reading room and answering enquiries; orientation and visitor assistance in the library & archive centre; 'information point' volunteers

*If your service undertakes project based volunteering (you answered yes to Question 28) Name or briefly describe any project your volunteers are currently involved in. (Please supply title(s))(Q38) (47 responses)*
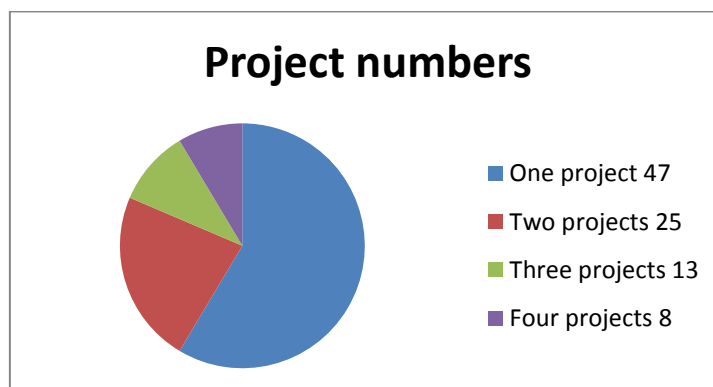


**Chart H. Numbers of volunteer projects**

93 specific projects were described by 47 services, some hosting between 2 and 4 projects each.

Respondents were invited to name their volunteering projects. The number of projects named or described totalled 93. Details of these projects are supplied in Appendix E.

Analysis of these projects shows that the term 'project' is fairly widely interpreted: some are time-limited while others are clearly long term and ongoing.  The projects fall into the following 6 categories:

1. Named and thematic projects (with archives drawn from more than one source) and probably time limited: 25 (27%)
2. Cataloguing specific archives group or fonds: 17 (18%)
3. Cataloguing archive series: 19 (21%)
4. Physical (relocation, conservation, preservation, digitisation): 23 (25%)
5. Indexing: 6 (6%)
6. Transcription: 3 (3%)

***Are any of the projects named above being undertaken in partnership with other groups/organisations? (Q39) (61 responses)***
- 20 (33%) said they were and 41(67%) said they were not.

Further comments came from 20 people who indicated:
National partners
- Ancestry
- National Maritime Museum
- Friends of The National Archives
- Federation of Family History Societies
- NADFAS
- Wellcome Trust
- Historical Model Railway Society
- Great Western Society
- LGBT Youth Scotland
- National Trust
- British Film Institute

Local partners
- Local secondary schools
- Local history and family history societies
- Specific bodies such as: Chichester Festival Theatre, Gloucester Rugby Club, Gloucester City Centre Community Partnership, Eastern Angles Theatre Company, Hackney Museum, the Jewish Military Museum, Swansea Libraries, Southwark Council, Albany Theatre, London School of Fashion, Greater Manchester Archives and Local Studies Partnership, Tees Valley (5 Tees Valley local authorities and community groups)and Museum of Wigan Life.

*Have you received any additional funding (internal or external) to support a volunteer project? (Q40)( 83 responses)*

- 31 (37%) said that they had and 52 (63%) that they had not.

From the 34 comments received the following funders were identified:

- HLF (in 22 cases)
- National Cataloguing Grants Scheme and Cymal  (2 cases each)
- one each supported by Welsh Water, the Wellcome Trust, the Robertson Trust, ALM London, Magnox, BFI regional development fund.
- in one case voluntary donations were provided following a public appeal for packaging materials.

*How far has your use of volunteers changed in the past 5 years?(Q41) (90 responses)*

| Answer Choices | Number | % |
|---|---|---|
| Number of volunteers has increased | 71 | 79% |
| Number of volunteers has decreased | 8 | 9% |
| Volunteers are involved in a wider range of activities | 48 | 53% |
| Volunteers are involved in a more restricted range of activities | 2 | 2% |
| Other changes or developments | 11 | 12% |
| Total Respondents: 90 | | |

Table I. Changing use of volunteers

These figures demonstrate that the direction of travel is towards an expansion both in terms of numbers and range of activities. Of the 18 further comments, 6 indicated that their volunteer programmes had only been running for between one and three years, so that it was too soon to indicate longitudinal changes.

*In what task or activity area have you seen the use of volunteers develop most significantly over the last five years (Q42)(76 responses).*

Responses included some general comment, such as from as those who had had been using volunteer support for less than 5 years.  Those (63) who provided specific areas of activity that had developed can be categorised as follows.

| Area of activity | Number | % |
|---|---|---|
| Cataloguing | 22 | 35% |
| Outreach activities, events support, public facing volunteers | 11 | 17% |
| Indexing | 8 | 13% |
| Conservation activities including preparation for scanning | 7 | 11% |
| Digitisation | 6 | 9% |
| Inputting data | 5 | 8% |
| Research (e.g. identification of photographs) | 3 | 5% |
| Use of remote volunteers | 1 | 2% |
| | 63 | |

**Table J. Developing areas of volunteer activity**

In this instance there does seem to have been an increase in involvement of volunteers in outward facing activities.

***Do you have any further comments?(Q43) ( 39 responses)***

Apart from the 6 respondents who replied 'no' to this question, comments from the remaining 33 can be roughly divided into:

1) Elucidations of their comments made to earlier questions in the survey (5) for example
- the difficulty of providing figures for Qs 8-17 given the fluid nature of volunteer numbers
- the requirement of the system for 'positive' numbers
- that acquiring details of off-site volunteers can be difficult and that these are not just necessarily working from home.

2) Comments on their own volunteering approach (17) for example
- they have not included non-archival volunteers (e.g. museum, archaeology)
- that they use volunteers for specific projects only
- that one is aiming to involve volunteers in more outreach activities
- another feels the need for strategic planning in relation to volunteers
- another notes how volunteers enable the freeing up of time for the sole archivist
- one comments on the value of the volunteering site [www.doit.org.uk](www.doit.org.uk) and their wish to provide NVQs for volunteers.

More negatively, one notes that adult volunteers will cease to be accommodated once a paid graduate trainee joins the service, and one from a specialist archive says

*'We don't take professionally qualified staff on as volunteers, only students already on course to support their education with experience. Many are completely at sea when placed in an archive environment and should not really be going into the profession. I think a lot of people do the training without thought or aptitude. Our other type of volunteer comes from the membership of our own organisation and we use life-skills such as research experience to assess how we can both get something from a potential volunteer experience. It has to be mutually beneficial or it's outreach/PR.'*

3) More general comments about volunteering (11)
Observations included:
- *Most benefit from volunteers is obtained when their research interests closely map to the needs of the service, and that offers from them often stem from this*
- *It is as important for the volunteers to benefit from the volunteering activity as much as the archive service*
- *Volunteers are useful and bring variety of experience. They are very important as they help support the Council's key objectives and the Director holds the service in high esteem as a result*

- *Long term volunteers have become a vital part of the service and are accepted generally in the school for the extra valuable contribution they give*
- *Time to set-up and support volunteers can easily be under-estimated but the numbers accepted are based upon the number we feel able to support rather than the numbers applying*
- *Volunteers get a lot done but managing/organising takes up most of one member of staff's time to do*
- *The linking of volunteer work to service planning and staff activities/projects as an important step to take, rather than just 'finding things for them to do'*
- *Most requests are now to volunteer one day a week, rather than full-time for a week/two weeks etc. This is usually because volunteers have other (paid) employment.*
- *Volunteers are very valued but there is no doubt they are being used as unpaid staff doing work which should be done by paid professionals; they also take up valuable time of those staff still in post.*

***Are you willing to discuss your volunteering project(s) and experience further?(Q44) ( 93 responses)***
- 79 said yes and 14 said no
- 65 respondents supplied contact details – see Appendix F.

**Analysis,  Conclusion and recommendations**

See main report.


Caroline Williams
caroline@cmwilliams.org.uk
January 2014

# Appendix B.   Volunteering survey: questions asked



VOLUNTEERING IN ARCHIVES SURVEY 2013

ARA SUB-COMMITTEE ON VOLUNTEERING

**Introduction to survey**

The Archives and Records Association is currently delivering an action plan to develop the role, value and impact of volunteering.  In pursuit of this the Public Services Quality Group Sub-Committee on Volunteering is undertaking a research project to build a comprehensive picture of the types of volunteering and how it is managed in archives, records management and conservation services.

This survey forms a key element of the evidence-gathering process. It is addressed to employers and managers who are involved in the recruitment and management of volunteers in their archives, records management and conservation services.  It seeks information about your organisation and service, the profile of the volunteers in your service, their management and the activities that they undertake.

The results of this survey will have an important impact on ARA's ongoing plans to support good volunteering practice among its members. A report of the findings of this survey will be published in autumn 2013. The survey comprises 44 questions in four sections, most of which require a simple tick in response.

Please answer as many of the questions as possible: all your contributions will be important in getting an accurate snapshot of volunteering in our sector.

The survey will remain open until 11 September 2013.

Many thanks
Caroline Williams
caroline@cmwilliams.org.uk

**Sections:**

- A.  Organisation and service
- B.  Volunteer profile
- C.  Managing volunteers

D.  Volunteer tasks, activities and projects

**A.  Organisation and Service**
1.  Name of person completing survey
2.  Position of person completing survey
3.  Email address of person completing survey
4.  Name of parent organisation
5.  Name of archives (or other) service
6.  Address of service
7.  Web site address

**B.  Volunteer profile**
8.  In what order of priority would you rate the relevance of the following reasons for involving volunteers
    - Increases diversity
    - Promotes user involvement
    - Gives our work added value
    - Gives people a route to employment
    - Allows us to do things we could not normally do
    - Saves money
    - Other
9.  How many volunteers does your **service** involve in total?
    - 1-10
    - 11-20
    - 21-30
    - 31-50
    - 51-70
    - 71-100
    - 100 + …..(please say how many)
10. What is the make up of your volunteers in terms of gender?
    - Male….%
    - Female….%
11. What is the makeup of your volunteers in terms of (approximate) age? (Please provide numbers for all relevant age categories)
    - Under 18
    - 18-24
    - 25-34
    - 35-44
    - 45-54
    - 55-64
    - 65-74
    - 75+

    - What is the makeup of your volunteers in terms of ethnicity? (If you don't know exactly please approximate)

- o White….%
- o Black and Asian….%
- o Other….%

12. What percentage of your volunteers have a disability? (If you don't know exactly please approximate)

….%

13. Which of the following types of volunteer do you involve in your service? (Please supply numbers)
    - o School work experience
    - o Work experience/internships not linked to heritage career ambitions
    - o Post professional qualification work experience
    - o Undergraduates/graduates aiming to enter heritage professions
    - o Undergraduates/graduates aiming to undertake postgraduate archive course
    - o Interns/placements from FE/HE colleges on an annual basis
    - o Other

14. On average, how many hours do your volunteers work each week? Please give a total **weekly** figure for **all your volunteers** (not for individuals). If you don't know exactly, please approximate……

15. How many of your volunteers have been with you for
    - o Under 5 years
    - o 5-10 years
    - o 11-15 years
    - o 16 years or longer

16. Do you have enough volunteers to allow you to do what you want to do?
    - o Yes
    - o No


**C. Managing volunteers**

17. Does your organisation have a specific person whose overall responsibility is the management and deployment of volunteers?
    - ▪ Yes……What is their job title?
    - ▪ No…… Which of the following?
    - o Someone who is specifically designated with managing and deploying volunteers as *one part of* their job (please supply job title)
    - o Someone who is not specifically designated with managing and deploying volunteers as part of their job but does this task anyway (please supply job title)
    - o No. The responsibility is shared among staff
    - o No-one is responsible for managing and deploying volunteers in our service


18. Does your organisation/service have a policy on the involvement of volunteers?
    - o Yes - based on our parent organisation's policy
    - o Yes – we have a service specific policy
    - o Yes - based on Institute for Volunteering Research's (IVR) Investing in Volunteers indicators (http://iiv.investinginvolunteers.org.uk/about/the-nine-indicators)

- o Yes - based on the IVR's Compact Code of Good Practice on Volunteering (http://www.ivr.org.uk/component/ivr/the-compact-code-of-good-practice)
- o Yes – other
- o No

19. Are volunteer tasks included in your service's business plan, with objectives and targets?
    - o Yes
    - o No

20. Has the work/hours/contribution of volunteers been quantified in financial terms?
    - o Yes
    - o No
    - o If so please say how much

21. Do you pay volunteers' expenses?
    - o Yes
    - o No

22. Do you provide your volunteers with training?
    - o Yes
    - o No

23. Do volunteers receive a formal induction?
    - o Yes
    - o No

24. How does your service normally recruit volunteers? (Tick all that apply)
    - o Word of mouth
    - o Advertisements in the organisation
    - o Advertisements in the press
    - o Links with educational establishments (e.g. student placements)
    - o Intermediary organisations (e.g. volunteer bureaux)
    - o Volunteers approach us
    - o Friends or other groups
    - o Other (please specify)

25. Does your service recruit volunteers as individuals (rather than in groups)?
    - o Yes
    - o No

26. Does your service recruit volunteers in a group from existing organisations? (e.g. NADFAS, Women's Institute)
    - o Yes …….(please name the organisation)
    - o No

27. Does your service recruit volunteers in a group in order to undertake a specific project?
    - o Yes……(please name any relevant project)
    - o No

28. Does your organisation have succession planning for when volunteers leave?
    - o Yes
    - o No

29. Do you think that it is becoming easier or more difficult to recruit volunteers for your service?
    - o Much easier

- o Easier
- o Neither easier nor harder
- o Harder
- o Much harder

Can you say why?.......

30. Do you formally evaluate/ quality check the work undertaken by volunteers?
    - o Yes…..(please say how)
    - o No

31. How do you reward/thank volunteers?
    - o Certificates
    - o Discounts on events/publications
    - o 'Thank you' events
    - o Other

32. What challenges do you associate with managing volunteers?
    - o Time consuming
    - o Needs resourcing
    - o The quality of work can be variable
    - o Health and safety issues
    - o Resistance from paid staff/ job substitution issues
    - o Lack of a specific volunteer manager
    - o Other

**D. Volunteer tasks, activities and projects**

33. Do your volunteers undertake their activities physically on-site at your service?
    - o Yes
    - o No
    - o Both on and off-site
    - o Other

34. If any of your volunteers work off site, do they work from home (for example inputting data online)?
    - o Yes
    - o No….(please state their place of work)

35. What general tasks are your volunteers involved in? (Please tick all that apply)
    - o Fundraising, handling money
    - o Committee work
    - o Organising, helping run an event
    - o Visiting people
    - o Giving advice, information
    - o Secretarial, administrative, clerical, technical
    - o Transporting
    - o Representing
    - o Other work or help

36. What specific (archival) tasks are your volunteers involved in? (Please tick all that apply)
    - o Sorting and arranging records
    - o Describing records (transcribing, data inputting, indexing, cataloguing)

- o  Scanning and digitising
- o  Conservation and preservation (cleaning, packaging, boxing, condition checking)
- o  Research and interpretation
- o  Exhibitions/ displays
- o  Profile raising and outreach
- o  Public events (e.g. giving talks and lectures)
- o  Giving advice on archival/records issues
- o  Oral history/reminiscence sessions
- o  Other (please specify)

37. If your services undertakes project based volunteering ( you answered yes to Question 23)
Name any project your volunteers are currently (?) involved in? (Please supply title(s))
- o  1.
- o  2.
- o  3.
- o  4.
- o  5. N/a

38. Are any of the projects named above being undertaken in partnership with other groups/organisations?
- o  Yes…..(please name group/organisation below)

1.

2.

3.

4.

- o  No…..

39. Have your received any additional funding (internal or external) to support a volunteer project?
- o  Yes…..(please name source of funding)
- o  No

40. Referring to your responses to Questions 31-33 how far has your use of volunteers changed in the past 5 years?
- o  Number of volunteers has increased
- o  Number of volunteers has decreased
- o  Volunteers are involved in a wider range of activities
- o  Volunteers are involved in a more restricted range of activities
- o  Other changes or developments

41. In what task or activity area have you seen the use of volunteers develop most significantly over the last five years?

42. Do you have any further comments?

43. ARA is seeking to develop an in depth profile of volunteering in the sector. Are you willing to discuss your volunteering project(s) and experience further?
- o  Yes….(contact details)
- o  No….

Thank you for completing this survey
Caroline Williams  caroline@cmwilliams.org.uk 13 August  2013

## Appendix C. Organisations, services and volunteer numbers of those whose data was included in the findings and analysis.

| Organisation | Service | Volunteer numbers |
|---|---|---|
| 1. Argyll & Bute Council | Argyll & Bute Council Archives | 0-10 |
| 2. Bedford Borough Council | Bedfordshire & Luton Archives & Records Service | 11-20 |
| 3. Bootham School | Bootham School Archives | 0-10 |
| 4. Brasenose College, Oxford | Brasenose College Archives | 0-10 |
| 5. Brunel University | Special Collections, Brunel University | 0-10 |
| 6. Cambridgeshire County Council | Cambridgeshire Archives and Local Studies | 31-50 |
| 7. Canterbury Cathedral Dean and Chapter | Canterbury Cathedral Archives | 31-50 |
| 8. Ceredigion County Council | Ceredigion Archives | 0-10 |
| 9. Cheshire West and Chester Council | Cheshire Archives and Local Studies | 51-70 |
| 10. Churchill College | Churchill Archives Centre | 0-10 |
| 11. College of St George, Windsor Castle | St George's Chapel Archives and Chapter Library | 11-20 |
| 12. Conwy County Borough Council | Conwy Archive Service | 0-10 |
| 13. Cornwall Council | Archives and Cornish Studies Service | 21-30 |
| 14. Cumbria Archive Service | Cumbria Archive and Local Studies Centre, Whitehaven | 21-30 |
| 15. Denbighshire County Council | Denbighshire Archives | 11-20 |
| 16. Devon County Council | Devon Heritage Services (Community and Education) | 31-50 |
| 17. Devon County Council | Devon Heritage Services (Conservation) | 31-50 |
| 18. Dorset County Council | Dorset History Centre | 31-50 |
| 19. Dumfries and Galloway Council | Dumfries and Galloway Libraries, Information and Archives | 21-30 |
| 20. Dundee City Council | Dundee City Archives | 21-30 |
| 21. Durham University | Special Collections | 11-20 |
| 22. East Sussex County Council | East Sussex Record Office | 31-50 |
| 23. Edinburgh City Council | Edinburgh City Archives | 0-10 |
| 24. Flintshire County Council | Flintshire Record Office | 11-20 |
| 25. Glasgow Women's Library | | 11-20 |
| 26. Gloucestershire County Council | Gloucestershire Archives | 100+ |
| 27. Hampshire County Council | Hampshire Archives and Local Studies | 21-30 |
| 28. Hereford Cathedral | Hereford Cathedral Library and Archives | 0-10 |
| 29. Herefordshire Council | Herefordshire Archive Service | 21-30 |
| 30. Heriot-Watt University | University Archives | 0-10 |
| 31. Highlife Highland | Highland Archive Centre | 11-20 |
| 32. Hull City Council | Hull History Centre | 71-100 |
| 33. Hull University | Hull University Archives, Hull History Centre | 11-20 |

| 34. Institute of Engineering and Technology | IET Archives | 0-10 |
|---|---|---|
| 35. Isle of Anglesey County Council | Anglesey Archives | 11-20 |
| 36. Isle of Wight Council | Isle of Wight County Record Office | 0-10 |
| 37. Kent County Council | Kent County Council; Libraries, Registration and Archives | 0-10 |
| 38. King's College, Cambridge | Archives Centre, King's College, Cambridge | 0-10 |
| 39. King's College, Taunton | King's College Archive and Historical Collections | 0-10 |
| 40. Kingston County Council | Kingston Heritage Service | |
| 41. Lancashire County Council | Lancashire Archives | 71-100 |
| 42. Liverpool John Moores University | LJMU Special Collections & Archives | 0-10 |
| 43. London Borough of Bexley | Bexley Local Studies & Archives | 0-10 |
| 44. London Borough of Hackney | Hackney Archives | 0-10 |
| 45. London Borough of Hillingdon | Hillingdon Local Studies, Archives and Museum Service | 11-20 |
| 46. Manchester Metropolitan University | Manchester Metropolitan University Special Collections | 0-10 |
| 47. Middlesbrough Counci (on behalf or the 4 Teesside boroughs) | Teesside Archives | 31-50 |
| 48. Museum of Science and Industry | | 0-10 |
| 49. National Library of Scotland | National Library of Scotland (Volunteer) | 0-10 |
| 50. National Library of Scotland | Manuscript and Archives Collections | 0-10 |
| 51. National Library of Wales | National Library of Wales (Volunteer co-ordination) | 51-70 |
| 52. National Library of Wales | The National Library of Wales (Conservation) | 0-10 |
| 53. National Railway Museum | Search engine: the National Railway Museum Archive & Library | 31-50 |
| 54. National Trust | Quarry Bank | 31-50 |
| 55. National Trust/Waddesdon Manor/Rothschild Foundation/ | The Waddesdon Archive at Windmill Hill | 0-10 |
| 56. Newcastle City Council | Tyne and Wear Archives | 0-10 |
| 57. North Lanarkshire CultureNL Ltd | North Lanarkshire Archives | 0-10 |
| 58. North of England Institute of Mining and MEchanical Engineers | North of England Institute of Mining and MEchanical Engineers | 71-100 |
| 59. Northamptonshire County Council | Northamptonshire Record Office | 21-30 |
| 60. Nottinghamshire County Council | Nottinghamshire Archives | 51-70 |
| 61. Orkney Islands Council | Orkney Library & Archive | 0-10 |
| 62. Oxford Health NHS Foundation Trust | Oxfordshire Health Archives | 0-10 |
| 63. Pennine Heritage | Pennine Horizons Digital Archive | 11-20 |
| 64. Porthmadog Maritime Museum | | 11-20 |
| 65. Rambert | Rambert Archive | 11-20 |
| 66. Royal Albert Hall | Royal Albert Hall Archive | 0-10 |
| 67. Royal Botanic Gardens Kew | Library, Art & Archives | 0-10 |
| 68. Royal College of Nursing | Royal College of Nursing Archives | 0-10 |

| 69. Royal College of Obstetricians and Gynaecologists | RCOG and Royal College of Midwives Archives | 0-10 |
|---|---|---|
| 70. Royal Voluntary Service | Royal Voluntary Service Archive & Heritage Collection | 11-20 |
| 71. Science Museum | Science Museum Library and Archives | 0-10 |
| 72. Scottish Government | National Records of Scotland | 11-20 |
| 73. Shakespeare Birthplace Trust | Shakespeare Library and Archive Collections | 31-50 |
| 74. Sheffield City Council | Sheffield Archives and Local Studies Library | 11-20 |
| 75. Society of the Sacred Heart | Provincial Archives, SSH | 0-10 |
| 76. Surrey County Council | Surrey Heritage at Surrey History Centre | 51-70 |
| 77. Swansea City and County | West Glamorgan Archive Srvice | 11-20 |
| 78. Tameside MBC | Tameside Local Studies and Archives | 11-20 |
| 79. The Bowes Museum | The Bowes Museum Reference Library and Archives | 31-50 |
| 80. The Children's Society | The Children's Society Records and Archives Centre | 11-20 |
| 81. The History of Advertising Trust | The History of Advertising Trust Archive | 11-20 |
| 82. The Mills Archive Trust | The Mills Archive | 21-30 |
| 83. The National Archives | The National Archives | 220 |
| 84. The Royal Bank of Scotland Group | The Royal Bank of Scotland Group Archives | 11-20 |
| 85. The Royal College of Surgeons of England | Archives | 0-10 |
| 86. The South West Film and Television Archive | The South West Film and Television Archive | 0-10 |
| 87. Trinity Laban Conservatoire of Music and Dance | Laban Library and Archive | 11-20 |
| 88. Unilever plc | Unilever Archives & Records Management | 0-10 |
| 89. University College London | Queen Square Library, Archive and Museum | 0-10 |
| 90. University of Dundee | University Archive Services | 0-10 |
| 91. University of Edinburgh | Centre for Research Collections (including Lothian Health Services Archive) | 51-70 |
| 92. University of Huddersfield | University of Huddersfield Archives & Special Collections | 0-10 |
| 93. University of Warwick | Modern Records Centre | 0-10 |
| 94. Vivacity Culture and Leisure Trust | Peterborough Archives Service | 21-30 |
| 95. West Sussex County Council | West Sussex Record Office | 51-70 |
| 96. Westminster School | Westminster School Archive | 0-10 |
| 97. Wigan Leisure & Culture Trust (on behalf of Wigan Council) | Wigan Archives & Local Studies | 21-30 |
| 98. Wolfson College, University of Oxford | Wolfson College Archives | 0-10 |
| 99. Wolverhampton City Council | Wolverhampton City Archives | 21-30 |
| 100. Worcestershire County Council | Worcestershire Archives | 31-50 |

## Appendix D.  Organisations who responded but whose data was not saved into the system

1.  Aberdeen City and Aberdeenshire Archives
2.  Bath Record Office
3.  Ceredigion Archives
4.  Cheltenham College Archives
5.  Flintshire Record Office (duplicate)
6.  Hertfordshire County Council
7.  Hillingdon Local Studies, Archives and Museum Service
8.  Isle of Man National Archives
9.  King's College University of London
10. Lancashire Archives (duplicate)
11. London Metropolitan Archives
12. National Archives of Ireland
13. National Library of Ireland
14. National Library of Wales (duplicate)
15. National Library of Scotland (duplicate)
16. Natural History Musuem Library and Archives
17. RCAHMW
18. Royal Botanic Gardens Kew (duplicate)
19. St Antony's College Oxford Middle East Centre Archive
20. Solihull Heritage and Local Studies Service
21. Tate Archives
22. The National Archives (Collection Care)
23. University of Bradford Special Collections
24. University of London
25. University of the Arts Archives and Special Collections Centre
26. University of St Mark and St John University Archive
27. Worcestershire
28. Yorkshire Archaeological Society

# Appendix E. Details of volunteering projects supplied in answer to Q 38.

1. **Names and Thematic (drawn from more than one source)**

    1. North East Coast Town Revealed: Hull's Second World War Records – Hull History Centre
    2. Welsh Water records cataloguing project – Conwy Archive Service
    3. Hackney Remembers WW1 project – Hackney Archives
    4. Gloucester Rugby Football Club heritage project – Gloucestershire Archives
    5. Swansea through the decades – West Glamorgan Archives Service
    6. Unexplored Riches in Medical History project – Children's Society
    7. First World War commemoration – Wolverhampton City Archives
    8. Greater Manchester First World War project – Tameside Local Studies and Archives
    9. Herefordshire and the Great War - HLF funded local history outreach project - Herefordshire Archive Service
    10. Jacobite risings: SP 35, SP 36 - TNA
    11. Forty Years On project – Peterborough Archives Service
    12. 21 Revolutions – Glasgow Women's Library
    13. Chichester Festival Theatre – West Sussex RO
    14. Paved with Living Colour - HLF funded local history outreach project - Herefordshire Archive Service
    15. Hampshire Showpeople project – Hampshire RO
    16. Mission to Seafarers – Hull University
    17. Fielding & Platt community heritage project (listing & interpreting archives, collecting & editing oral reminiscence - Gloucestershire Archives
    18. Hens Tae Watch Oot Fur - Glasgow Women's Library
    19. HLF learning project ('Vintage Rambert') - Rambert Archive
    20. Picture Sheffield (image digitisation) - Sheffield Archives and Local Studies Library
    21. Speaking Up for Disability (transcribing OHs) – West Sussex RO
    22. Charter Court (sheltered housing accommodation) community heritage project - Gloucestershire Archives
    23. Gloucestershire County History Trust (VCH), catalogue enhancement, resource transcription & fundraising - Gloucestershire Archives
    24. Joining Up Our Heritage (finished HLF project but cataloguing digital records that came in as a result) – West  Sussex RO
    25. First World War Project - digitisation, cataloguing, indexing of WWI connected records - Wigan Archives and Local Studies

2. **Cataloguing  archives group or fonds**

    1. Philip Larkin letters – Hull University
    2. Cataloguing an artist's papers – Manchester Metropolitan University (MMU)
    3. The Fen Office Revisited - project to re-catalogue the records of the Bedford Level Corporation - Cambridgeshire Archives and Local Studies
    4. Wigan Licensing Records Project – cataloguing - Wigan Archives and Local Studies
    5. Fully cataloguing an important collection of Merchant Company records – Edinburgh City Archives
    6. Box listing the Peter Brinson Collection by a group of over 60s – Laban Library and Archive
    7. Cataloguing a textile archive - MMU
    8. Sorting and listing diocesan records – Nottinghamshire Archives
    9. Cambridge City Cataloguing Project – Cambridgeshire Archives and Local Studies

10. Crichton Royal Hospital project (Wellcome Trust funded) - Dumfries and Galloway Libraries, Information and Archives
11. Costume cataloguing project - Rambert Archive
12. Currently recruiting for WWI researchers as part of a Tees Valley project – Teesside Archives
13. Identification of material for World War 1-related projects/activities – Cheshire Archives and Local Studies
14. Cataloguing National Trust botanical collection – Dorset History Centre
15. Major archive cataloguing project – National Trust Quarry Bank
16. The Cataloguing and Digitisation Project  - South West Film and TV Archive
17. Wills project – East Sussex Record Office

**3.     Cataloguing archive series**

1. Swindon Works Listing project - listing the engineering drawings from Swindon Works – National Railway Museum
2. First World War officers' service records - WO 339 - TNA
3. Proposed project: sorting and cataloguing sale catalogues (for library) - Bowes Museum
4. Medieval and Early Modern property deeds - WARD 2 - TNA
5. Listing newscuttings for Rampton Hospital – Nottinghamshire Archives
6. Petty Sessions case files cataloguing project – Conwy Archive Service
7. Quarter Sessions (Indexing and Conservation ) – West Sussex RO
8. QSB rolls - detailed listing Quarter Sessions recognizance rolls – Lancashire Archives
9. Sorting and detailed cataloguing of the C18-19 Chapel invoices - Archives Centre, King's College, Cambridge
10. Glass Plate Negative Listing Project - Science Museum
11. Boards of Guardians minute books – Archives and Cornish Studies Service
12. Cataloguing the Lever Brothers photograph albums at item level – Unilever Archives and Records Management
13. Trade Literature Listing Project - Science Museum
14. Proposed project: cataloguing gift of art reference books (for library) – Bowes Museum
15. Faculties cataloguing – Durham University
16. Design registers BT 43 - TNA
17. Architectural plans and building petitions for Leith: cleaning, packaging and electronically indexing – Edinburgh City Council
18. Data Inputting for CALM – Flintshire RO
19. Updating various databases - Kingston Heritage Service

**4.     Transcription**

1. Edward Hall Diary Collection Transcriptions - nationally important diary collection, transcribing for publication - Wigan Archives and Local Studies
2. Summarising and/or transcribing archive oral histories – NT Quarry Bank
3. Poll books transcribing – Durham university

**5.     Indexing**

1. City Guilds indexing – Durham university
2. Creating electronic index for Dean of Guild Court registers – Edinburgh City Council
3. Chester will index - compiling index of Chester wills – Lancashire Archives
4. Surrey Records Online Indexing Project – Surrey History Centre

5. Indexing Quarter Sessions Calendars of Prisoners, Sheffield, 1880 – 1910 - Sheffield Archives and Local Studies Library
6. Indexing the Solutiones papers - part of the C18-19 accounts records - Archives Centre, King's College, Cambridge

**6. Physical (move, conservation, digitisation)**

1. Herbert Read Church Architecture Collection: Cleaning, repackaging and surveying – Devon Heritage Services
2. QE File Preservation Project - repackaging early 20th century administration files – Kew Botanic Gardens Archive
3. Bodley Bros. Iron foundry Exeter: Cleaning and packaging plans & drawings - Devon Heritage Services
4. Pacey Collection Glass Plate Negatives: Cleaning and packaging - Devon Heritage Services
5. Conservation project - Boards of Guardians repackaging – Flintshire RO
6. Quarter Session Project: Cleaning and repackaging - Devon Heritage Services
7. Researching and leading walking tours of estate – NT Quarry Bank
8. Repackaging, sorting and cataloguing a collection of photographs - Kingston Heritage Service
9. Carry On Cleaning - mass cleaning of quarter session records – Wigan Archives and Local Studies
10. ESRO Move project - ESRO
11. Archive re-location project - Rambert Archive
12. Preparation of collection for move to new premises (cleaning and packing archives) - Herefordshire Archive Service
13. Volunteers cleaning items from collection, but not really a group yet National Cataloguing Grants Scheme funded project – Hants RO
14. RBS Archive Taster Weeks – RBS Group Archives
15. Sorting, numbering and packaging quarter sessions rolls ready for cataloguing -. Bedfordshire & Luton Archives & Records Service
16. Creating an electronic inventory and location finding aid for archival collections in large repository – Edinburgh City Council
17. Digitising a collection of negatives – Kingston Heritage Service
18. VHS digitisation project – Rambert Archive
19. Refurbishment – Porthmadog Maritime Museum
20. Digitising photos – UCL Queen Square Library, Archive and Museum
21. MS Listing and Repackaging Project – Science Museum
22. Helping with a future exhibition  - MMU
23. Helping with a web-based project - MMU

**Project statistics**

| | | |
|---|---|---|
| Named and thematic | 25 | (27%) |
| Physical (move, conservation, digitisation) | 23 | (25%) |
| Cataloguing archive series | 19 | (21%) |
| Cataloguing  archives group or fonds | 17 | (18%) |
| Transcription | 3 | (3%) |
| Indexing | 6 | (6%) |
| Total | 93 | |

# Appendix F. Respondents willing to be contacted in future

| | | |
|---|---|---|
| 1. | judith.phillips@thebowesmuseum.org.uk | |
| 2. | sally.jenkinson@surreycc.gov.uk | |
| 3. | rkershaw@nationalarchives.gov.uk | 01970 632991 |
| 4. | rgriffith@herefordshire.gov.uk | |
| 5. | elizabeth.trout@millsarchive.com or phone | 0118 9502052 |
| 6. | Simon Wilson, s.wilson@hull.ac.uk | |
| 7. | Jackie.davidson@Canterbury-cathedral.org | 01227 865330 |
| 8. | jane.speller@nationaltrust.org.uk | |
| 9. | laura.mitchell@nas.gov.uk | |
| 10. | sue.millard@westsussex.gov.uk | |
| 11. | j.parrett@mmu.ac.uk | |
| 12. | Christopher.whittick@eastsussex.gov.uk | |
| 13. | francis.gotto@durham.ac.uk | |
| 14. | sophie.bridges@chu.cam.ac.uk | |
| 15. | simon.mckeon@bexley.gov.uk | |
| 16. | serena.fredrick@ed.ac.uk | |
| 17. | paul.evans@gloucestershire.gov.uk | |
| 18. | David Tilsley, Lancashire Archives | 01772 533034 |
| 19. | jane.jamieson1@virgin.net | |
| 20. | groberts@worcestershire.gov.uk | |
| 21. | whitehaven.archives@cumbria.gov.uk | |
| 22. | carol.tanner@hullcc.gov.uk | 01482317504 |
| 23. | patricia@layzellward.com Porthmadog Maritime Museum (Volunteer) | |
| 24. | steven.davies@flintshire.gov.uk | |
| 25. | richard.hunt@vivacity-peterborough.com | |
| 26. | janine.stanford@childrenssociety.org.uk | |
| 27. | janine.stanford@childrenssociety.org.uk | 020 7232 2966 |
| 28. | tmallett@cornwall.gov.uk | 01872 323125 |
| 29. | o.geddes@nls.uk | |
| 30. | colin.waller@highlifehighland.com | |
| 31. | phutchins@rcog.org.uk | |
| 32. | Jeannette.Strickland@unilever.com / | 020 7822 6642 |
| 33. | tim.procter@nrm.org.uk | 01904 686206 |
| 34. | elizabeth.green@hackney.gov.uk | |
| 35. | Heidi.mcintosh@wolverhampton.gov.uk | |
| 36. | clare.rider@stgeorges-windsor.org | |
| 37. | Laura.Yeoman@rbs.co.uk | |
| 38. | Michele.losse@rbk.kingston.gov.uk | |
| 39. | apmason@kings-taunton.co.uk | |
| 40. | sarah.lawson@ucl.ac.uk | |
| 41. | fiona.bourne@rcn.org.uk | |
| 42. | alocker@theiet.org | |
| 43. | ajsed@anglesey.gov.uk | 01248 751932 |
| 44. | l.cahill@kew.org | |

| | | |
|---|---|---|
| 45. | laura.stevens@womenslibrary.org.uk | |
| 46. | rosemary.davies@swansea.gov.uk | 01792 636589 |
| 47. | librarian@mininginstitute.org.uk | |
| 48. | s.wickham@hud.ac.uk | |
| 49. | Melissa.McGreechan@cambridgeshire.gov.uk | 01223 699642 |
| 50. | chloe@hatads.org.uk | |
| 51. | jane.brunning@denbighshire.gov.uk. | |
| 52. | matthew.mcmurray@royalvoluntaryservice.org.uk | 01380 730211 |
| 53. | m.p.forrest@dorsetcc.gov.uk | |
| 54. | j.fowler@trinitylaban.ac.uk | |
| 55. | Ruth Hobbins, Middlesborough Council | 01642 727732 |
| 56. | catherine.m.taylor@nationaltrust.org.uk | 01926 653414 |
| 57. | pdavidson@hillingdon.gov.uk | |
| 58. | deborah.phillips@devon.gov.uk | |
| 59. | graham.roberts@dumgal.gov.uk | |
| 60. | paul.newman@cheshiresharedservices.gov.uk | |
| 61. | archives@sheffield.gov.uk | |
| 62. | pamela.birch@bedford.gov.uk | |
| 63. | katie.flanagan@brunel.ac.uk | |
| 64. | archivist@kings.cam.ac.uk | |
| 65. | lizh@royalalberthall.com | |
| | | |

# Appendix G.  The changing face of volunteering: two case studies

## Case Study One: Cumbria Archive Service

**1.        Organisation**

Cumbria County Council: Cumbria Archive Service

**2.        Summary of activity**

1. The aim of the key project, started in 2007, was to help the Archive Service in Carlisle relocate from the Castle to its current location Lady Gillford`s House in 2010. Applications were sought via local newspapers, local radio, the Friends of Cumbria Archives and by word of mouth.  This resulted in applications from 35 volunteers, all of whom were taken on to the project. They helped staff to package and prepare the entire archive collection ready for the move.

2. Subsequent projects, informed by the methodology used in the first one, have been developed or updated across all four of Cumbria's archive centres. The new processes for acquiring and managing volunteers used at Carlisle, described below, were adopted across the county. The projects had a number of aims:

- At Kendal a special project to make available the papers of Alfred Wainwright the fell walker, guidebook author and illustrator is being supported by volunteers.
- At Whitehaven volunteers are indexing newspapers ready for WW1 commemorations
- At Barrow volunteers are indexing photographs and mining records.
- At Carlisle volunteers continue to work on preservation, packaging, cataloguing and indexing of transferred archives. They are also involved in caring for the older part of the Lady Gillford's House, and offering tours of it. They are being recruited to undertake original research into such areas as WW1 and for exhibitions.

35 volunteers took part in the relocation project in Carlisle. There are currently about 80 volunteers participating in total in all projects across Cumbria Archive Service's four locations.

**3.        Was this a project or part of ongoing business?**

This is a part of ongoing business.

**4.        Which theme does this align to in the policy 'Archives for Twenty First Century'?**

This aligns with the 'Sustainable services' and 'Community cultural, learning and economic outcomes' policies.

**5.        Date (span of work)**

2007-2010 and ongoing.

**6.        Details of any partnerships involved**

Heritage Lottery Fund

**7.        Budget and details of funding sources**

For the Carlisle relocation project HLF valued the volunteer contribution at £105,000 which was received in part funding.

**8.      Please describe any challenges or opportunities you faced**

Anne Rowe, Archive Service Manager says that an important outcome of the initial relocation project was that Cumbria Archive Service was able to make the transition from a 'traditional' approach to volunteering to a pro-active and business-like volunteering model. The earlier reactive approach, which left staff unsure of what to give volunteers to do has been replaced by one that seeks to engage volunteers in all activities of the service. Volunteers do not replace staff roles, but they do support staff to achieve large scale projects beyond our capacity and are now viewed as integral to service development.

**9.      What did you do in response to the challenges or opportunities?**

Instituted new effective and efficient systems and processes (see below).

**10.      What were the outcomes? Please use any statistical or qualitative data you may have to illustrate this. (200 words max)**

a) An enhanced service, with better cared for records, improved finding aids and more accessible archives
b) The recognition that volunteers can contribute to the whole business of the service
c) Recognition that a proactive approach and efficient volunteer management are essential if volunteers' full potential is to be realised
d) Volunteer roles and activities would be regularly embedded in the Service business plan
e) Specific volunteer-focused policies and procedures are essential for volunteer management. In Cumbria these included:

- A Volunteer Policy that clearly lays out principles, nature of tasks, recruitment processes, induction, on-going support, feedback (from volunteers) and monitoring and evaluation.
- A brief Application Form which requires such key information as preferred role or tasks, relevant skills and knowledge, days of availability and any medical conditions.
- Short guides to specific roles, such as research, preservation and guiding to help volunteers decide what they would like to do.
- A Volunteer Charter which lays out the benefits of volunteering, and the mutual responsibilities of both the service and the volunteer. This is signed by both parties in recognition of the mutually supportive nature of the relationship between them

**11.      Describe what you learned from the process: what went well: what didn't go quite as well? (200 words max)**

Matching volunteers skills with the jobs that need doing always requires careful consideration if both service and volunteers are going to benefit.

**12.      How will this work be developed in the future?**

All future volunteering projects will be managed using these new systems and processes.

**Please give URL link to website**

Cumbria Archive Service http://www.cumbria.gov.uk/archives/

**Case Study Two:  Pennine Horizons Digital Archive**

1. **Organisation**

Pennine Horizons Digital Archive (PHDA)

2. **Summary of activity**

This is an entirely digital archive and its creation forms part of Pennine Horizons, a 3-year HLF funded project which started in October 2012. The vision is to tell the 1000 year old story of the interaction between the Pennine landscape and the move from an agrarian to an industrial society.  It is based in the Birchcliffe Centre, a refurbished Baptist chapel in Hebden Bridge, in which a heritage art and education space has been created.  The volunteers are involved in two key projects.

*The Digital Archive*

PHDA consists of a number of photographic collections comprising over 12,000 images deposited by local photographers, societies, members of the public and businesses. These complemented the earliest deposit, a bequest by Alice Longstaff a well-known local photographer. Volunteers are undertaking the entire work of scanning, digitising and adding metadata to the images and the first 1000 are ready to be launched from a current total of 19,000 images in the database.  All original photographs (including glass plate negatives) will be deposited in appropriate archive in due course. Volunteers will also be heavily involved with the education officer in delivering a programme of learning based on the archive for both adults and schools in the education space.

*E-heritage Trails*

The Digital Archive is being used to contribute to the E-heritage trails that some of the volunteers are currently designing, writing and promoting. These Trails take place in and around the Calder Valley and enable people to explore the area on foot while having ready access to information – either in the form of an app or a volunteer guide - about the landscape, ecology or history to help in its interpretation. Five routes have already been developed (and the community is being invited to suggest more) one of which, the Fielden Town Trail has recruited the local Cub Scouts to help.

Overall there are 34 volunteers at Pennine Horizons, supported by Sarah Shooter, plus a part-time education officer and a part-time volunteer co-ordinator. Sarah strongly recommends the use of the Do-it website for recruiting volunteers. [27]

3. **Was this a project or part of ongoing business?**

A project funded by HLF.

4. **Which theme does this align to in the policy 'Archives for Twenty First Century'?**

This project aligns with the 'Digital as Standard' and 'Community cultural, learning and economic outcomes' policies.

5. **Date (span of work)**

2012-2015

6. **Details of any partnerships involved**

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[27] http://www.do-it.org.uk/

The project has been developed by a consortium of over two dozen local voluntary groups, also town and parish councils, and with the support of Calderdale MBC, and plans to engage with local communities across the South Pennines.

### 7. Budget and details of funding sources
Heritage Lottery Fund provided £524,000

### 8. Please describe any challenges or opportunities you faced (300 words max)
This is an innovative and exciting project that provides important insights into new and developing models of volunteering practice. It is unusual in that it is entirely digital. It was found that it is not always possible to fit volunteers with the jobs that need doing therefore, and that it is important to manage turnover and succession planning.

### 9. What did you do in response to the challenges or opportunities?
With such a large project it has been necessary to create appropriate policies, application forms and volunteer agreements, and to manage any slight resistance there might have been to this more 'business-like' approach by more carefully managing expectations.

### 10. What were the outcomes? Please use any statistical or qualitative data you may have to illustrate this. (200 words max)
This project has had a great impact on this particularly community. Here volunteers predominate, both in terms of numbers and the work done.  Prior to the HLF award a core group of volunteers had already been involved in the community photographic archive, and some of these sit on the current Project Board, fostering an important element of continuity and local knowledge. However the HLF funding has ensured that new volunteers could be recruited to complement them, and this was done by word of mouth, via the Do-it website and via local history societies – the latter were essential for the creation of the Heritage Trails. The Project Board says 'the Pennines have a unique landscape, a unique history and now we'll be able to bring this to life for a 21st century audience'.

### 11. Describe what you learned from the process: what went well: what didn't go quite as well? (200 words max)
As noted, it has been important to plan carefully to ensure that there is cover for all the work that needs to be done.

### 12. How will this work be developed in the future?
It is anticipated that the resource will continue to be available after the end of the project as a sustainable digital archive.

**Please give URL link to website**
Pennine Horizons  [http://www.pennine-horizons.org.uk/](http://www.pennine-horizons.org.uk/)