

TECHNICAL LEAFLET SERIES

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# Involving Volunteers In Archives



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Mid-Atlantic Regional  
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# Mid-Atlantic Regional Archives Conference

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**Editor's Note:** The idea for a technical leaflet series originated with the New York Caucus of MARAC. The series, as developed by the Caucus, is intended to provide brief, practical information about selected archival topics suitable especially for beginners in the profession.

The series editor welcomes proposals for future publications and comments from readers.

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# Involving Volunteers in Archives

by David W. Carmicheal

Ninety million Americans are looking for work--without pay. Would you like to hire a few? In fact, almost 90 million Americans participate in some form of volunteer activity every year. And, while relatively few may have yet found their way to your archives, they represent a vast pool of potential resources in nearly every community. Unfortunately, many archivists resist involving volunteers: they are not dependable, if I involve volunteers I won't be able to justify requests for additional paid staff, you can't criticize a volunteer because he/she will quit and leave tasks unfinished--the list of complaints is long and familiar. But such problems often result from lack of preparation on the part of the archives staff. With proper planning, volunteers can become a valuable part of the archives team. Volunteers need to be recruited carefully, assimilated adequately, and involved properly.

## Recruiting Volunteers

Recruiting the proper volunteers is as important as recruiting the proper staff. In fact, recruitment is easier if you think of volunteers as unpaid staff. To recruit the right volunteers first identify the type of workers you are looking for and what you are offering in exchange for their work, then look in the right place and screen potential volunteers carefully.

- 1. Determine what work you want done.** Disappointing experiences begin when the archivist looks for a volunteer to hang around and do anything that pops into the archivist's mind. Begin by asking yourself (and your staff), "why do I want a volunteer?" Are the records coming in faster than you can arrange and

describe them? Are the patrons overwhelming your research room staff? What specific tasks will volunteers do?

Dream about where you would utilize your existing staff if you could use them any way you wanted. This will help you determine the kind of volunteer you are looking for. Perhaps everyone on your staff enjoys arranging and describing records but no one likes to answer reference questions in the research room. Find an outgoing volunteer who enjoys interaction with patrons and you may release your staff to do the work they would rather be doing.

**2. Write a clear job description.** Write the description just as you would for a paid position. A well-written job description, which doubles as your job announcement, screens out would-be volunteers who aren't looking for the types of work you are offering and provides a standard by which you can evaluate volunteer performance. It must be flexible because you rarely find a single volunteer who can do all of the tasks you want done. For instance, if you want a volunteer who will come to the archives three days a week to answer the telephone, monitor the reference desk, and type correspondence, your job description should list each component separately. It is very unusual to be contacted by the "supervolunteer" who is willing and able to do everything on your list. It is more likely that you will find one person who is willing to do a certain amount of clerical work and another who would like to tend the reference desk one or two days a week. By listing separately each task you want done, you increase the likelihood of matching the right person to the right job.

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There are volunteers waiting to do nearly every task imaginable; don't scare off potential workers by insisting that they perform additional tasks for which they are not suited.

Your job description should illustrate the benefits of volunteering in your archives. Surveys indicate that most people volunteer to help others and to feel needed. Many others volunteer because they want to meet people, to learn something new, or to help them get a paying job. Each task has its own rewards; be certain to highlight them.

Job descriptions should be concise and easy to read. There is no standard format, but the following might be included:

- job title
- description of duties
- skills required
- days and hours volunteer is needed
- minimum length of commitment required (e.g. 6 months)
- whether and when training is provided
- contact person
- address and phone number of archives
- whether the building is accessible to the handicapped
- public transportation available (e.g., indicate which bus lines stop near the archives).

Your job description now becomes your job announcement.

**3. Finding the right volunteers.** If you are going fishing and you don't care what you catch, just throw the

line out anywhere. But if you want to catch bass, don't bother to throw your line into open water on a sunny day--bass prefer shaded water. Knowing something about the type of fish you want to catch will help you catch fish--and the same is true of volunteers. You have determined what you want the volunteer to do, now imagine the type of volunteer best-suited to perform each task. Volunteers may be college students, high school students, the unemployed, re-entry women, release time executives, retirees, housewives, relatives of employees, nursing home residents, foreign residents, and the home-bound, to mention just a few.

Narrow your search but beware of thinking too conventionally. Ask yourself questions: "When do I need these workers?" "Is this a task that can only be done between 9:00 and 5:00 while the archives is open?" Certain tasks may not be suitable for such groups as the home-bound, but try to think about your work creatively. Perhaps you have typing someone can do at home. In fact, if the typing is repetitious you are more likely to find a volunteer to do the work at home than to come to your office to do it. Most of us want our work done on the premises between 9:00 and 5:00, but the majority of people who volunteer are employed at least part-time and to recruit the right people you may need to adapt the work to fit their schedules.

Finally, find out where the potential volunteers are during the time you need them. Suppose you decide that housewives would make good volunteers for the type of work you envision and that they are needed between 10:00 and 2:00 on weekdays (you've chosen these hours because you know that many housewives have children

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and will come to the archives only during the hours that their children are in school). In order to target this group it is necessary to find out where they are on weekdays between 10:00 and 2:00. Are they at home? on the tennis court? in the grocery store? You must get your recruitment pitch to the intended audience, and the more closely you determine where your audience is the more successful you will be.

Determine who your competition is and where they are recruiting. Your competition may be the beach or the health club (recruit there), but it is likely that your competition also includes other non-profit agencies. Try to find out where the successful ones recruit. Many communities have non-profit agencies which do nothing but seek volunteers for other non-profit agencies. Look for these under "Social Service Organizations" in the yellow pages. You can also recruit through newspapers (in classified ads or feature stories), information and orientation meetings, bulletin boards (in laundromats, beauty shops, grocery stores), newsletters, alumni groups, corporations (perhaps through displays in lobbies), shopping centers (particularly on community service days), radio and television spots and talk shows, business group meetings (during speeches and presentations), retirement homes, your local PTA and Chamber of Commerce, libraries, schools (through guidance counselors), colleges (use the employment bulletin boards or placement service), and even grocery store lines (talk!).

**4. Select the right volunteers.** You would not hire a prospective employee without an interview; yet many archivists believe that if someone walks in off the street

and asks for work the archives is obliged to employ them. Schedule and conduct interviews with potential volunteers just as you would for a paid staff position. Make the potential volunteer feel comfortable and let him/her do most of the talking. In order to do that you will have to prepare the questions beforehand. Always ask open-ended questions (questions that cannot be answered with "yes" or "no"). For instance, you might ask "What kind of supervision do you prefer?" rather than "Do you prefer to be closely supervised?"

Use the interview to screen people into, rather than out of, your organization. Ascertain the prospective volunteer's skills and then imagine where these might be useful in your archives. If possible, determine what is motivating this person to seek a volunteer position and ask yourself whether you can meet such expectations. For example, archivists frequently encounter the potential volunteer who is actually more interested in doing personal research than working for the archives. Sometimes this can be handled by offering the person a certain amount of free time to conduct research in exchange for a certain amount of volunteer work. If you cannot meet the volunteer's expectations, do not try to involve him/her. The experience will disappoint you both.

Turn down the offer of help if you honestly believe that a prospective volunteer is not suitable for your organization. If you are unable to do this to his/her face, simply tell the prospective volunteer that you will be making a decision within one week and then write a polite letter. It is better to have no volunteers than the wrong volunteers.



### Involving Volunteers

To recruit volunteers is tough; to keep them is tougher still. Satisfied volunteers are those who know what is expected of them and who are given adequate training, meaningful work, and proper appreciation.

**1. Start right.** One of the easiest mistakes to make when involving volunteers is to bring them to the work area on the first day, assign them a (simple) task, and forget them. Instead, newcomers to the archives should be oriented to their work and how it fits into the bigger picture. Explain why the archives exists and exactly what it does. If the archives is a division in a larger organization, explain how it fits into the structure of its parent body. Be sure to tell the volunteer how his/her work helps the archives and how important it is to the staff and patrons of the institution. This should not be flattery but an honest evaluation of how much you are going to depend on the volunteer's contribution from now on.

Take the volunteer on a tour of the archives. Try to arrange the tour during a busy time so that the volunteer will see specific activities that he/she might be called upon to perform. Introduce the volunteer to the staff and other volunteers. Point out the location of facilities such as the kitchen and restrooms, and mention areas where smoking and eating are permitted and not permitted. It is helpful to prepare a handbook which contains this information and other details that the volunteer might want to be reminded of periodically.

Finally, sit down with the new volunteer and discuss the demands you will place on him/her. This may be the single most important interview you will have with your new volunteer. Perhaps the most common misconception about involving volunteers is that expectations must be kept low or they will quit coming. On the contrary, volunteers have high expectations and want to be held to exacting, but clearly defined, standards of performance. During this discussion, explain what you expect in terms of regular attendance, promptness, personal appearance and behavior. Keep such demands reasonable and explain that the requirements apply to all employees of the archives--whether paid or unpaid. Next, discuss what you will expect from this volunteer in particular. The best way to make such expectations clear is with a written agreement between the volunteer and the archives. Such an agreement might contain items such as a formal job description, the responsibilities of the volunteer (e.g., fulfillment of duties and time commitment; attendance at required sessions), the responsibilities of the archives (e.g., training and supervision; future work references), and the signatures of the volunteer and the archivist.

By completing a volunteer/agency agreement and reviewing it at stated times, you create a means for both the volunteers and yourself to evaluate the relationship. During the review you will be able to discuss how each party is meeting its agreed upon obligations and what changes may be necessary to the final agreement. If a volunteer remains with the archives a long time, the volunteer/agency agreement may become less necessary; but, particularly during the first months, such an

agreement can ease the assimilation of the volunteer into the archives.

**2. Train volunteers well.** Volunteers have been referred to above as unpaid staff, and, as such, they may be asked to do almost any job. But it is important to realize that unpaid volunteers soon come to resent their paid co-workers if there is not some distinction in the work each does. Generally, volunteers are not given as much responsibility as paid staff, but how this distinction works out in actual practice is different in each archives. Never make a distinction in the standard of work which is required from each. Once a standard is set, assign the task, train the volunteer properly, and then follow up to ensure that the standard is being met.

Some tasks are more easily learned in a group setting. It is possible, for instance, to train a group of four or five new volunteers using role playing. This type of training works particularly well for tasks which involve interaction with the public (e.g., reference work). Other tasks should be taught one-on-one so that the progress of the volunteer can be more closely monitored. If at all possible, pair each volunteer with a paid staff member or with an experienced volunteer. In this way the new volunteer will be taught by someone who understands each step of the work in its context.

No matter how training is conducted, it will proceed more rapidly if you teach skills in such a way that one builds upon another and if the volunteer sees how his/her work contributes to the overall work of the archives. This is especially important if the volunteer is responsible for only a small part of a large process. As

you train, explain the rationale behind each activity. Suppose, for instance, you would like the volunteer to arrange and describe a collection. The collection to be arranged is in chaos and you have determined that the most logical arrangement is alphabetical. Do not simply tell the volunteer to put the papers in alphabetical order. Not only will he/she get the notion that all archival collections should be arranged alphabetically (a notion which will take you a very long time to correct later), but the volunteer will come away from the training with no sound basis for making future decisions about arrangement. Instead, take the time to explain why archivists maintain the original order of records whenever possible and that in this instance, since the records arrived in the archives in no discernible order, one must be created. Explain why you selected alphabetical order and discuss other possible methods of arrangement.

Finally, do not make the mistake of continually asking your volunteers to complete tasks that no one on your staff wants to do. This is particularly important with new volunteers since the easiest tasks tend to be the most boring. Explain to the volunteer that he/she will be given more interesting assignments as time goes on, and then invest time to train the volunteer to do more complex and exciting work. Avoid "using" your volunteers--"involve" them instead.

**3. Make the work meaningful.** Proper training takes perseverance. It is easy to teach a volunteer just so much and then ask him/her to repeat the same task again and again. But if the volunteer is repeatedly asked to perform simple tasks requiring little skill and

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no responsibility, the work will soon lose its appeal. Most volunteers work because they want to feel that they are making a significant contribution to a worthwhile cause; the tasks they are assigned should be meaningful.

All meaningful work, however, is not exciting. Most volunteers will gladly perform even tedious duties if they are made to understand why the work is important to the archives. If you must assign a dull, tedious task, try to make an additional assignment at the same time--one that is more interesting to the volunteer--and let the volunteer divide his/her time between the two. Another way to make work more meaningful is to arrange the workroom and work schedule in such a way that no one works in isolation. However you choose to address the situation in your archives, remember that while you can give a volunteer almost any assignment, volunteers do not have the impetus of salary to attract them to work. You must motivate them by varying the work and making them feel that they are making a worthwhile contribution to the archives and its patrons.

Because volunteers are unpaid, you must demonstrate your appreciation of them in some other tangible way. Recognition can be publicly or privately expressed. You can send a birthday card; smile; give service pins; serve coffee; recognize their contributions at an annual ceremonial occasion; invite them to a staff meeting; listen to their opinions; recognize their personal needs and problems; provide a discount at the organization's shop, if there is one; provide a baby sitter; offer a free parking; provide good training; give them your time; send newsworthy information about them to prospective employees; create pleasant surroundings; recommend

them to prospective employees; send thank you notes. However you chooses to do so, recognize volunteers' contributions frequently and sincerely.

### **Assimilating Volunteers**

Incorporating volunteers into the archives can create conflict if it is not done sensitively. Steps must be taken to ensure staff acceptance, and volunteers who do not perform satisfactorily must be asked to leave.

**1. Help your staff accept volunteers.** Staff participation is essential to successful volunteer involvement. If your staff does not accept the volunteers, the program will be doomed from the outset. Proper preparation of staff attitude begins long before the first volunteer is recruited.

If each member of your staff has evaluated his/her own activities (as mentioned in the Recruiting segment, above) and sees the volunteer program as a means of freeing them to do more attractive duties, the prospect of involving volunteers should generate little resistance and probably outright enthusiasm. Once you have demonstrated that your staff has a stake in the volunteer program, allow them to help recruit and screen potential volunteers.

Once a volunteer is on the job, match him/her to staff members carefully. The staff member should train the volunteer and help evaluate his/her performance. The accountability of the volunteer to the staff person should be made clear to everyone in the archives so that the chain of command is clear. Paid staff must not be

allowed to dominate the volunteers, however, by making all of the decisions and handling all of the most important aspects of each project.

Just as both volunteers and staff share responsibility for work in the archives, both must be rewarded for a job well done. Managers frequently take the attitude that the paycheck is sufficient reward for the work of paid staff. Money is rarely sufficient motivation over a long period of time. As you recognize volunteers, remember to recognize staff as well. Recognition of staff make take different forms; for instance, if you use gifts or awards to reward volunteer contributions, you may want to recognize staff contributions at the same time but only verbally. However you do it, let your staff know that you appreciate them.

**2. Deal with problem volunteers.** No selection process is foolproof, so it is inevitable that you will periodically involve a volunteer who does not contribute effectively to the operation of the archives. Several times throughout this article it has been suggested that volunteers may be thought of as unpaid staff. Whenever a volunteer's work is not satisfactory, deal with him/her as you would a staff member.

Investigate the problem by talking to the staff member who is assigned to supervise the volunteer. Then discuss the problem with the volunteer. Depending on the problem, you may be able to solve it by reassigning the volunteer to other tasks or to another staff member. Perhaps the volunteer needs to be retrained or simply needs time off to become re-motivated. Try to avoid writing the volunteer off simply because the job is not

getting done at this time. People are more important than any task; take the time to discover why the volunteer is having the problem and then invest time in the person to solve the difficulty.

Sometimes the problems cannot be remedied. In this case the volunteer should be let go. Firing a volunteer seems to be a contradiction in terms, but this misconception creates intolerable situations. From the very beginning volunteers must understand that a certain standard of work will be expected of them. If the archivist's expectations are put into writing the volunteer will have a standard to work toward and the archivist will have recourse in the event that the volunteer's work does not meet those expectations.

Once you have determined that the volunteer must be released from the archives, thoroughly document the conduct that led to your action. Put in writing the steps that you took to investigate the problems and the results of your investigation. Be sure to point out how the action taken by the volunteer violated your volunteer/agency agreement. Make certain that the volunteer knows exactly why you are asking him/her not to return, and demonstrate that you have acted under a written policy which is fair and applicable to both paid and unpaid staff. You may explain the contents of your report to the volunteer or allow him/her to read it. After the volunteer has left, you may want to explain your action to the rest of the staff to avoid any misunderstandings about your actions.

Fortunately, because volunteers work for reasons other than salary, the archivist will rarely be called upon to



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fire one. Volunteers tend to be enthusiastic, willing, self-motivated workers. It is just this attitude which makes involving volunteers so rewarding. The keys to an agreeable experience are careful recruiting, proper involvement, and adequate assimilation. The archivist will find that well planned volunteer involvement is an investment which pays attractive dividends.

## Suggested Readings

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