

VOLUNTEER PROGRAM ASSESSMENT FORM

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This questionnaire asks you to make a detailed, systematic assessment of your historical organization's use of volunteers.

It begins with an inventory of your current activities using volunteers. Then the questionnaire asks you to assess your strengths and weaknesses.

The questions are divided into sections that reflect current thinking about "best practices" for volunteer programs.

Remember: THERE ARE NO RIGHT OR WRONG ANSWERS. Please take the time to fill it out completely.

NOTE: This assessment focuses on the day-to-day work with volunteers in your organization. It does **not** focus on the work of your board of trustees except insofar as their policies and activities affect use of volunteers for the hands-on work in your organization. Also, in many small organizations, board members are also hands-on volunteers.

I. WORK

I.A. Summary of volunteering for the past year

I.A.1. How many volunteers have you used in the past year? (Estimate if necessary.)

I.A.2. How many hours in total did your volunteers provide? (Estimate if necessary.)

I.A.3. As a percentage, estimate the age ranges of your current volunteers and the percentages of men and women.

Cohort	% by age	% Girls/women	% Boys/men
Kids (8 - 12)			
Teens (13-18)			
College/Youth (19-24)			
Young Adult (25-35)			
Adult (36 - 64)			
Seniors (65 and older)			

I.B. What volunteers do for your organization.

Briefly describe (phrases will suffice) what volunteers do in each of the areas in your organization. Then estimate what percent of the total of work in this role is completed by these volunteers.

Example: "Historic house or buildings" – tour guide, 35%. The percentage means that about one-third of your historic house/building tours are led by volunteers.

I.B-1. ***Administrative work*** (other than board of trustees).

Per cent by volunteers:

I.B.2. ***Routine office work***

Per cent by volunteers:

I.B.3. ***Museum collections/curatorial***

Per cent by volunteers:

I.B.4. ***Archival collection/library***

Per cent by volunteers:

I.B.5. Exhibitions

Per cent by volunteers:

I.B.6. Historic house or buildings

Per cent by volunteers:

I.B.7. School programs

Per cent by volunteers:

I.B.8. Adult programs

Per cent by volunteers:

I.B.9. Buildings and grounds/maintenance

Per cent by volunteers.

I.B.10. Special events (large-scale activities that often focus on out-of-doors)

Per cent by volunteers:

I.B.11. Social media/website

Per cent by volunteers:

I.B.12. "Friends" or volunteer-run fundraising unitI.B.13. **Other activities** (please specify)

Per cent by volunteers:

I.C. Short-term volunteers.

I.C.1. Do you have opportunities for short-term volunteers? YES NO

I.C.2. If you answered yes to I.C.1, please describe these briefly.

I.D. Hours of work.

I.D.1. When do you volunteers do their work? Check all that apply.

During our regular business hours	
During hours when we are closed to the public	
Evening hours	
Holidays	

I.D.2. Do any of your volunteers work from home? YES NO

I.D.3. If you answered yes, what tasks do they perform from home?

I.E. Physical facility

I.E.1. Where does volunteer work take place in your facility?

I.E.2. Do you have designated spaces for volunteer workers? YES NO

I.E.3. Do you have to set up and put away the work every time they come? YES NO

I.E.4. Do you have a lounge or other space where volunteers can store their personal gear and relax when they are off duty? YES NO

I.E.5. Are any of your volunteer workspaces inaccessible to volunteers who have mobility challenges? YES NO

I.E.6. Are there areas where volunteers work that require special clearance (security, etc.)? YES NO

I.E.7. Do you have free/available volunteer parking? YES NO

I.E.8. Do you have public transportation access to your site? YES NO

II. STAFF-VOLUNTEER RELATIONS

II.A. Coordination.

II.A.1. Who is responsible for organizing and implementing the work of your volunteers?

II.A.2. Is this person a paid staff member or a volunteer?

II.A.3. How many hours a week does he or she work?

II.B. Relationship of volunteers to staff.

II.B.1. If you have paid staff, do volunteers ever participate in staff meetings with them?

II.B.2. If you have paid staff, which staff members work closely with volunteers?

II.B.3. Do you have staff who do NOT want to supervise volunteers? YES NO

II.B.4. Are there tasks that you or other staff members feel should not be performed by volunteers? YES NO

II.B.5. If you answered yes to II.B.4, describe these tasks briefly.

II.B.6. Are your volunteers a repository of institutional memory that is not recorded elsewhere? YES NO

II.C. Volunteers and the board of trustees

II.C.1. Is your volunteer program represented on the board of trustees? YES NO

II.C.2. If it is represented, please explain how.

II.C.3. Does the board receive regular reports on the work of volunteers? YES NO

III. RUNNING YOUR VOLUNTEER PROGRAM

III.A. Mission, goals and funding.

III.A.1. Does your volunteer program have its own mission statement or set of defined goals? YES NO

III. A.2. If you answered yes to A1, please share the mission statement or goals for your volunteer program.

III.A. 3. Do you have funding to support volunteer activities? YES NO

III.A.4. If you answered yes to III.A.3, is it part of the annual budget?
 YES NO

III.A.5. Do your volunteers contribute cash or supplies for their work? YES NO

III.A.6. Do volunteers get reimbursed for out-of-pocket expenses? YES NO

III.B. Planning for volunteer positions.

III.B.1. Do you have a process to determine your volunteer work needs? YES NO

III.B.2. If you answered other to B1, provide a brief explanation.

III.B.3. Do you have written job descriptions for volunteer positions? YES NO

III.B.4. Are volunteers placed in or assigned defined positions (for example, as “tour guides” or “curatorial volunteers”)? YES NO

III.C. Recruitment

III.C.1. How does your organization get new volunteers? Check all that apply.

Announcement in newsletter or local paper	
Word-of-mouth	
Walk-ins	
Relationships with community organizations (Scouts, Rotary, etc.)	
Contact with local high schools	
Contact with local colleges	
Internet/website	
Social media	
Other	

III.C.2. If you checked “other,” please explain.

III.C.3. Which of these sources is most successful?

III.C.4. Do you have any community partners (scout troops, fraternal orders, etc.) who regularly provide volunteers? YES NO

III.C.5. If you answered yes to C4, who are they?

III.C.6. Do you recruit for specific positions? YES NO

III.C.7. Do you feel that your recruitment efforts are reaching the people you want to reach? YES NO

III.D. Enrollment

III.D.1. Do potential volunteers have to fill out an application form? YES NO

III.D.2. If you answered no to III.D1., why not?

III.D.3. Do you have a screening procedure for volunteer applicants? YES NO

III.D.4. If you answered no to III.D.3, why not?

III.D.5. What do you do when you determine that a potential volunteer WILL NOT fit into your organization well? Check all that apply.

It never happens.	
Inform him that we unable to make use of his services personally.	
Send her a letter thanking her for her interest and declining her help.	
Keep the application form for future reference.	
Other	

III.D.6. If you checked "other" in III.D.5, please explain.

III.E. Recordkeeping and reporting

III.E.1. Are volunteers required to be members of your organization? YES NO

III.E.2. Do you keep records of individual volunteer hours? YES NO

III.E.3. If you replied “yes” to III.E.2, who keeps the records associated with your volunteer programs?

III.E.4. Is there an annual report on the volunteer program? YES NO

III.E.5. Do you prepare a statistical analysis of volunteer hours? YES NO

III.F. Training, supervision and policies

III.F.1. Do you have written job descriptions for volunteer positions? YES NO

III.F.2. If you answered yes to III.F.1, when were they last updated?

III.F.3. Do you have a volunteer manual with policies and procedures? YES NO

III.F.4. If you answered yes to III.F.3, when was this last updated?

III.F.5. If you have a manual, do volunteers receive their own copy? YES NO

III.F.6. What kind of orientation and training do you provide for your new volunteers? Check all that apply.

Large group orientation	
Formal training associated with specific tasks (example, guiding)	
Homework assignments and reading	
Training "on the job"	
Periodic "refresher" training when new information is available	
Online training (website)	
Other	

III.F.7. If you checked "other" in III.F.6, please explain.

III.F.8. Do you volunteers receive training on museum ethical standards and potential conflicts of interest? YES NO

III.F.9. Do your volunteers have opportunities to take further training or attend other enrichment activities. YES NO

III.F.10. If you answered yes to item III.F.9, please check all that apply.

Field trips to other sites or museums like ours	
Lectures	
Reading groups	
Workshops on professional practices	
Museum or historic site annual meetings	
Other	

III.F.11. If you checked "other" in item III.F.10, please explain.

III.G. Youth volunteers.

III.G.1. Does your organization presently engage youth volunteers? YES NO

III.G.2. If you answered yes to III.G.1, how many?

III.G.3. If you have youth volunteers, check the places they come from.

Public schools	
Private schools	
Church youth groups	
Boy or Girl Scouts or similar groups	
Home-school kids	
Other	

III.G.4. If you checked "other," please explain.

III.G.5. If you don't have youth volunteers, why not?

III.G.6. If you have youth volunteers, what tasks do they typically perform for your museum/site? Check all that apply.

Front desk/greeting guests	
Guiding	
Clean-up or maintenance	
School programs	
Summer camps	
Helping at special events	
Other	

III.G.7. If you checked "other," please describe what they do.

III.G.8. What do you feel are the benefits of youth volunteers for your organization?

III.G.9. If you experience any challenges working with youth volunteers, what are they?

III.H. Risk management and insurance

III.H.1. Do you have insurance coverage for volunteers?

III.H.2. Do you ask volunteers to sign a waiver relating to potential injuries received on your site?

III.H.3. Do you do background checks on any of your volunteers (for example, school-program volunteers)? YES NO

III.H.4. If you answered yes to III.H.3, who pays for these?

III.H.5. Have you ever had a volunteer sue your organization? YES NO

IV. Evaluating and retaining volunteers**IV.A. Evaluation.**

IV.A.1. Do you evaluate your volunteers? YES NO

IV.A.2. If you answered yes, how often does this take place?

IV.A.3. If you evaluate your volunteers even occasionally, what are the features of this process?

Formal interview with paper evaluation form	
Formal interview with no paper form	
Informal feedback session	
Other	

IV.A.4. If you checked "other," please describe what else you do to evaluate volunteers.

IV.A.5. What do you do if you determine that a volunteer is not working out in his or her position? Check all that apply.

It never happens.	
Hold my breath and hope that he or she will quit.	
Meet with the volunteer to discuss the problem one-on-one.	
Offer the volunteer another assignment.	
Thank the volunteer for his service and ask him to resign.	
Keep a paper trail of the problem and how we resolved it.	
Other	

IV.A.6. If you checked "other," please explain what else you do when a volunteer is not working out.

IV.B. Retention

IV.B.1. What percentage of your volunteers have been at your site for

Less than 1 year	
1 - 2 years	
3 - 5 years	
6 - 10 years	
11 - 15 years	
More than 15 years	

IV.B.2. What do you think is the average for your site?

IV.B.3. Do you have a "hard core" of regular volunteers? YES NO

IV.B.4. Do you use longtime volunteers to mentor/help new volunteers? YES NO

IV.B.5. Do you lose many new volunteers early? YES NO

IV.B.6. Do you ask volunteers who have left for their reasons? YES NO

IV.B.7. If you answered yes to IV.B.6, what reasons do they give? Check all that apply.

A shortage of time for volunteering	
Changing personal priorities	
A loss of interest in the organization	
Feelings that they are not contributing meaningful work	
Feeling that they are not receiving recognition for their work	
Dislike the work you ask them to do	
Dislike staff members	
Dislike other volunteers	
Other	

IV.B.8. If you checked "other" above, please explain.

IV.C. Recognition and appreciation

IV.C.1. Do you recognize your volunteers for their work formally? YES NO

IV.C.2. If you answered yes to IV.C.1, check all that apply.

Volunteer appreciation events	
Certificate of recognition or other award	
Article in local newspaper	
Article in newsletter	
Other	

IV.C. 3. If you answered "other" to IV.C.2, please explain.

IV.D. Feedback from volunteers

IV.D.1. How do your volunteers share complaints, ideas, or other thoughts about your organization? Check all that apply.

Gossip/volunteer grapevine	
Informally with their supervisor	
Formal feedback form	
Volunteer meetings	
Other	

IV.D.2. If you checked “other,” please describe.

IV.D.3. How do you handle complaints from volunteers? Check all that apply.

Let it blow over.	
One-on-one conversation with volunteer.	
Conversation with volunteer, supervisor and volunteer coordinator.	
Discussion at volunteer meetings.	
Other	

IV.D.4. If you checked “other,” please describe.

IV.E. Problems with volunteers

IV.E.1. Do you have a procedure for letting problem volunteers go? YES NO

IV.E.2. Do you ever “wash out” potential volunteers during the application process or volunteer training? YES NO

IV.E.3. Has a volunteer ever complained about you or your organization in a public setting? YES NO

IV.E.4. If you answered “yes” to IV.E.3, describe how you handled this situation.

V. CONCLUDING THOUGHTS ABOUT YOUR PROGRAM

V.A. Overall characterization.

V.A.1. How would you best characterize your use of volunteers? Check one.

Fully functional. Our program is strong and meets our needs. Policies and procedures are in place to help us manage volunteers and the work we need to get done is mostly getting done.

Functional. Our program is solid. Policies and procedures are in place but we could use help in specific areas such as recruitment or retention.

Sub-functional. Although we have success in some areas, we are struggling. We use volunteers but we do not have a fully organized volunteer program. We do not have enough volunteers to do the work we need to get done.

Does not function well. We are not able to meet our volunteer needs with our current set-up. We need to start/revamp our program.

V.B. Strengths

V.B.1. What are your volunteer program's particular strengths? (Be honest – give yourself a pat on the back where it's due!)

V.B.2. How do you define success in your volunteer program at present?

V. C. Weaknesses and constraints.

V.C.1. Write a paragraph or two making an honest assessment of your constraints and challenges when using volunteers.

V.C.2. What are your greatest challenges?

WHAT DO YOU WANT THE FUTURE TO LOOK LIKE?

Now that you have completed the assessment and shared your final thoughts, please share your vision of what the ideal volunteer program for your organization would be like.