



Volunteering In Independent Museums

A Research Study

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Executive Summary

- 1 Most independent museums are grounded in volunteer effort, and for many volunteering is their very life-blood. Although there is a comprehensive literature about the process of organising volunteers in museums and their management, relatively little has been written about the broader strategic issues that will influence volunteering in independent museums during years to come.
- 2 The current position is, generally, one of strength. The total number of volunteers in independent museums – both regular and infrequent – is over 100,000 people, of whom perhaps around 20,000 commit themselves to working frequently. The value of this voluntary support is around £108 million each year – the equivalent of around 25% of the total incoming resources to independent museums in 2007 (though for the smallest museums volunteering contributes a far larger proportion of their resources). Turnover in these volunteers is modest, and those museums that are fully involved with their communities appear to have little difficulty in recruiting sufficient new people to maintain their current operations.
- 3 The study suggests that:
 - to operate even the smallest, seasonal volunteer-run museum on a sustainable basis requires around 5,000 volunteer hours each year, provided by a minimum of around 40 volunteers;
 - on average volunteers tend to work an average of around a half day per week, though the range extends from people who are almost full-time workers to other whose voluntary commitment may be limited to once or twice a year;
 - volunteers in museums with the smallest number of volunteers (whether or not employees are in the majority) tend to contribute the most hours;
 - in smaller independent museums that employ staff, the working time provided by volunteers exceeds that of the museum's employees;
 - volunteers in urban independent museums appear to do about 44% more hours than their rural counterparts (though other studies suggest that volunteers in rural areas have more volunteer commitments, so that the overall time spent in volunteer activity is similar).
- 4 Museum volunteering tends to be organised around of the four models:

- *resources*, which sees volunteers solely in terms of their contribution to maintaining or adding value to the Museum's operations;
 - '*leisure*', where volunteering provides a leisure activity, especially for older people;
 - '*social service*', where volunteering is a means of doing social good; and
 - as a '*relationship*', the nature of which includes volunteering as but one element within a basket of activities by which an individual supports the museum's mission.
- 5 While all volunteering includes all four of these factors to a greater or lesser extent, which model predominates has a substantial impact on the nature of volunteering and how it is managed. In particular, the relationship model has implications for those museums that have free-standing Friends organisations, which have the potential to dilute the strength of the relationship.
- 6 Yet relatively few museums consider volunteer recruitment and retention as part of their business planning, and the general impression is that museums are either complacent and believe that their current arrangements are capable of continuing indefinitely, or believe that this vital part of their future is out of their control. Those museums that say 'we can't find volunteers' usually really mean 'we can't find volunteers like us'.
- 7 During recent years, the voluntary and community sector has achieved an increased profile in government policy, and especially in connection with its potential role in delivering public policy. Museums will need to be aware of the broad policy context, both to identify the opportunities that will rise and how to recognise the challenges that a more substantial Third Sector will bring.
- 8 Taking positive action on these matters is important in a world where economic and demographic changes will have an increasing impact, old certainties appear less secure, the competition for volunteers will be greater, and the needs and motivations of potential volunteers will differ to those of today. It will hard for a museum to attract a new generation of volunteers if its offer remains unchanged.
- 9 Demographics suggest that the independent museums sector is starting to go through a period of generational change, with the departure of their founders, who are being replaced by the 'baby-boomers', and then by Generations 'X' & 'Y'. Each of these generations has different characteristics to that which precedes it, and needs to be reflected in changes to museum working practices and the terms of volunteer engagement.

- 10 To address these issues independent museums need to better understand:
- the size, scale and the contribution made by their volunteers, which should be reported through trustees' annual reports, both as an indicator of public benefit and to provide a rounded picture of the museum's operation to the outside world;
 - the levels and types of volunteer contribution needed to sustain the museum in the longer term, which should be reflected in forward plans;
 - the composition and demographics of the volunteers who support them; and
 - the changes that they will need to make to encourage the introduction of new generations of volunteers.

1 Introduction

- 101 Since 1984 – and 2009 marks the twenty-fifth anniversary of the publication of Jenny Mattingly’s seminal report¹ on museum volunteering in the UK - barely a year seems to have passed without an official report, research study or funding initiative aimed at developing volunteering in museums. As an area of interest, it has also proved to be fertile ground for museum studies students in search of a dissertation topic, and become a staple of museum training programmes. At the time of writing publication of two major studies on museum volunteering – in Scotland and the East Midlands region of England² – are imminently expected.
- 102 As a consequence, the volume of published literature and other endeavour on volunteers and their management in museums is substantial. Additionally, generic information produced by Volunteering England (and its counterparts in the other Home Nations) and other bodies provides first-rate practical guidance that is applicable to museums as much as to any other organisation. Central government and independent research are both applying substantial effort to mapping and quantifying the activity in and impact of volunteering in general.
- 103 Yet notwithstanding this high level of activity, were museums to undertake a sector-wide risk assessment, volunteer recruitment and retention might be expected to be towards the top of the list. While many museums can relate very easily to the needs and expectations of their current volunteers, whether as individuals or collectively, they find it far hard to think about volunteer issues as part of their strategic planning. Thus most museums – even the smallest – have become increasingly adept at business planning, but their risk analyses often fail to take into account the potential impact of changes in the contribution made by their volunteers.
- 104 Thus rather than explore generic issues, which are usefully summarised elsewhere³, this report explores some of the strategic factors which independent museums will need to address in the coming years. Though some apply to museum volunteering in any type of organisation, the aim has been to focus on those that are specific to independent museums⁴.

¹ Mattingly, J *Volunteers in Museums and Galleries* (1984) Berkhamsted, The Volunteer Centre

² for Museums & Galleries Scotland and the East Midlands Renaissance Hub respectively

³ Baring Foundation *Volunteers in Museums: Key Findings and Issues from the Literature* (2005)
<http://www.baringfoundation.org.uk/litreview.pdf>

⁴ For the purpose of this report the term 'independent museum' is taken to mean any museum or art gallery that holds collections and which is not directly controlled by, or the direct responsibility of, any central government Department or local or regional authority. This definition excludes those that are constituted by Public Act of Parliament or Royal Charter - the 'National museums'. A description of the constituency's morphology is in our report for AIM on *Local Authorities and Independent Museums* (2007)

- 105 This research is essentially a desk study, though informed by conversations with practitioners in the museums sector. Particular use is made of the *Egeria* database of independent museums, which provides details of income and expenditure for 999 UK independent museums that are also charities, and the annual accounts and financial statements of 525 of those institutions. Details of the methodology associated with the statistical element of the study are described in Appendix A.
- 106 Although this study re-states the importance of volunteers in the operation and development of independent museums, the trustee annual reports of most museums only refer by fulsome acknowledgement of their volunteer workforce and a statement that the museum could not continue to operate without volunteer support. Less than 10% provide any measure of the level of that support, whether quantified in terms of volunteer numbers or, more reliably, the total hours worked. Year-on-year comparatives are invariably absent. Given that volunteer resources are claimed in many cases to be the key to the museum's sustainability, it is hard to see how such reports can provide a comprehensive and rounded picture of their museum's operation.

2 Museum Volunteering Today

Background

- 201 Although volunteering has a long history of appearing in the museum literature⁵, for most of their history the museum workforce – as much in independent as other public museums – has generally been remunerated. It was not until the 1960s that this began to change on any major scale, and the major period of development of museum volunteering began.
- 202 Changing social attitudes and reducing deference to traditional institutions, together with an increase in relative affluence and growth in car ownership, provided a pool of people with the attitude, income and mobility to participate in the conservation of their heritage, which they did by:
- joining existing organisations like the National Trust, which saw its membership increase by almost 300% during the 1970s and double during the 1980s;
 - creating new national organisations such as the National Association of Fine & Decorative Arts Societies, which promoted both volunteering in its member bodies, and provided training to enhance the standards of work carried out by their members;
 - forming local history and amenity societies and civic trusts which provided not only a chance for people with like interests to meet and learn, but also acted as a communal voice for their concerns to local authorities;
 - founding community museums with a focus on social and industrial history, themes that were under-represented in the existing museum structure of local museums that were mainly run by local councils; and
 - creating new organisations to preserve important sites that were being lost as a consequence of economic change, funding them by participation in the burgeoning day-visits sector of the tourist industry.
- 203 Independent museums were in the vanguard of this change. Unrestricted by the encumbrances of tradition, the need to earn more than they spent, or availability of initial funds, they pioneered new approaches. Often their preparedness to experiment was a consequence of their being led by volunteers who had little time for traditional 'professional' practices.

⁵ for example, 'Voluntary Help in Museums' *Museums Journal* 2 (1903), 255 - 257

- 204 Though both National and local authority museums are now more likely to have a stronger volunteer input than they did forty years ago, they have continued to be the backbone of most independent museums during the intervening years.
- 205 Indeed, all independent museums that are charities have volunteers - if only their unpaid trustees. In effect there are two types of independent museum:
- those that are volunteer-run, where the whole range of tasks required to operate the museum are carried out by unpaid people drawn from the community of interest that supports the museum (perhaps with one or two employees to support those volunteers); and
 - those where the staffing complement is paid, where volunteers work in support of paid staff – albeit often alongside those employees.
- 206 In the latter group, the experience of independent museum volunteering may not be substantially different from those in their National or local authority counterparts. The volunteer-run independent, however, is likely to be run on a more collective basis, and have a very distinct culture and way of working, even though processes and systems may be shared with larger institutions.

Morphology

How Many?

- 207 There is no census of the number of volunteers working in UK museums. Nonetheless, the Museums & Galleries Commission estimated that, for 1998, there were around 25,000 volunteers⁶ - which it claimed was 20% more than in 1997. Two-thirds of these volunteers were in independent museums, while an additional 19% worked for one of the two National Trusts. Volunteers, it reported, provided around 60% of the UK museums workforce, though they represented 82% of the workforce of independent museums. This assessment was supported by the VisitBritain annual survey of English tourist attractions in 2004,⁷ which suggested that volunteers made up a similar proportion of the museum workforce (63%), and in the national audit of Scottish museums (2002)⁸ which reported that, of the 10,885 people working in Scottish museums, 5,736 (52%) were volunteers, of which 86% worked in independent museums.

⁶ Museums & Galleries Commission *Museum Focus 2* (2000) London: Museums & Galleries Commission Table 1.19

⁷ VisitBritain *Survey of Visits to Visitor Attractions England 2004* London: VisitBritain (2005)

⁸ Scottish Museums Council *A Collective Insight. Scotland's National Audit (2002)* Edinburgh: Scottish Museums Council

- 208 The *Taking Part* survey undertaken by the Office for National Statistics for the Department of Culture, Media & Sport (DCMS) is a continuous survey of cultural activity amongst adults in England. It has been running since July 2005, collecting data by means of face-to-face interviews from around 29,000 adults, aged 16 or above. The 2005/6 Taking Part study⁹ reports that 3 per cent of all adults in England volunteered in the cultural sector during the previous twelve months, of which 10 per cent (or 0.3% of the adult population) volunteered in museums/galleries - around 120,000 people. This represents a substantially higher figure than most of the earlier estimates, though are in the same order as those reported in a British Association of Friends of Museum survey published in 1997.¹⁰
- 209 Exhibit 1 summarises the results of an *Egeria* survey carried out specifically for this report on museums in England and Wales. Although the sample size requires the application of large confidence intervals¹¹, the range is sufficiently distributed, if not to provide precise figures, to reflect relativities:

Exhibit 1: Volunteering in Independent Museums in England & Wales

| Category | Ave | Top Quartile | Median | Bottom Quartile | Base |
|------------------------------|--------|--------------|--------|-----------------|------|
| <i>Per Museum</i> | | | | | |
| Number of volunteers | 109 | 300 | 82 | 39 | 47 |
| Total Volunteer hours pa | 12,937 | 20,000 | 11,509 | 5,000 | 30 |
| Volunteers FTE equivalent | 7.8 | 18 | 7 | 4 | 30 |
| Ratio of staff to volunteers | 1:4 | 1:19 | 1:8 | 1:2 | 40 |
| <i>Per Volunteer</i> | | | | | |
| Hours per volunteer | 98 | 350 | 100 | 58 | 12 |
| | | | | | |

Source: *Egeria Independent Museums Database*

- 210 Although the largest part of the sample relates to museums with employees (as those which are most likely to quantify the extent of volunteer involvement) the ten museums in the sample without paid staff all seem to approximate to the bottom quartile in each of the first four categories.
- 211 These figures reflect a range of different circumstances, and are in no way benchmarks (though similarities with other published figures are noticeable - for example, the contribution of an average 60 hours per year by individual

⁹ DCMS *Taking Part: The National Survey of Culture, Leisure & Sport Annual Report 2005/6* (2008), London: Department for Culture, Media & Sport, 37

¹⁰ Chambers, D (1997) British Association of Friends of Museums. *Survey of Heritage Volunteer Training: Further Analysis* London: Institute for Volunteering Research

¹¹ see Appendix A

volunteers to the National Trust¹² is comparable to the lower quartile of this study). These and other results from the study suggest the following:

- to operate even the smallest, seasonal volunteer-run museum requires around 5,000 volunteer hours each year, provided by around 40 volunteers;
- volunteers tend to work an average of around a half day per week, though the range extends from people who are almost full-time workers to other whose voluntary commitment may be limited to once or twice a year;
- volunteers in museums with the smallest volunteer teams (including those where paid staff are in the majority) tend to contribute the most hours;
- in smaller independent museums that employ staff, the working time provided by volunteers exceeds that of the museum's employees; and
- volunteers in urban independent museums appear to do about 44% more hours than their rural counterparts (though other studies suggest that volunteers in rural areas have more volunteer commitments, so that the overall time spent in volunteer activity may be similar).

212 The figures for the contribution made by volunteers contrasts sharply with previous estimates, and particularly those published by the Institute for Volunteering Research in studies in 2001¹³ and 2005 study,¹⁴ which proposed that, on average, museums in England received an average total contribution of 71 hours per week (3,692 hours per year) in 2001, which rose to 81 hours (4,264 pa) in 2006. The *Egeria* study suggests that the average figure for independent museums is three times that figure.

213 Applying the average across all independent museums would suggest that there are around 107,000 museum volunteers in the UK (slightly under two people per thousand population), of which approximately 94,000 would be in England and Wales. These are substantially higher figures than earlier estimates, though in line with independent museums share that might be represented in the more recent *Taking Part* results referred to above¹⁵. Rather than evidence of an explosion in museum volunteering, the difference probably lies in the how volunteering is perceived by respondents to the different surveys. The figures contributed by museums refer only to the frequent and committed volunteer; *Taking Part* captures the irregular

¹² 52,000 volunteers working 3,093,771 hours reported in the Trust's *Annual Report 2007/8*, 26 – approximately 60 hours per volunteer per year

¹³ Institute for Volunteering Research *Volunteers in the Cultural Sector* (2002) London: Resource

¹⁴ Institute for Volunteering Research *Volunteering in Museums, Libraries & Archives* (2005) London: MLA

¹⁵ para 208

volunteer often working outside of the museum structure (eg selling raffle tickets).

- 214 Thus most of the studies that produced smaller estimates appear to have been based on a definition of the term 'museum volunteer' that limits it to someone who works from their own choice, without pay or other financial gain, on a regular basis, for an organisation that is a charity or other form of public organisation. This excludes:
- a wide range of 'supporter' activities of the types undertaken by Museum Friends in fundraising or promoting which happen less frequently (perhaps only once a year); and
 - activities where participation is not a positive choice of the participant such as in:
 - placements, (often by schools or colleges) to enable people to gain work experience;
 - third-party involvement, where another organisation provides volunteers to undertake a specific, time-limited task; and
 - corporate volunteering, where businesses organise groups of employees to work on community projects either in work or their own time, to develop team building skills so as to strengthen group performance at work.
- 215 As one museum described their support – *'we have a membership of around 90 of which there is a core group of 17, and most weekends there are typically about 8 people'*.¹⁶ This 1:6 ratio of regular, active volunteers to the total roll of volunteer supporters may not be untypical of smaller museums. The breadth of participation, from a few hours annually to a regular commitment that almost constitutes full-time work, provides a huge range of opportunities for museums, while at the same time presents the extra challenge of managing a diverse portfolio of mutually-supporting relationships. It also suggests that approaches to volunteering recruitment and retention need to reflect this diversity, rather than a 'one-size-fits-all' process.
- 216 In some circumstances the difference between regular and occasional volunteers is formalised in Friends' organisations. In these circumstances the regular volunteers (though they may also be Friends) are unpaid workers, while those who participate less frequently do so solely through the medium of their Friends membership.

¹⁶ Suffolk College *Heritage Volunteer Education & Training Project Report* (2000) Ipswich: Suffolk College, 11

217 Such an arrangement poses real challenges for the future. Those museums that take the view that there are real opportunities in creating long-term (even lifetime) relationships with people - as visitors, donors (of collections and money), volunteers and advocates - might want to bring these relationships within a single structure and position them within organisational silos. They may find that intermediary self-governing organisation such as Friends could dilute the relationship they are trying to create, so may be unhelpful. In these cases consideration is likely to be given to absorbing separate Friends' organisations within the museum charity, to achieve the following benefits:

- clarity in fundraising, with only one destination for funds;
- administrative efficiency by precluding duplication in fundraising administration (eg Gift Aid) and reducing meetings;
- avoidance of the risk of the Friends and the museum moving in different strategic directions;
- greater flexibility for constructing relationships specific to different audiences.

What Is The Value of Volunteer Support?

218 Grossing of the *Egeria* study suggests that volunteers contribute in the region of 10.5 million hours to independent museums in England and Wales, or the equivalent of approximately 6,470 Full Time Employees (FTEs). Quantified on an average hourly rate of £10.30 (the average hourly rate for museum workers in the 2007 UK Employment Survey), this equates to a notional financial contribution of around £108 million, which is the equivalent of around 25% of total incoming resources to independent museums in England and Wales¹⁷.

Who Volunteers?

219 Research¹⁸ points to the stereotypical museum volunteer as being of late middle-age or retired, well-educated and from higher socio-economic groups, with a slightly-higher likelihood of being female than male. These are also characteristics of volunteers in the cultural sector in general¹⁹. While in

¹⁷ The *Egeria* database report gross income for independent museums, based on Charity Commission annual returns, as £305.668 million in 2006

¹⁸ Baring Foundation *Volunteers in Museums: Key Findings and Issues from the Literature* (2005), 3 -5 <http://www.baringfoundation.org.uk/litreview.pdf>

¹⁹ Department for Culture Media & Sport *Taking Part: The National Survey of Culture, Leisure & Sport Annual Report 2005/6* (2008) London: Department of Culture, Media & Sport

society at large volunteering is equally spread across all groups²⁰, unsurprisingly, the characteristics of those people who volunteer in museums is representative of those people who are most likely to visit.

- 220 Exhibit 2a shows participation in volunteering by proportion of the population of England in all areas of activity (from the government's *Helping Out* study) and in cultural activities (from the *Taking Part* study) in each of the age groups. Exhibit 2b shows the proportions of the total museum volunteer workforce in each of age group:

Exhibit 2a: Volunteering in the UK

| | <i>All Volunteering</i> | <i>Cultural Volunteering</i> |
|-------|-------------------------|------------------------------|
| 16-24 | 67 | 25 |
| 25-34 | 57 | 18 |
| 34-44 | 64 | 24 |
| 45-54 | 58 | 24 |
| 55-64 | 64 | 28 |
| 65+ | 58 | 49 |

Sources: Office of Third Sector (*Helping Out*) & DCMS (*Taking Part*)

Exhibit 2b: Museum Volunteers by Age 2001 & 2005

| | <i>2001</i> | <i>2005</i> |
|-------|-------------|-------------|
| 16-24 | 13 | 8 |
| 25-34 | 6 | 5 |
| 34-44 | 6 | 5 |
| 45-54 | 11 | 10 |
| 55-64 | 27 | 28 |
| 65+ | 36 | 25 |

Source: Institute for Volunteering Research (2007)

- 221 This suggests the following:
- that volunteering in general is broadly-based across the population; all groups volunteer, and stereotypes about volunteering are wrong, so that every individual, regardless of gender, race, religion, creed, or background has the potential to be engaged when the activity matters to him or her;

²⁰ Cabinet Office (Office Of The Third Sector) *Helping Out: A National Survey of Volunteering & Charitable Giving* (2007) London: Cabinet Office

- 225 Both under-representation of younger people and motivations may have their root in the generational structure of museums, which is discussed further in Chapter 3.

Can Volunteers Substitute for Paid Staff?

- 226 Politicos and other opinion-formers sometimes have the notion that financial difficulties can be addressed by replacing paid staff with unpaid volunteers. Counter-intuitively, successful voluntary bodies create paid jobs rather than replace them, and the larger the number of volunteers, the greater the likelihood that they will create sufficient financial resources, in cash or kind, that require staff to provide continuity or co-ordination.
- 227 In volunteer-run museums front-of-house duties appear to represent the main area of commitment. Independent museums that employ staff often start by remunerating front-of-house staff as a means of avoiding difficulties in securing sufficient volunteers to open the museum during advertised hours. In such situations, employees often become necessary, not because volunteers could not do the job, but because the scale of the work outgrew what part-time volunteers could handle.
- 228 Where paid staff deal with front of house, the volunteer focus tends to shift to behind-the-scenes work such as collections management (especially documentation and conservation) fundraising and research. Ironically, one of the consequences of such a shift from all-volunteer to employing staff is that the ability to react quickly and take risks – the very hallmarks of their founding years – diminishes.

Recruitment and Retention

- 229 The annual reports of most museums (though always keen to increase the number of volunteers) rarely report any immediate concern about an inability to recruit or retain volunteers. Where anxieties are rehearsed, they tend to be about perceptions of future difficulties, rather than reporting an immediate crisis. This reinforces the impression given by an unpublished survey carried out for AIM in 2006²¹ which reported that, overall, 92% of museums had the same number of, or more, volunteers than five years previously.
- 230 However, there are some exceptions to this general rule. For example, the 2006 AIM study suggested it was harder to recruit museum volunteers in Scotland, the South East and Yorkshire than in other parts of the UK. Difficulties also seem to have arisen where:

²¹ undertaken in connection with workshops held for the Esmée Fairbairn Foundations Sustainability Fund

- the museum was founded by a small group of enthusiasts who consistently have failed to introduce new blood, which, over time, has divorced them from the community (whether of place or interest) in which they are located;
 - the founding group was so small that it was only ever able to open the museum for so few hours each week, let alone undertake other activities, so that it appeared marginal to the life of the community, with the consequence it has been unable to motivate people to support it; and
 - the museum has a remote location, yet its operational requirements demand a high number of volunteers on duty during opening hours, when a small number of 'no shows' can create substantial pressures that ultimately lead to internal dissatisfaction and, in some case, health and safety consequences.
- 231 The experience of independent museums tends to follow the grain of the experience of the voluntary sector in general. Irrespective of motivation, around 47% of all volunteers suggest that they started volunteering as a result of a personal invitation or recommendation. Similarly, 37% of non-volunteers said they would be interested in doing so and that a key incentive for doing so would be 'being asked'.²² This suggests that museums that have deep roots in their communities and already engage with a broad section of society are those that have the most recruitment opportunities
- 232 In particular, new volunteers tend to be drawn from people already identified as supporters – members (whether of the Museum or its Friends organisation), their families/friends, and visitors. Other sources of potential support outside the existing client base such as websites, volunteer bureaux, university volunteer schemes, corporate volunteer schemes, and placements by social needs organisations take substantially greater effort to mobilise.
- 233 Much of the literature on volunteering in museums focuses on formal structures and schemes. The sequence in this approach is:
- enquiry (perhaps by completing an application/enquiry from the potential volunteer, whether or not solicited through recruitment materials);
 - an initial conversation to assess the potential volunteer's levels of interest and commitment;

²² Elisha Evans & Joe Saxton *The 21st Century Volunteer* (2005),12 London: nfp-Synergy

- informal interview between the potential volunteer and a museum representative;
- taking up references provided by the potential volunteer;
- participation in an induction process which would include:
 - an introduction to the museum and its operations,
 - health & safety requirements,
 - child and vulnerable adults protection (whether or not the Museum requires its volunteers to have Criminal Record Bureau checks in advance of starting work,
 - customer service and role training; and after all of these;
- start volunteering, initially under closer supervision than will eventually be necessary (some museums adopt a 'buddy system' where a new volunteer is partnered with an experienced counterpart, who is expected to mentor the newcomer through the first months of work).

234 Most museums also retain their volunteers. The 2006 AIM survey saw 86% indicate that their annual turnover of volunteers was below 10%. Most museums appear to ensure that the work continues to be interesting, is acknowledged as useful, and no volunteer becomes bored or frustrated. This is achieved by volunteers being:

- certain of their role, though being provided with a role description, receiving appropriate training after induction, and being adequately supervised;
- kept in touch, for example through briefings, noticeboard, newsletters, or integration with any paid staff;
- able to feel easy about raising any queries, suggestions or complaints, and knowing that the museum will listen and respond to these, so that no issues become areas of conflict; and
- appreciated by the museum, with appropriate (though not excessive) formal and informal acknowledgement by the museum's governing body and staff (if any).

235 Many organisations that recruit volunteers from a wide area provide out-of-pocket expenses and/or refreshments so that no volunteer is out-of-pocket as a result of their support, so that no part of society is discouraged from participating on cost grounds. Some organisations insist on paying expenses, with volunteers not wishing to claim being encouraged to return the sums paid by way of donations, on which the museum can claim Gift Aid!

- 236 While these techniques are appropriate and necessary for the 10% or so of people who are prepared to make a regular and frequent commitment, they may be inappropriate for the occasional supporters who, notwithstanding they participate only infrequently, nonetheless feel they are volunteering for the Museum. Ways of maximising and acknowledging their contribution need also to be considered.

Models of Volunteering Management

- 237 There appear to be four models that underpin attitudes to museum volunteering:
- the '*resources*' model', which sees volunteers only in terms of their contribution to maintaining or adding value to the Museum's operations;
 - the '*leisure*' model, which sees volunteering as providing a leisure activity, which is a principal motivation for volunteering by many older people;
 - the '*social service*' model which sees volunteering as a means of introducing people who may have been excluded or unable to participate in social society to the world of work and living in the community; and
 - the '*relationship model*' that sees volunteering as one element within a basket of activities with which an individual supports the museum's mission by visiting, participating in its activities, being a financial donor and acting as an ambassador/advocate.
- 238 Understanding which of these is/are the museum's main driver(s) can help mitigate the risks associated with each:
- where the resources model coincides with a museum based on paid staff there is a risk that, however good processes and systems, a 'them and us' attitude will exist;
 - volunteers whose motivation is aligned to the leisure model may have a very definite view of what they want to do and will not consider doing, irrespective of their personal skills (eg a retired teacher not wishing to participate in the museum's education programme);
 - the social service model can consume as many (and more) resources than it creates;

- the relationship model is never quickly achieved, and takes time to establish.
- 239 Most independent museums' volunteer schemes will include elements of all of these models, to be exemplified in whichever circumstance is most appropriate. Those that employ staff often seem nearer the resources model, and those that receive public funding may tend towards the social service model; volunteer-run museums often seem founded on the leisure model. Though many museums acknowledge that same people are involved in a range of different ways, the relationship model is found with less frequency.

Training & Development

- 240 Most museums acknowledge the need to train and develop volunteers, though the motivation to participate can sometimes be difficult to capture in individual (and especially long-serving) volunteers. Many museum organisations struggle to put in place mechanisms so that skills acquired from training and development are not only embedded in the current team, but become part of an organisational knowledge bank that is passed on, through practice, to the next cohort of volunteers.
- 241 Some volunteers have become members of the members of the Museums Association, which provides a professional association for museum workers, and have participated in its continuing development programme that leads to becoming an Associate of the Museums Association (AMA). This both recognises the skills they brought into the museum, and encourages the acquisition of new, sector-specific, practical skills, all supported by a mentor who is a museum practitioner.
- 242 While the AMA is not a qualification in the generally-accepted understanding of the term, it does provide a route for personal development. For those museum studies students who are unable to find employment and become museum volunteers to maintain their skills, it also provides a route to demonstrate continuing development and competence to potential employers.
- 243 The difficulty is that most independent museums, while recognising its importance, find it difficult to provide sufficient resources for training and development in general, let alone for the development of individual volunteers. While both AIM and the Museums Association through their Bob Harding and Trevor Walden bursaries enable some to attend appropriate conferences and events, these are valuable add-ons rather than core capacity.
- 244 Until recently funding for that core provision in England has come from Renaissance in the Regions, whether directly through MLA regional offices or regional museum hubs, either as direct provision or through the services and programmes of museum development officers, which has come to substitute

for the support provided in the past by the now-defunct area museum councils. The MLA's recent structural reorganisation has led to what at best is reduced visibility and at worst a hiatus in support for training and development programmes. The situation in Wales and Scotland the situation is somewhat better, with both Museums & Galleries Scotland and CyMAL continuing the tradition of proactive engagement in training and development for independent museums.

3 Volunteers in The 2010s

Context

General Trends

301 The years to come are likely to be substantially different to those experienced since World War 2. The big issues to be faced by the UK include:

- *an ageing population*, with people living longer and having fewer children, with analysts suggesting that by 2023 a larger percentage of the UK population will be over 50 than under;
- *a pensions crisis*, both occupational (people living longer mean that pension pots buy smaller annual incomes) and state (fewer younger people to pay taxes and national insurance to fund pension and other welfare benefits) – this will lead to savings for pensions and other provisions absorbing a larger proportion of household incomes;
- *a growth in 'grey power'* as older people become a larger consumer group in society and, in the case of those benefitting from final salary pension schemes, a relatively prosperous one;
- *changes in family structures*, with decreasing birth rates leading to smaller families which, taken with increases in divorce rates and an increase in single-person households removes the social support inherent in unified families/households and will lead to increased pressure on the 'social service' voluntary sector;
- *an age of austerity* as, for the foreseeable future, governments worldwide seek to stabilise and then recover from the economic downturn; and
- *higher taxation and reducing public expenditure* as the colossal public debt repayments - the consequence of the government's financial intervention to stabilise the UK banking system – are not matched by reduced public expectations of what it expects the government to provide in terms of personal support and social services.

302 For the museum sector these factors are likely to lead to the following:

- reduced public funding for museums (and far-sighted museum directors of publicly-funded museums are probably now beginning to plan on the basis that their 2020 incomes may only be the equivalent of 40% of their 2008 value);

- a growth in the attitude that public services outside of education, health and social services should expect to be mainly paid for by those who use them or believe they should exist;
- increased competition for the public funding that does remain, both for publicly-funded organisations and those that receive no public subsidy;
- a growth in unemployment, as much in skilled and educated people as in the unskilled and semi-skilled, providing opportunities to benefit from the talent pool this will create;
- charitable giving may become focused on a smaller number of priority causes, rather than a more general largesse;
- less disposable household income will mean that admission-charging museums and museum commercial operations will be operating in a more competitive environment, especially for as long as free-admission exists in publicly-funded museums; and
- business is likely to concentrate on shareholder interests and to retreat from financial support for corporate responsibility and non-commercial sponsorship.

303 This is not a 'doom and disaster' scenario, but merely a representation of what can be expected to happen during a downward trend in the economic cycle. Longer-established museums will have been through similar circumstances previously in their history. If what actually happens is worse than the recessions of the last thirty years, it should be noted that museums survived (if not prospered) during the depression of the 1930s. Recent research²³ suggests that:

- charities have a track record of being creative in developing new sources of income, and the impact of the current recession will depend as much on the internal management, decision-making and resources of individual charities as on the external environment – and, as was the case of the British hospitals in the interwar years, survival of the fittest will prevail;
- the proportion of individual income given to charity is likely to remain generally constant – as in the USA during the Great Depression of 1929-1931 – but as unemployment rises, fewer people will be in a position to give anything;

²³ Mohan, J & Wilding K *Economic Downturns and The Voluntary Sector: What Can We Learn From The Historical Evidence* April 2009 <http://www.historyandpolicy.org/papers/policy-paper-85.html>

- some sources of income, such as major gifts, that tend to march in step with the stock market may recover quickly, so the capacity to respond to an upturn needs to be in place;
- the largest charities will not necessarily be best placed to maintain donations and giving may be redirected towards local, community-based organisations, as was the case with local appeals during the 1930s depression in the UK;
- Charity Commission data suggests there have been steady increases in the rate of formation of new charitable organisations, even during recessionary periods; and
- requests for public funding are likely to be met with demands for greater accountability, partnership and rationalisation - during the 1930s, voluntary hospitals' claims of penury were usually met with scepticism by government, while state grants were rare and always tied to reform.

304 The impact on volunteering in museums is likely to be:

- an increased potential to attract younger people who have the 'hard' motivation of enhancing their employability in a competitive jobs market;
- the breakdown in family and household unity brings a potential 'double whammy' of both discouraging volunteering, which is underpinned by ideas of strength in social connection, as well as increasing need for 'social service' volunteering, which will squeeze the Third Sector's capacity and have a negative impact on the time available for cultural and museum volunteering;
- the potential of a larger pool of older people with the time to volunteer will be offset by potential volunteers remaining in the workforce for longer, and therefore having less time to give; and
- pressure on museums to respond to these opportunities within more constricted core capacity.

Public Policy

305 One of the trends of the past ten years has been a consistent strand of government policy (particularly in England) towards encouraging the 'Third Sector' – the voluntary and community sector in play a greater role throughout public life and particularly in delivering public services. Some of the key events during that period have been:

- 2002 – Prime Minister's Strategy Unit publishes *Private Action, Public Benefit*, a review of the law and regulation of charities and other not-for-profit organisations;
 - 2002- HM Treasury publishes *The Role of the Voluntary and Community Sector in Service Delivery*;
 - 2003 – *Futurebuilders* initiative to improve the capacity of the voluntary sector to deliver public services in England launched;
 - 2006 - Office of the Third Sector created as part of the Cabinet Office and published *Partnership in Public Services*, its action plan for Third Sector involvement;
 - 2008 - *Excellence & Fairness: Achieving World Class Public Services* promotes delivery of public services by voluntary and community organisations.
- 306 Following the 2007 Comprehensive Spending Review, the government introduced a new Public Service Agreement (PSA 21) for *Building More Cohesive, Empowered & Active Communities*. One of the means identified of achieving this outcome in England was 'a thriving third sector including wider participation in the design and delivery of local services'. Two of the new national Performance Indicator Set (which replaced the former Best Value Performance Indicators and Performance Assessment Framework) are:
- NI6 – participation in formal volunteering; and
- NI7 – environment for a thriving third sector.
- 307 Local authorities are required to specify which of the 198 Indicators they are treating as a priority. Appendix B reports the top-tier English local authorities, that have identified NI6 and NI7 as priorities, and the net percentage of third sector organisations that believe their council is a positive influence on their work.
- 308 Headline reports for local areas on NI7 are already available ²⁴ as, in the near future, will be the full results for the National Survey of Third Sector Organisations, which will provide valuable advocacy tools for independent museums, especially those allied with other voluntary sector bodies.²⁵

²⁴ <http://www.nstso.com/reports/>

²⁵ For a fuller discussion of the potential of independent museums forming alliances with other charities – especially in the cultural sector – see our *Independent Museums & Local Authorities* (2007) <http://www.aim-museums.co.uk/local-authorities-and-independent-museums.htm>

Baseline figures for current levels of volunteer participation²⁶ have also been published; both NI sets are tabulated by region in Appendix B.

- 309 The Department for Culture, Media & Sport published its own *Third Sector Strategy* in 2009, as have all other government departments.²⁷ Although the Department's portfolio has probably as much voluntary sector engagement as the far-larger Departments of Health or Education, Schools and Families, and more than most departments of state, the Third Sector has always been at its periphery, and it has preferred to focus on local authorities.
- 310 The content of the *Strategy* suggests that the Department's understanding of the Third Sector continues to be limited, and the document is little more than a synthesis of past and present government initiatives that affect the voluntary sector in general. Membership of the Third Sector Advisory Forum it has created is mainly the 'usual suspects' – its non-departmental public bodies – and while it includes the British Association of Friends of Museums, it does not include the largest single representative third sector organisations in the museum sector, the Association of Independent Museums.
- 311 Similar policy importance is placed on voluntary activity in the other Home Nations. In Scotland, a Volunteering Strategy²⁸ aimed to provide a robust foundation for a culture of volunteering which appears to have survived a change of administration. The *Third Dimension*²⁹ is the Welsh Assembly Government's strategic action plan for working with the Third Sector promotes volunteering as an important facet of community life.
- 312 It seems that any incoming government, whether UK or devolved, and whatever its political persuasion, is likely to continue to court the voluntary and community sector, if only driven by the financial imperatives of diminished public sector funding for the foreseeable future, and the consequent need to identify substitutes for its own resources. It is important, therefore, that the voice of the independent museums constituency is heard not only nationally but locally, by creating appropriate local partnerships.

Recruitment & Retention

- 313 There are more potential volunteers in the UK today than ever before. Half of all people in the UK volunteer, formally or informally, at least once a month, and the number of people regularly volunteering in England and Wales rose from 18.4 million in 2001 to 20.4 million in 2005³⁰.

²⁶ as part of the Place Survey developed by the Department for Communities and Local Government which will collect 18 of the 25 National Indicators that are informed by citizens' views and perspectives.

²⁷ DCMS *Third Sector Strategy* 2009

²⁸ Scottish Executive, 2004

²⁹ Welsh Assembly Government January 2008

³⁰ Home Office & Department of Communities & Local Government *Citizenship Survey* (2005)

314 The key motivator for most volunteers remains the acquisition of new skills or friends, contributing existing skills and experiences for the common good, or simply feeling that they've made a difference:

- In 2000 40% of UK citizens indicated that they 'work hard' at self-improvement, a 10% increase since 1980;
- the proportion of people choosing self-fulfilment as their main wish ahead of 'to be highly esteemed', 'to be able to afford something' and 'to have more friendship' has doubled since 1983; and
- 85% of people feel that 'being involved to create a better society' is important/very important.³¹

315 This suggests that any museum that offers people the chance to fulfil their potential has an opportunity to respond to this growing desire for self-fulfilment. When some organisations say 'we can't get people to volunteer' what they often mean is that 'we can't get people like us to volunteer'. As the population ages, there will inevitably be the 'next generation' of museum volunteers. And this coming generation is unlikely to share the characteristics of the people who founded and/or have run the museum for the past thirty years.

316 It is generally recognised that the ethos and attitude of a group of people born and raised in the same era are shaped by the historical experiences they encountered in the period during which they were maturing. Exhibit 5 describes the categories that are generally used to describe generational difference:

Exhibit 5: Generational Classifications

| Generation | Birth Years | Age in 2010 | Population '000 |
|--------------------------------|-------------|-------------|-----------------|
| 'Seniors' | pre-1922 | 88 + | 655.3 |
| 'Traditionalists' | 1922 – 1942 | 68 - 86 | 7,493.8 |
| 'Baby Boomers' | 1943 – 1960 | 50 – 67 | 12,591.3 |
| 'Generation X' | 1961 – 1981 | 29 – 49 | 18,136.5 |
| 'Generation Y' ('Millennials') | 1982 – 2001 | 9 - 28 | 15,795.8 |

Sources: Birth years for the different generations reflect variances from source to source; population estimates - Office of National Statistics

³¹ Elisha Evans & Joe Saxton *The 21st Century Volunteer* (2005), 15 London: nfp-Synergy

317 This suggests that the generations of volunteers who led and created the foundation of today's independent museums, and who have provided the bulk of the volunteer labour force to date (the 'Seniors' and 'Traditionalists') are coming to an age where their level of activity will diminish with increasing rapidity. For the next twenty years or so most volunteers will be 'Baby-Boomers', but within the next two decades it will be to 'Generation X' that society will look with increasing frequency for its volunteers. Moves to attract younger volunteers will require an understanding of 'Generation X' and 'Generation Y'.

318 The rapid pace of economic, social and political change during the past fifty years has meant that the areas of commonality between generations have diminished. Exhibit 6 identifies some keywords that distinguish these generations:

Exhibit 6: Generational Characteristics

| | Traditionalist | Baby Boomer | Generation X | Generation Y |
|------------------------|------------------------------|--|--|--|
| Date of Birth | 1922-1942 | 1943 – 1960 | 1961-1981 | 1982-2001 |
| Age 2010 | 68-88 | 50-67 | 29-49 | 9-28 |
| % Population | 14% | 23% | 33% | 29% |
| Defining Events | Depression WW2 Radio | Welfare State Cold War Atomic Bomb Civil rights Space Race Television | Watergate Glasnost Thatcher AIDS Computers | 9/11 & 7/7 New Labour Iraq Internet |
| Character | Austerity | Optimism | Uncertainty | Globalisation |
| Values | Family | Free Spirits | Informality | Peer-orientation |
| Family | Close family Married once | Dispersed family Divorce/ Re-marriage | Single parent/ 'Blended' families | Loose structure Single parent |

| | Traditionalist | Baby Boomer | Generation X | Generation Y |
|---------------------------------------|--|---|---|---|
| Date of Birth | 1922-1942 | 1943 – 1960 | 1961-1981 | 1982-2001 |
| <i>Economy</i> | Manufacturing | Lifestyle | Services | Knowledge 24/7 |
| <i>Media</i> | Radio, no TV | TV-3 channels | TV-30 + channels VCR Nintendo | TV-100 + channels Net surfing Playstation X Box |
| <i>Technology</i> | Non-digital | Digital aliens | Digital immigrants | Digital natives |
| <i>Education</i> | GCEs | Degree | Degree + postgrad course | Lifelong learning |
| <i>Money</i> | Save | Spend | Hedge | Spend inherited wealth (if any) |
| <i>Career</i> | Loyal to employer Long-term jobs 1 or 2 in career | Self-interest Medium-term 3-6 in career | Loyal to beliefs, not employer Regular change 7 – 12 in career | 'Cause' not money Always changing 13-20 in career |
| <i>Attitudes</i> | Common good Good neighbour | Distrust of institutions | Independent | Fearful |
| <i>Ethos</i> | Conformist | Work = rewards | Pragmatic, perceptive savvy & amoral | Entrepreneurial, goal-orientated. instant gratification |
| <i>Views of Authority</i> | Respect leaders | Challenge leaders | Ignore leaders | Defer to peer group |
| <i>Work relation ships</i> | Master/servant | Consultative | Team working | Mentors, not bosses Equality, transparency and fairness |

| | Traditionalist | Baby Boomer | Generation X | Generation Y |
|----------------------|---------------------------------------|------------------------------|---------------------|--|
| Date of Birth | 1922-1942 | 1943 – 1960 | 1961-1981 | 1982-2001 |
| Concerns | Financial Security Personal status | Lack of clarity in the world | Work-life balance | Global Issues (eg climate change, business conglomeration) |
| | | | | |

Note; Inspired by many sources including Neil Howe & William Strauss: *Millennials Rising: The Next Great Generation* (2000); Lynne C Lancaster & David Stillman: *When Generations Collide* (2002); Giselle Kovary & Buahene Adowa *Recruiting The Four Generations* (Canadian Human Resources Report 23 May 2005)

319 With 'baby-boomers' becoming an increasingly high proportion of the volunteer market, the following generational characteristics need to be borne in mind:

- Higher levels of educational attainment means that there is an expectation of being treated as a 'colleague' than a worker. This environment is often more likely to be found in all-volunteer museums than in museums that are employee-based, where a 'them and us' attitude can sometimes arise, if inadvertently. This collegiate nature is not exclusive to 'white collar' museum work, and it has been shown that it is one of the key factors that encourages volunteering in manual tasks on preserved railways.³²
- Volunteers with practical skills in areas relevant to the museum's operation might expect that that they will be utilised, though some whose motivation is seen as a leisure activity might regard their museum volunteering as an escape from work and the skills they practice there.
- While the majority of day-time volunteering has been undertaken by women, equality in the workplace minimises the time women spend at home and in the community once they have children, which has led to more fathers sharing child-rearing tasks, and therefore becoming available during the day for voluntary work.
- Distrust of hierarchies requires trustees to be more open and accountable if their volunteers are to remain loyal and committed.
- The museum is unlikely to be their sole voluntary interest, and not only will this expose the museum to the experience of volunteering for other organisations (whether good or bad practice) but it will mean that the

³² Terry Wallace 'Working of the Train Gang: Alienation, Liminality and Communitas in the UK Preserved Railway Sector' *International Journal of Heritage Studies*12:3 (2006), 218 - 233

time to be given to the museum will have to be slotted into schedules with few alternative dates and times.

- 320 The following generation – 'Generation X' – is likely to have different expectations again. These might include a more laid-back environment than that which characterises many museum operations, have expectations of being technologically-up-to-date and, as many will be planning on working full- or part-time for another thirty years, learning opportunities that will add value to their employment prospects.
- 321 Further, changes in family relationships – including older parenting, blended families and longer working lives - taken with an increased emphasis on spending 'quality time' with the family, suggests that many will be looking for volunteer opportunities in which the whole family can participate as a group. Clearly, for the museum, this form of volunteering has the benefit not only of providing a nursery for the next generation of volunteers, but sows the seeds for relationships to be cultivated in the long-term.
- 322 'Generation Y' volunteers represent the greatest challenge for the future. They are likely only get involved when they can gain work-related experience, improve their personal statements for university applications, or socialise with their peers. They are looking for volunteer work that is frequently varied, is stimulating and fun, and to work in environments where they feel comfortable and supported.
- 323 This generation in particular, and the one that follows it, are likely to be heavily influenced by the current economic downturn. The consequences that might be surmised are:
- volunteering for purely altruistic reasons might be less of an option, either during studies or subsequently, with high calibre young people opting to volunteer in the corporate sector in order to get their foot in the right door for paid work; and, in the longer term
 - workers of the future, who graduate as students with sizeable debts, which might take at least ten years of work to pay off, might feel a greater ownership of their financial success, and consequently be less likely to give something for nothing unless convinced that their time is being well spent.
- 324 Changing practice to meet these different expectations and aspirations is a challenge for any organisation. Many independent museums have sufficient difficulties in keeping the show on the road without embarking on multi-generational volunteer development programmes, and the thought of having to do this to survive may appear daunting. Yet the increasing competition for

people's time, whether from work, families or existing volunteer commitments, makes addressing the challenge an imperative.

- 325 The ethos of the volunteer-run museum means that if there is not the capacity to replace the museum workforce, then the museum will eventually fail. This would not be a new phenomenon. Around half-a-dozen volunteer-run museums leave the Register of Charities each year, some after a lengthy period of suspended animation. Additionally, some proto-museums never make it beyond the 'good idea' stage, and wither when the project proves impractical and the initial enthusiasm is exhausted. Those that survive are those with deep roots, where generational change has been achieved.
- 326 For middle-sized independent museums located in well-populated areas with good transport connections and where volunteers supplement paid staff, the challenge may be met in a somewhat different way. Here there may be the possibility of alliances with local partners to operate joint schemes targeted at unrepresented volunteer groups, where pooled resources can provide a better offer.
- 327 Whichever route is chosen, volunteering is never the win/win situation for both volunteer and museum that it is often represented as being. It is certainly true that a structured, well-run volunteer programme can both sustain the museum and provide a feeling to wellbeing to the volunteer. However, it also has to be accepted that:
- there are practical limitations to what can be achieved by volunteer effort alone;
 - not all volunteer effort is effective, appropriate, or successful, nor are all volunteers equally-skilled, so some well-intentioned efforts may backfire;
 - the volunteers recruited may not be best-suited to the types of task to be performed; and
 - the increasing complexities of society at large are reflected in volunteers as much as any stakeholder group.

Planning & Foresight

- 328 Museums are unlikely to maximise their potential for volunteering unless they capture the information they need to plan effectively. The minimum information required is:
- the size, scale and the contribution made by their volunteers, and reporting it through trustees' annual reports both as an indicator of

public benefit and to provide a rounded picture of the museum's operation to the outside world;

- understanding the levels and types of volunteer contribution that are needed to sustain the museum in the longer term;
- the composition and demographics of the volunteers who support them; and
- the changes that will be needed to facilitate the introduction of volunteers from the coming generations.

329 Where museums adopt one or more of the different volunteering model(s), the following targets might be set:

- for the resources model , the volunteer hours required to meet the objectives set in business planning;
- for the leisure model, the number of volunteers participating;
- for the social service model, the number of 'cases' to be dealt with; and
- for the relationship model, measures of the connections made by supporters between different areas of the museum's work.

Appendix A

Methodology

- 1 Establishing a base statistical sample for this study was not straightforward. The *AIM 50*, a sample of fifty independent museums in England and Wales drawn from the *Egeria* database of independent museums, including just under 1,000 museums, and which has been used as the basis of previous studies for AIM, could not be used as less than 10% of that group reported any figures about volunteering in their organisations
- 2 As a consequence, another group of 50 museums in England & Wales was created by trawling the *Egeria* database to identify the small number of museums that reported volunteer numbers or hours worked. The consequence of this approach was that, although the sample was broadly representative in terms of distribution within Wales and the English regions, there was less balance between museum types. In terms of income, the smallest independent museums which make up more than two-thirds of the constituency was substantially under-represented, nor was the sample proportionately representative of the other income bands.
- 3 The final sample is more fully described in the following table:

| Element | <i>Egeria</i> Database % | Sample % |
|-----------------------------|--------------------------------|-------------|
| | | |
| <i>Nation/Region</i> | | |
| Wales | 4 | 3 |
| East of England | 15 | 10 |
| East Midlands | 9 | 5 |
| London | 9 | 8 |
| North East | 4 | 3 |
| North West | 7 | 6 |
| South East | 22 | 28 |
| South West | 18 | 28 |
| West Midlands | 7 | 3 |
| Yorkshire | 9 | 8 |
| | | |
| <i>Type</i> | | |
| Regimental & Corps | 11 | 3 |
| Historic Houses | 3 | 25 |
| Industry | 7 | 16 |
| Transport | 12 | 14 |

| Element | Egeria Database % | Sample % |
|-----------------------|----------------------------------|---------------------|
| Personalia | 4 | 3 |
| Art | 3 | 9 |
| History & Archaeology | 57 | 44 |
| | | |
| Income | | |
| £20k - £100k | 69 | 23 |
| £100k – £250k | 11 | 16 |
| £250k - £500k | 6 | 22 |
| £500k-£750k | 3 | 6 |
| £750k- £1m | 2 | 6 |
| £1m - £5m | 8 | 26 |
| | | |

- 4 As not every museum reported in each category of information sought, to achieve a 95% confidence level the confidence interval ('margins of error') on all the samples is larger than might be preferred in other circumstances. The confidence intervals relative to each base figure used are:

| Base | 11 | 29 | 40 | 46 |
|---------------------|-----------|-----------|-----------|-----------|
| Confidence interval | ±30% | ±18% | ±15% | ±14% |

- 5 Notwithstanding these sampling difficulties, the range of figures, in fact, is sufficiently broad so that the application of the confidence intervals has little impact on relative figures, so it is felt that they are useable, albeit with some caution.

Appendix B

The National Indicators For Volunteering & The Voluntary Sector

The new local government performance framework includes a set of National Indicators which cover all the national priority outcomes which local authorities will be responsible for delivering. Two of the indicators are NI 6 'Participation in regular Volunteering' and NI 7 'An environment for a thriving third sector'.

Each Local Area Agreement (LAA) will have up to 35 of these targets agreed as priorities. The table that follows records:

- the areas in the English regions against which National Indicators will be collected (these are Local Strategic Partnership Areas that include top-tier local authorities, district councils, health authorities and public protection services);
- the 43 areas that have adopted NI6 (participation in volunteering) and the 63 that have adopted NI7 (thriving third sector) as priorities; and
- the baseline percentages for NI6 – volunteering once a month during the previous twelve months - and NI7 – the net percentage believing local authority is a positive influence on their work - against which improvement is expected.

NI Priorities in English Local Authorities

| Region | | NI 6 | NI 6 % ¹ | NI 7 | NI 7 % ² |
|------------------------|------------------|------|---------------------|------|---------------------|
| East of England | Bedfordshire | | | | 16 |
| | Cambridgeshire | | 28.4 | ✓ | 15.3 |
| | Essex | ✓ | 25.2 | | 15.9 |
| | Hertfordshire | | 26 | ✓ | 14 |
| | Luton* | | 23.5 | ✓ | 18.7 |
| | Norfolk | | 25.7 | ✓ | 18.4 |
| | Peterborough | ✓ | 23.3 | | 18.3 |
| | Southend-on-Sea | | 21.8 | | 20.1 |
| | Suffolk | | 27 | | 16.6 |
| | Thurrock | | 18 | ✓ | 8.8 |
| | | | | | |
| East Midlands | Derby* | | 22.5 | | 20 |
| | Derbyshire | | 22.2 | ✓ | 14.3 |
| | Leicester | | 19.3 | | 19.6 |
| | Leicestershire | ✓ | 23.4 | | 17.3 |
| | Lincolnshire | ✓ | 23.5 | | 16.2 |
| | Northamptonshire | | 23.7 | ✓ | 12.9 |
| | Nottingham | | 20.5 | ✓ | 19.1 |
| | Nottinghamshire | | 22.3 | ✓ | 19.1 |
| | Rutland | | 29.6 | ✓ | 11 |

| Region | | NI 6 | NI 6 % ¹ | NI 7 | NI 7 % ² |
|-------------------|-------------------------|------|---------------------|------|---------------------|
| London | Barking and Dagenham | | 16 | | 18.3 |
| | Barnet | | 26.1 | | 9.5 |
| | Bexley | ✓ | 20.2 | | 10.6 |
| | Brent* | | 20.3 | | 13.1 |
| | Bromley | ✓ | 23.2 | | 12.3 |
| | Camden* | ✓ | 24.7 | | 10.7 |
| | City of London* | | 23.6 | ✓ | 9.7 |
| | Croydon | | 22.8 | ✓ | 15.9 |
| | Ealing | | 20 | | 14.5 |
| | Enfield | ✓ | 21.9 | | 14 |
| | Greenwich | | 19.9 | | 20.9 |
| | Hackney* | | 21.9 | | 17.8 |
| | Hammersmith & Fulham* | | 21 | | 13.1 |
| | Haringey* | ✓ | 21 | | 18.9 |
| | Harrow | ✓ | 24 | ✓ | 10.4 |
| | Havering | | 19.8 | ✓ | 10.6 |
| | Hillingdon | ✓ | 21.8 | | 11.7 |
| | Hounslow | | 16.8 | ✓ | 16.4 |
| | Islington* | ✓ | 22.8 | | 13.5 |
| | Kensington and Chelsea* | ✓ | 20.3 | | 13.7 |
| | Kingston upon Thames | | 23 | ✓ | 13.2 |
| | Lambeth* | | 18.5 | | 17.3 |
| | Lewisham* | | 18.3 | ✓ | 24.4 |
| | Merton | | 19.7 | | 14.4 |
| | Newham* | ✓ | 20.5 | | 18.4 |
| | Redbridge | ✓ | 21.6 | | |
| | Richmond upon Thames | | 24.3 | | 12.1 |
| | Southwark* | | 21.5 | | 14.7 |
| | Sutton | | 17.4 | | 11.9 |
| | Tower Hamlets* | | 20.8 | ✓ | 21.1 |
| | Waltham Forest* | | 17.1 | | 13.3 |
| | Wandsworth | | 15.4 | | 18.1 |
| | Westminster* | | 20.7 | | 10.3 |
| North East | Darlington | ✓ | 19.8 | ✓ | 11.9 |
| | Durham | ✓ | 19.7 | | 17.6 |
| | Gateshead | ✓ | 15.8 | ✓ | 19.8 |
| | Hartlepool | ✓ | 18.6 | | 23.3 |
| | Middlesbrough | | 16.5 | ✓ | 17.7 |
| | Newcastle upon Tyne | | 17.8 | | 22.3 |
| | North Tyneside | | 17.2 | | 16.6 |
| | Northumberland | ✓ | 24.9 | ✓ | 17.1 |
| | Redcar & Cleveland | ✓ | 20.2 | ✓ | 14.4 |
| | South Tyneside | ✓ | 15.2 | | 18.3 |
| | Stockton-on-Tees | | 17.1 | | 27.2 |
| | Sunderland | | 14.4 | | 13.7 |
| North West | Blackburn with Darwen* | | 23 | ✓ | 26.9 |
| | Blackpool | | 20.6 | ✓ | 17.4 |
| | Bolton | ✓ | 22 | | 23.2 |
| | Bury | | 21.4 | | 18.8 |
| | Cheshire | | 23.7 | | 16.4 |

| Region | | NI 6 | NI 6 % ¹ | NI 7 | NI 7 % ² |
|-------------------|------------------------|------|------------------------|------|------------------------|
| | Cumbria | | 26.3 | ✓ | 17.4 |
| | Halton ² | | 17.7 | ✓ | 22.7 |
| | Knowsley | | 14.3 | | 23.6 |
| | Lancashire | ✓ | 23.9 | ✓ | 16.1 |
| | Liverpool* | | 20.6 | | 19.3 |
| | Manchester* | | 19.6 | ✓ | 22.6 |
| | Oldham* | | 25.2 | | 21.6 |
| | Rochdale* | ✓ | 23.1 | ✓ | 15.4 |
| | Salford* | ✓ | 19.9 | | 21.4 |
| | Sefton | | 18.3 | ✓ | 15.5 |
| | St Helens* | ✓ | 20.8 | | 27.9 |
| | Stockport | | 25.7 | | 13.3 |
| | Tameside | | 18.5 | | 20.1 |
| | Trafford | ✓ | 19.5 | | 10.4 |
| | Warrington | | 23.9 | ✓ | 20.1 |
| | Wigan* | | 19.8 | ✓ | 16.6 |
| | Wirral | | 21.2 | | 15.3 |
| South East | Bracknell Forest | ✓ | 20.6 | | 21.8 |
| | Brighton and Hove | ✓ | 24.3 | ✓ | 19.8 |
| | Buckinghamshire | | 30.1 | ✓ | 16 |
| | East Sussex | | 26.8 | | 12.9 |
| | Hampshire | ✓ | 24.1 | | 19 |
| | Isle of Wight | | 26.2 | ✓ | 11.8 |
| | Kent | ✓ | 23.3 | | 15.8 |
| | Medway | | 20.6 | | 17.6 |
| | Milton Keynes | | 22.8 | | 21 |
| | Oxfordshire | ✓ | 28.6 | | 14.9 |
| | Portsmouth | ✓ | 18.3 | | 20.9 |
| | Reading | | 24 | | 18.7 |
| | Slough | | 16.7 | | 16 |
| | Southampton | | 21.7 | | 17.9 |
| | Surrey | | 24.4 | ✓ | 15.1 |
| | West Berkshire | ✓ | 27.3 | | 12.4 |
| | West Sussex | | 26.3 | ✓ | 15.3 |
| | Windsor and Maidenhead | | 23.2 | ✓ | 15.6 |
| | Wokingham | | 27.1 | ✓ | 14.4 |
| South West | Bath & N E Somerset | | 27.4 | | 13.5 |
| | Bournemouth | | 21.8 | ✓ | 17.9 |
| | Bristol | | 24.1 | ✓ | 14.7 |
| | Cornwall | | 32.3 | | 17.9 |
| | Devon | | 31.2 | ✓ | 15.4 |
| | Dorset | | 28.6 | ✓ | 15.4 |
| | Gloucestershire | | 27 | ✓ | 13.9 |
| | North Somerset | | 27.1 | | 15.8 |
| | Plymouth* | | 19.8 | ✓ | 14.2 |
| | Poole | | 22 | ✓ | 13 |
| | Somerset | ✓ | 30.3 | | 16.3 |
| | South Gloucestershire | ✓ | 25.5 | ✓ | 18.8 |
| | Swindon | | 22.6 | | 16.5 |
| | Torbay | | 25.3 | ✓ | 12.2 |
| | Wiltshire | | 29.6 | ✓ | 18.2 |

| Region | | NI 6 | NI 6 % ¹ | NI 7 | NI 7 % ² |
|-----------------------------------|----------------------------|-----------|---------------------|-----------|---------------------|
| West Midlands | Birmingham | | 16.7 | | 15.1 |
| | Coventry | | 17.5 | | 13.3 |
| | Dudley | | 16.8 | ✓ | 13.4 |
| | Herefordshire | ✓ | 28.9 | | 14.9 |
| | Sandwell | | 17.1 | | 17 |
| | Shropshire | | 32.2 | | 16.9 |
| | Solihull | ✓ | 22.1 | ✓ | 11.3 |
| | Staffordshire | ✓ | 18.9 | ✓ | 14.6 |
| | Stoke-on-Trent | | 15.6 | | 13 |
| | Telford and Wrekin | | 23.6 | | 24.7 |
| | Walsall | | 18.5 | ✓ | 16.8 |
| | Warwickshire | ✓ | 26 | | 16.2 |
| | Wolverhampton [†] | | 20.8 | ✓ | 19.5 |
| | Worcestershire | | 25.5 | | 14.5 |
| Yorkshire & The Humber | Barnsley | | 18.3 | ✓ | 13.5 |
| | Bradford | | 27.1 | | 19 |
| | Calderdale | | 26.4 | ✓ | 15.1 |
| | Doncaster | | 19.6 | ✓ | 15.5 |
| | East Riding of Yorkshire | | 24 | ✓ | 16.4 |
| | Kingston upon Hull | | 14 | | 20.4 |
| | Kirklees | ✓ | 25.6 | | 17.8 |
| | Leeds | | 19.6 | | 17.2 |
| | North East Lincolnshire | | 19 | | 15.1 |
| | North Lincolnshire | | 20.7 | ✓ | 18.2 |
| | North Yorkshire | | 29.5 | | 15.5 |
| | Rotherham | | 20 | ✓ | 15.8 |
| | Sheffield | | 21.1 | | 14.7 |
| | Wakefield | | 18.1 | ✓ | 15.9 |
| | York | ✓ | 23 | ✓ | 19.7 |
| National | | 43 | 23 | 63 | 16.2 |

¹ % volunteering at least once a month in the previous twelve months

² Net % believing local authority is a positive influence on their work

* Response rate below 30% - lower quality data

Sources: DCLG (NI6); National Survey of Third Sector Organisations (NI7)