

## How to:

# Volunteer succession planning – a 'how-to' guide

Succession planning is planning for when a person who currently holds a key position or important skills moves on or is no longer available.

Succession planning is also about retaining current volunteers as well as engaging new volunteers.

There are four key areas of activity within which volunteer succession planning can be put into action:

- Strategic planning
- Valuing volunteers
- Developing a cultural ethos (or the internal environment) for your Museum
- The public face of the museum

## Strategic Planning

A Strategic Plan maps the future direction of the museum. Best developed with the input of all staff and volunteers, a Strategic Plan helps identify key skills needed to achieve the museum's mission, defines skills and resources required and provides a tool to attract new volunteers while keeping the current volunteers inspired.

### Actions you can take:

#### Get people involved!

- A Strategic Plan should be an inclusive, uniting document
- When developing the 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 everyone involved with the museum.
- Include the wider community in the planning and promotion of the 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 the stakeholders: supporters, backers, visitors, and potential volunteers

- Make sure everyone knows what the museum's mission is

#### Do you have the right stuff? Identify skills and gaps

- Undertake a skills audit as part of annual planning
- Identify gaps in the museum resources, such as key skills required to realize your museum's mission
- Recruit strategically according to what has been identified in the audit
- Recruit new volunteers through targeting individuals from the list of people consulted in creating a Strategic Plan
- Ask existing volunteers in key positions to write a detailed position description, complete with their key responsibilities and important 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 the decisionmaking process

- Make sure new policies, partnerships and meeting minutes are well documented and accessible to museum workers and the wider public if appropriate
- Know the museum volunteer responsibilities - write a volunteer policy and agreement
- Create, circulate, and update a historical record, management manual, strategic plan, and financial budget
- Develop a 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 committees and key position holders. Be succinct
- Produce an annual financial budget detailing past expenditures and income, and forecasted receipts and expenditures based on the Strategic Plan

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# Valuing Volunteers

Show that volunteers are valued by providing them with appropriate work facilities and projects, recognising and developing their skills, including them in planning and programs, honoring outgoing volunteers, and acknowledging and rewarding their achievements. These are essential to volunteer succession planning.

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

## Actions you can take:

### Recruitment

- People are attracted to an organisation for a variety of reasons, but are especially keen to join positive, successful and happy organisations
- Consider all visitors as potential volunteers
- Promote the success of themuseum in newspapers, community bulletins, local news, and the museum newsletter
- Provide volunteers with tea and coffee-making facilities etc.

### Retaining Staff

- Welcome volunteers through nurturing, training, learning and inclusive behaviours
- Conduct induction programs that include a tour of the facility, introduction to staff, background and history of the organisation, and provide WH&S training
- Identify someone to manage volunteers, provide an induction pack and establish a 'buddy system' for new recruits
- 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
- Publically acknowledge volunteers and present awards
- Send Christmas and birthday cards
- Host social events
- Listen to volunteers' ideas in person or through a suggestion box system

### Honor

- Establish an Ambassador role
- Provide an Honor board
- Invite all volunteers to openings as guests
- Host an end of service party
- Implement a life-long membership
- Ask volunteer service to be acknowledged by Mayor or community elder
- Ask volunteers to do extra tasks if time permits

### 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 the organisation
- Incorporate ideas on recognising and training volunteers into your Strategic Plan

## Cultural Ethos

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

### Actions you can take:

- Actively welcome new volunteers - learn their names, which days they are rostered on and something about them personally
- Accept and welcome ideas from new volunteers. Initiatives often work better when implemented by those who generate them
- Provide a welcoming entrance and service it with people with appropriate skills
- Ensure amenities are clean and tidy
- Encourage a diverse groups of volunteers so as to have a large skills set at your disposal—actively recruit new staff
- Provide job descriptions

## The 'public face' of the museum

The way you communicate about the museum in all promotion, programs and partnerships is critical in retaining volunteers and attracting new team members.

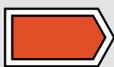
### Actions you can take:

#### Promote your museum and your volunteers!

- Actively promote the museum
- Inform volunteers and staff about current promotions and programs
- Create and manage a lively program of public events such as openings and workshops
- Encourage volunteers to take on new tasks and responsibilities

#### Form networks and partnerships

- Be daring, take calculated risks, experiment
- Seek skills outside the traditional museum area such as in computing, carpentry, accounting etc.
- Seek mutually beneficial partnerships
- Be open to partnerships with the local council
- Work for the dole, work experience, and student projects etc can provide new volunteers
- Promote all new exhibitions, activities, and events
- Develop a real understanding of the local council's short and long-term goals and think strategically about how the museum may be able to provide and receive benefits.



### You might also like ...

**Managing volunteers in museums and cultural collections: ten things you should know. Arnoldi, Helen (2010)**

[library.unimelb.edu.au/\\_data/assets/pdf\\_file/0008/1658888/helenarnoldimanagingvolunteers2011.pdf](http://library.unimelb.edu.au/_data/assets/pdf_file/0008/1658888/helenarnoldimanagingvolunteers2011.pdf)

**Volunteering Resources. Volunteering Australia**

[volunteeringaustralia.org/volunteering-resources/volunteer-managers/](http://volunteeringaustralia.org/volunteering-resources/volunteer-managers/)

**Volunteer guidelines writing guide. History SA, (2010)**

[community.history.sa.gov.au/files/documents/volunteer-guidelines-writing-guide.pdf](http://community.history.sa.gov.au/files/documents/volunteer-guidelines-writing-guide.pdf)

**Willing & Able: Recruiting, managing and retaining volunteers in museums and galleries. Bowbridge, Nina and Creyton, Mark (2002)**

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