

ARCHIVES VOLUNTEERS: WORTH THE EFFORT?

BY RHONDA HUBER FREVERT

ABSTRACT: Archivists can benefit from increased and improved use of volunteers to increase work output, provide fresh insight and act as public relations advocates, but they must also be aware of the potential drawbacks associated with volunteers. Every archival repository has unique considerations and should evaluate whether the possible benefits of using volunteers as a resource will outweigh the drawbacks for that repository. To make effective use of this resource, staff must be willing to treat volunteer use as an integral, worthwhile part of the archival program and invest adequate, ongoing time to planning and managing a volunteer program.

A 1994 study argues that declining financial support for libraries and rising public demands for increasingly complicated and sophisticated services clearly indicate a current need for volunteers in libraries.¹ With nearly 80 million Americans doing some sort of volunteer work each year, archivists, like librarians, should be aware of this potential resource.² As a profession and within each repository, archivists need to develop an understanding of the benefits and drawbacks of using volunteers, make an informed decision about whether volunteer use is worth the effort and, when appropriate, integrate volunteers into the operations of their repositories.

As a means of illustrating some of the key issues faced in using volunteers and assessing whether they can be a viable resource for archives, the twelve Wisconsin Area Research Centers were surveyed for this study. A relatively homogeneous group of archival repositories, the ARC Network assigns each archives the responsibility for a specific geographic area of the state. All but one ARC repository is situated within a University of Wisconsin System library. While the size and number of staff vary among the archives, the type of collections and institutional regulations are similar.³

All but one of the ARC network repositories are currently using volunteers or have used them in the past. Even though the majority of the archives in the ARC Network use volunteers, most characterize their volunteer use as not active, occasional, or infrequent. Actively using volunteers does not mean using a large number of volunteers. Instead, active use requires including volunteer use in the repository's planning and policy making as well as taking an active approach to recruiting and managing volunteers. With few ARC repositories having any policy in place for volunteer use and most stressing that they "never solicit volunteers," one could get the impression that

these archives would not have volunteers if people did not come to them. Although volunteers, in this sample, are not an integral part of the archive programs, the survey did expose many of the positive, as well as negative, aspects of volunteer use. Using the example of the ARC network repositories' experiences with volunteer use, other archivists can access the advantages and disadvantages described, and decide if volunteer use is right for their archival program.

Lack of resources, such as money and staff time, is a common reason that archivists turn to volunteers for help. One survey respondent reported that he had anticipated a 75 percent cut in his student staff budget and thought he would have to consider using community volunteers. Although it may play a factor in causing archivists to initially investigate the potential of volunteer help, lack of adequate resources should not be the only or primary reason a repository ultimately decides to use volunteer workers. At least one author contends that using volunteers only because of financial hardship "is a rather negative statement...The implied corollary is that if there was sufficient money, or staff, or whatever, then volunteers would not be necessary. This makes volunteers a second-choice resource."⁴ Regarding volunteers as a second choice often leads to problems in implementing a volunteer program and to a staff attitude that volunteers are being used only because of budget problems. Volunteers are not a solution to budget cuts. The reasons for budget cuts must be addressed directly and volunteers must be treated as a separate issue. Volunteers should not be used as a stopgap measure.

Advantages

There are reasons to make volunteers a "first-choice" resource in archives. For many small archives, "volunteer services are the lifeblood...In fact, most could not exist and could not continue without the dedicated efforts of their honorary archivists."⁵ The time and energy put into a good volunteer program can be returned many times over in increased work output, fresh insights, public relations advocacy, and donations of both financial resources and collections.

The most obvious benefit to using volunteers is the ability to get more work done. When asked what they feel are the benefits of volunteer use, whether experienced at their archives or hypothetically, nearly all of the ARC archivists who have used volunteers point to the chance to relieve backlogs in processing or to undertake projects long on the wish list of the staff or users. For example, many of the surveyed repositories use volunteers to do indexing of genealogical research materials and newspapers. Such projects usually would not be a high staff priority, but can benefit genealogists, one of the archives' principle users. Other duties include processing and answering off-site client requests for information, clerical duties such as typing and filing, simple preservation activities, document translation, photograph identification, newspaper clipping, reading room assistance, and compilation of guides to genealogy collections.⁶ Special events such as genealogy workshops held at two of the ARC repositories would not be possible without the extra volunteer help used in planning and implementing such a large project. By taking on nonessential tasks and special projects, volunteers free up staff to perform their professional duties and can increase staff productivity.

Another valuable function of volunteers, cited less frequently by the ARC archivists, is the potential of volunteers to provide fresh insight. When volunteers work in the archives and get a behind-the-scenes view of the work that is done there, they become a ready-made group of informed users as well as representatives of the community. In this role they may be encouraged to share ideas and needs. Such fresh insight can engender impractical or archivally-unsound ideas, but it also can produce new, valuable ideas that staff, being so close to their daily work, would not think of trying. When working with volunteers, archivists must be ready to deal with both types of ideas by being open to accepting new ideas and ready to redirect the impractical ones.

The fresh perspective of volunteers also can be a result of their diversity of life experiences and ages. Retired university staff are the primary volunteers at one ARC. These people are experts in certain areas and already are familiar with the university and personnel. A volunteer who is a retired journalist could be an invaluable asset to the public relations program of the archives. Volunteers with experience producing newsletters or speaking in public would give the archivist the opportunity to increase the repository's outreach efforts. In some cases, a volunteer can be recruited for such special skills. One ARC is using a volunteer to translate cemetery records that are in Yiddish. Another ARC uses volunteers to identify local photographs. The two original volunteers for that project were in their thirties and found some of the pictures difficult to identify so they recruited one of their fathers whose age and length of time in the community offered a clear advantage. The older images in the collection were identified and the archives had a new volunteer.

While some individuals volunteer purely as a chance to socialize with new people, volunteers generally have a genuine interest in the task they are doing or they probably would not keep donating their time to doing it. One archivist claims greater accuracy as a benefit that derives from this greater interest. Another archivist notes that most volunteers want to learn something as opposed to some student workers who see their work at the archives as "just a job." Using volunteers is thus beneficial, as one respondent comments, as "a chance to teach and for volunteers to learn." Tapping into the interests and enthusiasm of volunteers is a positive reason to engage their services.

Volunteers also can be valuable public relations advocates for an archival program.⁷ If their volunteer experience is positive, they will be advocates for archives each time they talk about these experiences with a friend or family member. When they talk to others about the work and services offered by the archives, volunteers are respected as peers and as people who are demonstrating their commitment through action. Furthermore, many people may have questions about what really goes on at the archives, whether they can use it, and how to use the services available. Volunteers can be less intimidating to approach than professional staff.

The better informed volunteers are, the more effectively they can advocate the archives program in the community. Therefore, it is important to communicate openly with volunteers through a newsletter, informal conversations, inclusion in staff meetings, or by other means.⁸ Volunteers need to feel that their work is meaningful. They need to understand the reason behind the tasks they are doing, and how these tasks fit into the larger goals of the archives in order to better explain the purpose of the archival programs

to outsiders. Not only can a volunteer's advocacy bring in new potential volunteers and donors, it also can possibly build networks with other groups in which a volunteer is involved, such as service clubs and genealogical or historical societies. Some ARCs are already using this advantage to open up cooperation with other groups.

In their advocating role, volunteers also can assist in collections development. They may have historically significant collections in their own possession that they will consider donating after learning more about the archives. They will feel more comfortable donating when they know that collections are well cared for at the repository, and they may pass on this confidence to others. By communicating with others in the community regarding the importance of the archives in preserving historically valuable materials, they can encourage friends, family, coworkers, and fellow club members to learn more about donating collections of materials they may have in their possession.

Volunteers can become activists when the need arises in order to convince policy makers and resource allocators of the importance of archival programs. While staff can inform the community and officials about the need for continued moral and financial support of the archives, they may be viewed as self-serving and merely protecting their jobs. Volunteers can be used to actively campaign for the archives. They are both informed through their work in the archives and seen by others as more impartial than staff because they do not profit monetarily from the existence of the archival program. Their credibility is further enhanced because they are giving their time freely. By actively working to make a difference, volunteers demonstrate the importance of the program to themselves as individuals. Through volunteer advocates, the archives services are tied to people who benefit and believe in them, rather than to statistics alone. The credibility of the archives' request for support and funding is enhanced when volunteers are a part of the program because they demonstrate that the archives is doing all that is possible to provide quality services with the resources available. Furthermore, a volunteer is a voter. This fact is particularly advantageous when approaching elected officials for support.⁹

While volunteers are typically valued because of the time that they donate to an agency, they should not be overlooked as potential financial contributors. Volunteers "give more financial support to not-for-profit organizations than those who do not volunteer".¹⁰ Because of their feeling of connection and commitment to the archives, volunteers will typically be faithful participants at public workshops, lectures, and other events, as well as consistent contributors to fund drives. Not only will they give money when asked to support a need, but volunteers also may donate supplies or other items needed for their project that would not be available in the archives' budget.

Disadvantages

After reviewing the benefits that volunteers can bring to an archival program, volunteers may sound too good to be true. However, there are also drawbacks that must be considered before rushing out to bring in a cadre of volunteers. Audray Bateman Randle maintains, "Until recently managers of archival and records repositories have been hesitant to use volunteers." She cites negative responses to volunteer use such as the staff's already overworked condition, the fact that volunteers are not dependable, won't

last long, can do only routine or boring tasks, and are a potential security risk.¹¹ The survey of the ARC network repositories reveals similar reactions to the possible drawbacks of using volunteers.

One potential drawback is the time needed to plan for, find, select, assign, train, supervise, motivate, and praise volunteers. That list of tasks alone can sound daunting. Volunteers are unpaid staff and all the demands of managing paid staff pertain to volunteers. The management of volunteers will usually take a greater amount of time and effort than will managing paid staff.¹² This rule of thumb is true, in part, because volunteers will not have professional training in the field. One surveyed archivist says that volunteers and interns pop in with questions or ask for advice frequently, and it is sometimes difficult to keep up with them and get anything else done. The same respondent prefers student interns because they already have some training in that they are history majors, whereas more time may be needed with volunteers to teach them what a historic record is. Volunteers will also work fewer hours requiring more time to reacquaint themselves with a project after being away for a week or a few days. One respondent, while not speaking directly about volunteers, expresses his frustration with the time needed for supervision when he observes, "any time we have more than seven or eight student assistants, supervision becomes a problem. I have less and less time for work in my own shop, it seems, and sometimes spend no more than half of a given week actually doing special collections work." Unfortunately, repositories that most need the extra help may not have the staff time available to carry out a successful program. Without the resource of time to commit to volunteers, a repository may choose not to use them or may use them without devoting the necessary time and have less than desirable results.

Volunteers are sometimes referred to as "free help," but these "presumably cheap" resources can "cost more than their nonsalaries" if they are not managed well.¹³ While public relations advocacy can be a positive reason for encouraging volunteers, there is also the potential for damage. A volunteer who has a negative experience will be talking to community members too, and often can be more vocal than a volunteer who is enjoying the experience. A repository considering volunteers must "be sure your 'house is in order' before opening the doors to recruit help from members of the public."¹⁴ If there are internal problems such as staff squabbles or poor coordination of duties, volunteers will see this and may discuss it with others. This potential for negative publicity reinforces the importance of being prepared before using volunteers and encouraging volunteers who have a good experience to share their positive feelings with others.

Volunteers may also need to be told what is appropriate to share with others and what is not, and when their ideas are helpful and when they are intrusive. As previously noted, the ideas offered by volunteers will not always be practical ones. In some cases, "pressure comes from individual board members and other active volunteers to do things differently, to emphasize one priority over another, to change direction."¹⁵ One respondent to the survey feels that the "intimate secrets" of the archives are being revealed. She explains that every archives has a way of doing things and there are reasons for these methods. Her volunteers, in most cases, have been users of the archives for over ten years. They feel comfortable there and do not feel shy about questioning and criticizing the archives' methods. While recognizing the benefit of "fresh

eyes” and new ideas, this archivist points to the need to draw a line between a person’s role as a volunteer and as a user, and to define when it is appropriate for a volunteer to question methods and when it is out of line, such as criticizing staff in front of users and revealing details of security measures.

Another potential drawback cited by one archivist surveyed is that of security. There is the obvious risk of theft of valuable items from collections or of office equipment. Another possibility is that confidential information from restricted collections could be released. Depending on the projects volunteers are doing, using the same security procedures for staff may be too relaxed and the security measures that apply to users may be too restrictive. Screening during recruitment and ongoing supervision after placement as well as clear training regarding the rules of appropriate behavior are essential to minimize this risk.

David Carmicheal, in *Involving Volunteers in Archives*, a short, primarily how-to guide, cites three reasons why archivists resist using volunteers: volunteers’ lack of dependability, staff’s inability to criticize a volunteer’s work, and the threat that volunteers pose to staff jobs.¹⁶ Regarding the first, an archivist in the survey tried to recruit volunteers from the local historical society, but they came for only one or two hours and never returned. Still another archivist in the survey is reluctant to spend the time training a volunteer and then have the person leave.

One survey respondent argues that, if one opens the archives up to community volunteers, it’s hard to turn anyone down. The archives would be “stuck with them.” He prefers student interns because he can say “no” to them more easily, citing the limit of interns he can have each term. This respondent and another who is concerned about the varying proficiency levels of volunteers both are expressing a basic concern for accountability. Volunteers give their time freely, and it can be difficult to hold them accountable for a standard of performance, or to address problems that may occur if mistakes are made.

Scheduling can be another hurdle in using volunteers. Volunteers may work irregular hours, or only one to two hours a week. Two respondents to the survey perceive scheduling as a problem. One refers to the difficulty of matching the archives’ hours to those of the volunteer. The other comments that an archives may get only “bits and pieces” of time from a volunteer. This limited schedule makes it difficult for volunteers to learn reference duties or other tasks that require a long-term familiarity with the archives or a commitment to a project. Volunteers also are more likely to take frequent vacations, especially if they are retired volunteers, or to let other interests, needs, and whims come before their volunteer work. While some volunteers will be making a long-term commitment, “on balance, it seems that there is a clear shift occurring toward a preference for being a Short Term Volunteer.”¹⁷ As one archivist in the survey comments, it is best to be clear from the start that volunteers are often short-term resources and not to put them in indispensable or irreplaceable positions within the archives. The short-term nature and irregular hours of volunteers requires that a repository be flexible and realistic about what to expect from volunteers.

Anyone using volunteers must remember that volunteers are positive resources only when they augment, not replace, paid staff. Carmicheal’s third reason that volunteers have not been used in archives is the fear that, when volunteers are used, archivists

“won’t be able to justify requests for additional paid staff.”¹⁸ Librarian Sally Gardner Reed cites a colleague’s “pothole metaphor” to describe this problem.

No city will ever be motivated to spend precious resources on filling potholes if concerned citizens get out there and fill them themselves. Not only will money for filling potholes be hard to get if there is no visible problem, but concerned citizens are unlikely to have the skill necessary to fill potholes well enough to provide a somewhat lasting solution.¹⁹

She answers this concern by stating that “volunteers should never be used to *replace* paid staff.” Volunteers should be used for tasks that are limited term or generic enough that there would be no drop in service if the volunteer leaves.²⁰ Ongoing tasks requiring specific skills, in most cases, should be given to paid staff.

Three ARC survey respondents point to union concerns in using volunteers. One senses a “morale problem” that results if volunteers are used for long-term projects because staff are “concerned about their jobs.” When volunteers take on long-term duties, staff may perceive their jobs as being in danger. One repository that has not used volunteers cites a strong union as the reason. The director of the library in which the archives resides agrees with the classified staff position that volunteers threaten paid positions and does not allow volunteer use. Just as using volunteers does not solve budget problems, volunteers also do not replace the need for additional qualified, long-term paid staff. As one archivist commented at the end of his survey, what he really needs is permanent staff.

Volunteer use has been questioned not only for its potential to limit new paid staff positions, but also for its potential to replace existing staff. Sally Gardner Reed cautions, when making a case for using staff time for volunteer management, “just be careful...you don’t oversell the idea of volunteers.” She adds,

It’s hard enough to convince government leaders that running a library [or archives] is a complex task that requires many levels of skills and education. Too many government leaders lacking an appreciation for what we do will be only too delighted to do what they might believe is supporting a conversion of paid employees to a volunteer workforce.²¹

To limit this potential threat to staff morale and to staff funding, all staff members should be involved from the initial stage of planning for volunteer use. By asking for their input from the start any negative attitudes can be addressed. If staff “feel[s] secure about their jobs and unthreatened by volunteers who may take over some of their assigned tasks,” the potential problems in staff-volunteer relations may be avoided.²² Equally important is to understand the funding officials’ attitudes toward volunteers and make clear the distinctions between staff and volunteer capabilities.

Assessing the Viability of Volunteer Use

Each repository has unique considerations and should evaluate whether the possible benefits of using volunteers as a resource will outweigh the drawbacks for that repository. Will the increased demand on staff time be justified by the increased work output? Will volunteers free staff from performing routine tasks so that they can concentrate on

professional duties, or would providing adequate training and supervision of volunteers keep staff from their duties? Can volunteers provide a positive connection to the community, or will they pose a security risk? Are staff members open to using volunteers or apprehensive or even hostile toward the idea of volunteers?

Planning a Successful Program

If one does decide to use volunteers, the archives staff must begin by determining how volunteers will be used to reach goals and fulfill the mission of the archives. Why is the archives using volunteers? What results are desired? By understanding how volunteers fit into the overall mission, it is easier to justify their use, choose appropriate tasks, and evaluate the results.²³

Defining suitable tasks for volunteers is key to a successful program. As the ARC sample demonstrates, there is a wide range of specific tasks that can be done by volunteers, from indexing to processing to developing guides or pathfinders. Other possible tasks for volunteers are typing letters, proofreading, teaching workshops, guiding school tours, planning a fundraiser, presenting programs in local schools, or assisting with other outreach activities.²⁴ One way to expand upon this list of ideas is to not limit one's perception of who a volunteer is. If one perceives a volunteer as an elderly woman, then the tasks that come to mind will be confined to this picture of a volunteer. Instead, consider what is already being done that needs continuation, what needs are unmet, or what would be done if there were more time or someone available with a special skill.²⁵ When developing this list of possible tasks, one should "dream about where you would utilize your existing staff if you could use them any way you wanted" and then involve volunteers in performing the tasks that may be keeping the staff from that dream.²⁶

Volunteers "do not function well or productively if they are given only routine chores or busy work."²⁷ When designing volunteer jobs consider what motivates volunteers to work in an archival repository. It may be a love of history, a desire to meet new people or a quest to learn something new. Using a volunteer "to just hang around" as extra help is not enough.²⁸ People who are donating their time do not want it to go unused. A specific, well-defined task is needed or a volunteer will lose interest and leave unsatisfied. Yet, while it is important to take a volunteer's interests and desires into account when assigning a task, it is equally, if not more, important to remember, as one respondent noted, that volunteers are used to get something done that the archives needs done, not what the volunteer wants to do.

Having a general written policy that applies to all volunteers is a good way to make expectations and procedures clear to both staff and volunteer, and to avoid some of the common pitfalls of volunteer use. A policy should cover the following areas: attendance requirements, performance evaluation procedures, benefits of volunteering, training offered, grievance procedures, reimbursement policies, use of the repositories' equipment and work areas, confidentiality requirements, termination procedures, record-keeping requirements, and liability issues. The policy can be modeled after the one in place for paid staff.²⁹ For some of these issues, it may be necessary to consult outside sources, such as the parent organization's lawyer and insurance carrier who can assist in preparing for liability concerns.

The next step in planning for volunteer use is deciding who will manage the volunteer program. All staff should be made a part of the planning, but one designated contact person/coordinator should be selected for implementation in order to insure a more expedient and consistent program. This person would serve as the link between paid staff and volunteers and be responsible for recruiting, placement, general training, scheduling, record keeping, evaluating, and rewarding of the volunteers.³⁰ Assigning these duties should not be a haphazard decision. According to Marlene Wilson, a well-respected authority on volunteer administration, "there is one common denominator in an amazing number of volunteer programs experiencing difficulty. It is not the volunteers, not the client, but the person directing the volunteer program." She argues that often the job of managing the volunteers goes to the staff member who has some free time, but not necessarily any interest. In addition, little training is offered to the person taking on these new duties, and support from the administration and other staff is sporadic. Given these conditions, she maintains that "it is frequently difficult to ascertain if this assignment should be regarded as a promotion or demotion."³¹

Even if a repository does not currently have the staff time necessary to supervise volunteers, there are still ways to include volunteer help. Because volunteers can add hundreds of work hours per year, a strong case can be made for adding a new paid staff member as coordinator. With a person on staff whose primary duty is managing volunteers, an active, consistent program is possible.³² For archives, such as the ARC repositories, that are part of a library that may already use volunteers and have a volunteer coordinator, the library's coordinator could be educated as to the needs and requirement of the archives and take on the recruiting and basic coordinating duties.

Once a need has been determined, a policy set, and management duties assigned, the list of possible tasks must be formalized as job descriptions. Basically, a volunteer's job description can be modeled on those used for paid staff. The University of Wisconsin-La Crosse's job description for staff assistant is a good example of what to include. The description details the time commitment required, the training and feedback the volunteer can expect, and the benefits of volunteering such as receipt of a library card, use of the lounge, and invitation to special events. It also makes clear that volunteers, unlike staff, do not receive parking privileges and are not covered by workers compensation.

Recruiting Volunteers

A good job description can be utilized when planning for volunteer recruitment and determining where to find people with the skills a particular job requires. Most of the surveyed ARC archivists do little or no recruiting. They are using volunteers from within the university, such as students or retired staff, who come to the archives seeking volunteer work. This method may be the easiest and least time consuming, but it is not generally the best way to find the best person for a needed task. A benefit of this approach is that, as one respondent commented, if a person comes in on his or her own accord, he or she is showing a real interest in being there. Another archivist takes no "off the street" volunteers because that opens the archives up to too many unknowns. Although mentioned by only one respondent, archival users are a potential source of

volunteers who already are known and who have a demonstrated interest. This archivist has two long-term volunteers who have also been long-term researchers for over ten years. Another good source that four archivists mention is turning to other organizations such as historical and genealogical societies which are made up of people who already have an expressed interest in history.

Audray Bateman Randle notes several more possible volunteer sources not mentioned in this survey such as civic and professional organizations, volunteer bureaus (Voluntary Action Centers, Retired Senior Volunteer Programs, United Ways, and more), senior groups, and handicapped citizens or restitution volunteers.³³ Homebound community members can be recruited to perform tasks such as clipping newspapers or indexing. Teenagers, while needing extra supervision and direction in most cases, also can offer their energy and enthusiasm during summer break.³⁴ For archives such as most of the ARC repositories that are located within a university setting, alumni associations provide a good source of potential volunteers with an interest in the preservation of the collections. Friends groups, whether for the library or the archives, are also good resources for people already making a commitment to the library or archives. Retired community leaders are highly sought after for their expertise and connections. Some companies encourage employees to get involved in the community through volunteering and can thus be a good contact. Community college and other university students can benefit from the experience as much as the archives benefits from their services.³⁵

The next step in planning a volunteer program is to recruit participants. One way to reach possible volunteers is advertising the specific needs, skills required, and benefits in local newspapers, on radio and television, at grocery stores, in libraries, at local schools, on community bulletin boards, at group meetings and in relevant newsletters. If opening up the volunteer pool in such a widespread way is not appropriate for a particular task or institution, similar advertising methods can be used for a target group.³⁶ Word of mouth is an efficient method because without cost or time spent, it brings in people already known to the staff or other volunteers. In their advocacy role, "happy volunteers will speak to their friends about becoming volunteers...and thereby increase the number of available, qualified volunteers."³⁷ Direct contacts are usually the most productive because "most busy people wait until someone asks them to volunteer."³⁸ Volunteer recruitment can be included in articles about the archives because those reading them will be people most likely to have an active interest. Timing volunteer recruitment "shortly before a centennial or similar celebration takes advantage of the natural level of interest"³⁹ and allows access to a large number of people at a time when they are most aware of their history.

When people begin to come to the archives offering to volunteer as a result of the recruiting efforts, a procedure for screening volunteers should already be in place. The volunteer manager must remember that this stage of recruitment is the most important because, with good screening, many potential problems with volunteers such as accountability, security, and turnover can be avoided. Most experienced volunteer managers would agree that it is always "better to have no volunteers than the wrong volunteers."⁴⁰ While application forms and interviews may seem too formal, they convey to

the potential volunteer that “the status of volunteer [is] a distinction which must be earned and maintained.”⁴¹

An application form should record the basic information such as name, address, and phone number as well as the applicant’s talents, interest, and experiences. Asking for references is also a valid and wise request. The references should be checked before accepting a volunteer. This step does not guarantee that a problem volunteer will be avoided, but it is better to have tried than to find out later that a simple reference check could have prevented a troubling situation.

After a person fills out the application, an interview can follow immediately or be scheduled for a later date. Most of the archivists surveyed use an informal interview to get to know the potential volunteer and to give the person information about the archives and the task needed to be done. The interview is a chance to get acquainted, learn the potential volunteer’s expectations and make the needs of the archives clear. The expectations of the volunteer may be that he or she will be working with yellowed parchments but, as one respondent points out, the work of the archives is usually more routine and mundane than that. Such misconceptions about archival work can be cleared up in the interview so that a volunteer is not disappointed when the assigned tasks do not live up to these expectations. Also, by having defined what personal qualities are desired or needed in a volunteer, such as reliability and a genuine interest in history, archives, or genealogy, the interviewer can select applicants that will fit the archives’ needs. If an applicant is found to be unsuitable or has unreasonable expectations, then he or she should be tactfully turned down either at the end of the interview or through a follow-up phone call or letter.⁴²

Matching the Volunteer to the Job

When a person is found who meet the needs of the archives, and the archives meets his or her needs, the next step is to find the right task. The interests and skills of the volunteers, in large part, will determine the appropriate placement. The volunteer’s desires should not dictate the task, but be a guide to fitting the person into a task that the archives needs done. If a person is not known to the volunteer manager, the person can be placed at the lowest level of task that is commensurate with his or her interests and skills. This arrangement allows for a trial period in which the person’s reliability and skill are observed. A low-level task will require less training time, so if the person is found to be unsuitable or unreliable, not as much time will have been invested. The person can be eased into more responsibility and have a chance to “move up the ladder” as the supervisor feels comfortable with the relationship, and as the volunteer gains confidence in performing the task.⁴³

Training for Success

Once a volunteer is assigned a task, adequate training is necessary because “undirected volunteers waste not only their own time and energy, but also staff time and energy.”⁴⁴ A good place to begin is to return again to the job description. The original description of the job may need to be modified depending on the volunteer chosen. By

writing a personalized description together with the volunteer, the manager has a chance to clarify the expectations and the volunteer has a chance to actively contribute and feel a part of the process from the start. If the description is clear and each task is listed separately, it can serve as a training tool to which the volunteer can refer when questions arise. Some organizations choose to use volunteer service agreements which focus on what the volunteer will learn and how the agency will help the volunteer learn. Such an agreement stresses the volunteer's needs while not giving all control to the volunteer.⁴⁵ Whether through a personalized job description or a service agreement, volunteers should know that their needs are valued and know how they will serve the needs of the archives through their assigned duties.

A general orientation to the archives will provide the volunteer with an understanding of how his or her task fits into the larger operations and goals as well as make the volunteer feel welcome. An introduction to the staff, a tour of the facilities, and the general facts about the repository should be included. If the volunteer manager will not be the supervisor for the volunteer's task, the supervisor should be introduced. Work rules such as how to handle absences, security procedures, record-keeping requirements, and phone use policy should also be made clear at this time. A volunteer contract or agreement is a formal way to make sure the rules and expectations have been made clear. Such an agreement would outline the expected commitment, the benefits, responsibilities, and limits and lines of authority. By both manager and volunteer signing the agreement, both can refer to it if problems arise. Another formal training tool is a written manual that would include all the orientation elements in writing. The manual could also include a letter of welcome, map of the facility, brochures, newsletters, and a reading list for more information.⁴⁶ Without proper training a volunteer may be frustrated and leave, or the project may be done improperly and need to be redone at a significant cost of time and possibly money.

Supervising and Evaluating

To ensure that the results of a volunteer's task meet the archives' expectations, and to keep up the volunteer's enthusiasm, ongoing supervision must follow the initial training. After a volunteer begins a project, the supervisor can gradually diminish direct oversight but should not stop giving and seeking feedback.⁴⁷ The supervisor sets the tone and the standards and should be regarded as the authority with final control of the project. A supervisor can inspire commitment by setting high goals and standards, providing good supervision, and praising the volunteer's efforts. "If the supervisor performs well on the job, and treats others with loyalty and respect, they will return the favor."⁴⁸ Good volunteer supervision requires the same skill as supervising paid staff.

Supervision also includes keeping good records. A personnel file for each volunteer should be started to hold the application form, interview notes, job description, information on completed projects, a contact number in case of emergency, the hours worked, and evaluations. This information can be used both to evaluate the individual volunteer to determine if more training or a new job assignment is needed or if the person is becoming bored with a task and is ready for more responsibility. This evaluation is a chance to give feedback and to get ideas from the volunteer. Another way to use the

personnel records of volunteers is to evaluate the volunteer program. Every year or whenever deemed necessary, the volunteer manager should ask if the program is still a beneficial resource for the archives and address any problems.⁴⁹ Another good source in evaluating the program is to conduct an exit interview when a volunteer leaves the program. At that time, the volunteer will usually feel open to expressing both negative and positive experiences with volunteering in the archives. This feedback should also be recorded in the volunteer's personnel file and used to improve the experience for other volunteers.⁵⁰

Dealing with Problems

Another more unpleasant reality of supervision is dealing with problems. Even the most committed volunteer manager has horror stories to tell. Some typical volunteer problems include a bad attitude, a diminishing of skills due to aging, a know-it-all attitude that interferes with management, a lack of clear boundaries, frequent absence, and even unwanted gifts. These problems can usually be handled by making expectations clear from the start, reassigning, redirecting or retraining, and directly discussing the problem. Such problems will require patience and sometimes creativity from the volunteer manager who will want to respect the volunteer while also protecting the archives.⁵¹ "Disciplining them is difficult, and managers of the volunteers must always be diplomatic."⁵² David Carmicheal argues, "People are more important than any task; take the time to discover why the volunteer is having the problems and then invest time in the person to solve the difficulty."⁵³ This attitude is wonderful in the best of worlds. Certainly, the volunteer manager should try to solve the problem, but a volunteer manager is not a counselor and may not have the time to address some problems. Dismissing or firing a volunteer, while not a first solution for most problems, is called for when big problems such as stealing, continual rudeness to patrons, or substance abuse are involved. It is hoped that good screening and reference checking will uncover these problems and the person will not be accepted as a volunteer. It is easier to turn someone down at the start than to dismiss him or her later. When firing is necessary, the manager should document each step and explain to the rest of the staff and, if necessary, other volunteers the reasons so that no misunderstandings occur. Having a written policy and signed volunteer contract will make this procedure easier because the manager can point to specific violations.⁵⁴

Providing Recognition and Thanks

Problem volunteers will be the exception, if there has been adequate planning, screening, training, and supervision. Volunteer managers, even with their horror stories, stay at it because of all the positive stories of successful projects and the chance to work with committed, giving people. Managers will enjoy being able to thank the generous, hardworking volunteers and recognize their importance to the archives. Recognition of volunteers can be in formal ways such as an annual luncheon or dinner or, as the surveyed archives demonstrate, through informal, ongoing encouragement. Informal ways that the surveyed archivists have found to thank their volunteers include small

gifts, thank-you letters or certificates when projects are completed, a note in the annual report about volunteer contributions or a letter of recommendation. Volunteers at one archives' genealogy workshop get free registration and a free lunch the day of the event. Ongoing, informal, creative and personal "thank yous" stress to the volunteers that they are special individuals in the operation of the archives. A means of recognition that benefits both the volunteer and the archives is a press release. Including volunteers in publicity pictures and including their volunteer title in the caption, sending an end-of-year press release about the cumulative contribution of volunteers, or letting the press know when a major project is completed by volunteers are all ways of letting the public know that the archives uses and needs volunteers, of thanking the volunteer publicly, and of generally getting the archives' name in the paper.

Sally Gardner Reed discovered that many libraries use volunteers, but she argues that they do so haphazardly without a plan or an active role in managing. In her plea to librarians she maintains that "by spending the time or effort necessary to develop a well-managed volunteer force that includes aggressive recruitment and systematic placement, training and development programs for their volunteer staff, the value of volunteer services for your library can be enhanced immeasurably."⁵⁵ Archival repositories can benefit from increased and improved use of volunteers to increase work output, provide fresh insight, and act as public relations advocates, but staff must be willing to treat volunteer use as an integral, worthwhile part of the archival program and invest adequate, ongoing time and planning in order to make effective use of this potential resource.

ABOUT THE AUTHOR: Rhonda Huber Frevert served as the Coordinator of Volunteers/Assistant to the Director at the Beloit Historical Society for over three years. A recent graduate of the University of Wisconsin-Milwaukee's dual masters degree program in History and Library and Information Science, she worked at the University's Archives for two years and interned at two historical society archives. Rhonda currently is a Reference Librarian at the Newberry Library.

NOTES

1. Sally Gardner Reed, *Library Volunteers—Worth the Effort!: A Program Manager's Guide* (Jefferson, N.C.; London: McFarland & Co., 1994), 2.
2. Audrey Bateman Randle, "Volunteers and Friends: Recruitment, Management, and Satisfaction," in *Advocating Archives: An Introduction to Public Relations for Archivists*, edited by Elsie Freeman Finch (Metuchen, N.J.: SAA and Scarecrow Press, 1994), 83.
3. The author wishes to express her gratitude to the ARC archivists who participated in this survey and shared their experiences with volunteer use.
4. Susan J. Ellis, *From the Top Down: The Executive's Role in Volunteer Program Success* (Philadelphia, Penn.: Energize Associates, 1986), 23.
5. Judith Ellis, ed. *Keeping Archives* (Port Melbourne, Australia: D.W. Thorpe and the Australian Society of Archivists, 1993), 342.

6. These volunteer duties have been used by ARC archivists. This list also closely resembles those given in Ellis, 343 and Enid Thompson, *Local History Collections: A Manual for Librarians*. (Nashville, Tenn.: American Association of State and Local History, 1978), 66.
7. Responses from ARC archivists included: increasing goodwill; useful contact in community; presentations to other groups; improved relations with the community; tell others about their experience and about using the archives; and word –of mouth.
8. Reed, 19–21.
9. Reed, 21–24 and Ellis, 6–7.
10. Randle, 84.
11. Randle, 84.
12. Reed, 10.
13. Hebert S. White, "The Double-Edged Sword of Library Volunteerism," *Library Journal* (April 15, 1993), 67.
14. Ellis, 23.
15. Joan Wolfe, *Making Things Happen: How to Be an Effective Volunteer* (Washington, D.C.: Island Press, 1991), 139.
16. David W. Carmicheal, *Involving Volunteers in Archives*, Technical Leaflet Series, No. 6 (Mid-Atlantic Regional Archives Conference, 1990), 1.
17. Steve McCurley and Rick Lynch, *Essential Volunteer Management*, Volunteer Management Series (Downers Grove, Ill.: VMSystems and Heritage Arts Publishing, 1989), 11.
18. Carmicheal, 1.
19. Reed, 7.
20. *Ibid.*, 7.
21. *Ibid.*, 64.
22. Randle, 85.
23. Ellis, 14–17 and Randle, 84.
24. Ann E. Pederson and Gail Farr Casterline, *Archives and Manuscripts: Public Programs* (Chicago: Society of American Archivists, 1982), 53.
25. Ellis, 11–12.
26. Carmicheal, 2.
27. Thompson, 66.
28. *Ibid.*, 1.
29. McCurley, 22–23.
30. Randle, 85 and Reed, 62–3.
31. Marlene Wilson, *The Effective Management of Volunteer Programs* (Boulder, Colo.: Volunteer Management Associates, 1976), 15–16.
32. Reed, 12, 64.
33. Randle, 87.
34. See Reed, 28–39, for a detailed discussion of possible sources of volunteers and the pros and cons of each group.
35. Wolfe, 24–26.
36. Carmicheal, 3–5 and Reed, 36.
37. Faye Phillips, *Local History Collections in Libraries* (Englewood, Colo.: Libraries Unlimited, 1995), 113.
38. Wolfe, 22.
39. Tim Ericson, "Anniversaries: A Framework for Planning Public Programs," in *Advocating Archives: An Introduction to Public Relations for Archivists*, edited by Elsie Freeman Finch (Metuchen, N.J.: Scarecrow Press, 1994), 72.
40. Carmicheal, 6.
41. Ellis, 343.
42. For more extensive discussions of applications and interviews, see Reed, 40–47 and McCurley, 60–67.
43. Reed, 40.
44. Thompson, 66.
45. Phyllis J. Meltzer, "Help Them Help You," *Museum News*. 66 (March/April 1989), 60–62.
46. Emily Kittle Morrison, *Working with Volunteers: Skills for leadership* (Tucson, Ariz.: Fisher Books, 1988), 18–19 and Randle, 89–91.
47. Reed, 53–57.

48. Ibid, 54.
49. Randle, 92–93 and Reed, 70–72.
50. Morrison, 197.
51. For an interesting discussion of these problems with examples of the problem and possible solutions, see Reed, 76–96. Reed sums up the demands of being a volunteer manager by saying that “perhaps most important of all for the successful management of volunteers is a sense of both humor and perspective.” (96)
52. James H. Conrad, *Developing Local History Programs in Community Libraries*. (Chicago: American Library Association, 1989), 33.
53. Carmicheal, 13–14.
54. Carmicheal, 14 and Randle, 92.
55. Reed, 1.

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