

Museums & Galleries NSW

Volunteer Succession Planning

A PRACTICAL GUIDE

Four key areas for Community Museums:

Succession Planning is about planning appropriate action when a person who currently holds a key position in your museum moves on or is no longer available.

Succession planning is also about retaining your current volunteers, and engaging fresh new faces. Within your museum, there are four key areas of activity within which Volunteer Succession Planning can be put into action. These are:

- 1 Strategic planning
- 2 Valuing volunteers
- 3 Developing a cultural ethos (or the internal environment) for your Museum
- 4 The Public Face of your Museum

1. Strategic Planning

Definition: A strategic plan maps the future direction of your museum. Developed with the input of your team and your community, a strategic plan helps to identify the key skills needed to achieve your museum's mission, identifies any skills or resources required to achieve planned future direction, and can be a tool to attract new volunteers while keeping your current volunteers inspired!

Actions you can take:

Get People Involved!

- Your Strategic Plan should be inclusive, it is a uniting document
- When developing your Strategic Plan include all museum workers (paid and volunteer) in the process so that everyone has a sense of ownership of the vision; it becomes a shared vision and helps to inspire your volunteers
- Include the wider community in the planning and promotion of your Strategic Plan e.g. council, school groups, service organisations (rotary, lions etc), local businesses, tourism office, local clubs and meeting groups (women's auxiliary, sporting, servicemen and women etc). These people are your stakeholders: supporters, backers, visitors, and potential volunteers
- Strategic Plans encourage new and retains current volunteers creating a visionary statement shared by your team
- Make sure your team knows what your museum's mission is! Sing its praises to new volunteers and visitors!

Fact Sheet

Do you have the right stuff? Identify skills and gaps

- Strategic Plans help identify key roles and skills and helps develop new leaders within the museum
- Undertake a skills audit as part of your planning
- Identify gaps in your museum resources, such as key skills required to realize your museum's mission – and recruit strategically
- Recruit new volunteers through targeting individuals from the list of people consulted in creating a Strategic Plan
- Get all existing volunteers in key positions to write a detailed position description, key responsibilities and key dates throughout the year
- Have a mentoring plan for nurturing a deputy for all key positions
- Rotate committee roles and key roles in museum

Be as open as possible in your decision making process

- Make sure new policies, partnerships and meeting minutes are well documented and accessible to both museum workers and wider public if appropriate
- Know your museum/volunteer responsibilities Create a volunteer policy and agreement
- Create, circulate, and update a historical record, management manual, strategic plan, and financial budget
- Devise a succinct Management Manual outlining purpose of each committee, a description of each committee's responsibilities, details of the policies for each committee, and all job descriptions for your committees and key position holders
- Produce an annual Financial Budget detailing past expenditures and income, and forecasted receipts and expenditures based on strategic plan.

2. Valuing Volunteers

Definition: The way that you value your volunteers i.e. providing them with work facilities, recognising and developing skills, including them in planning and programs, honoring outgoing volunteers, and acknowledging and rewarding their achievements. These are essential to volunteer succession planning.

Actions you can take:

- The degree to which you value your volunteers affects your organisation through new recruitment, retention of existing volunteers, level of volunteer job satisfaction and therefore how well they do their job

Recruitment

- People are attracted to an organisation for a myriad of reasons, but especially successful and happy ones.
- All visitors are potential volunteers
- Promote the success of your museum in newspapers, community bulletins, local news, and own newsletter. Success breeds success
- Have a volunteer space with tea/coffee facilities etc

Fact Sheet

Retaining

- How does your museum make volunteers feel welcome?
- Through nurturing, training, learning, being inclusive
- Conduct induction programs that includes a tour, introduction to staff, background/history of organisation, buddy system, OH&S, identify someone to manage volunteers, induction pack etc
- Consider who your volunteers are, what they are looking for by volunteering, and what particular skills they bring to the museum.

Recognise and Reward

- Write letters and postcards of thanks
- Offer personal praise where appropriate
- Provide identification badges, volunteer shirts
- Public acknowledge volunteers and present awards
- Send Christmas/birthday etc cards
- Host social events
- Listen to volunteers ideas provide a suggestion box

Training and Learning

- Encourage and support training initiatives and skill development such as mentoring programs, workshops, internal and external training. This enhances confidence and willingness to tackle new challenges and roles within organisation. MGNSW can assist with funding, through Leg Ups, for volunteers to attend training or host workshops (visit website www.mgnsw.org.au). For training programs contact MGNSW, Regional Arts NSW, PHM Regional Museum Program, Museums Australia.
- These ideas on valuing volunteers should be incorporated into your Strategic Plan.

Honoring

- Ambassador role
- Honor board
- Invites to openings
- End of service party/function etc
- Make a life long member
- Service acknowledged by Mayor – letter etc
- Get outgoing volunteers to do simple tasks where they are not required to be in museum

3. Cultural Ethos

Definition: The internal environment in your museum determines how welcome your current and potential volunteers feel. Remember that every visitor is a potential volunteer. Be inclusive not exclusive.

Actions you can take:

- Be welcoming to new volunteers - see Valuing Volunteers
- Be accepting and welcoming of new ideas
- Maybe something that once didn't work will work now with a fresh approach and new people.
- Visitors are potential volunteers, sponsors, and promoters etc.
- Having a welcoming entrance/space and have it serviced by the right people with the appropriate skills

Fact Sheet

- Make sure amenities are clean and tidy
- Encourage a diverse groups of volunteers so as to have a larger skills set at your disposal be active in your recruitment
- Provide job descriptions
- Provide skill and development opportunities for people
- Be inclusive not exclusive

4. The Public Face of your Museum – Programs and Partnerships

Definition: The public face of your museum; for example your promotion, your programs, your partnerships with the community and council helps retain your volunteers and attract new team members.

Actions you can take:

- Promote your Museum and your Volunteers!
- Promote yourself at every opportunity
- Be sure your volunteers and staff are aware of current promotions
- Create and manage a lively program of public events e.g. openings, workshops etc
- Be part of a proactive and vibrant community
- Encourage volunteers to take on new tasks/responsibilities
- Form Networks and Partnerships
- Be daring, take calculated risks, experiment
- Seek skills outside the traditional museum area for instance computing, carpentry, and accounting etc.
- Seek mutually beneficial partnerships
- Be open to partnerships with council
- Work for the dole, work experience, and student projects etc can provide new volunteers
- Promote all new exhibitions, activities, and events
- Infiltrate council understand councils short and long term goals and how your museums may be able to provide and receive benefits

REMEMBER SUCCESSION MEANS SUCCESS!!!

M&G NSW acknowledges the work of Kerry Spinks (Volunteering NSW) in the development of this Volunteer Succession Planning resource. Please see the Volunteering NSW website (www.volunteering.com.au) for further details.