



# HERITAGE LINK

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## **VOLUNTEERS AND THE HISTORIC ENVIRONMENT**

Research undertaken by Heritage Link on behalf of English Heritage for Heritage Counts 2003: The State of the Historic Environment Report

### **Executive summary**

The main objectives of this study are:

- to create an initial overview of historic environment volunteering in England, by mapping the numbers and types of people involved and the types of activity they engage in;
- to put volunteering within this sector into the bigger context of voluntary activity in the UK and to understand what pressures and trends are driving change
- to identify specific issues for the sector and further policy and research implications.

As a result of the study it is estimated that:

- England has at least 107 national voluntary bodies and umbrella groups devoted to some aspect of the historic environment
- Their total combined membership is estimated to be 1,149,000 (1.947 per cent of the UK population)
- Of this number, England has an active heritage volunteer workforce of some 155,000 individuals
- Contributing unpaid work worth at least £25 million
- Volunteers contribute an additional £100 million a year to the hidden heritage economy through their subscriptions to heritage bodies (a figure that excludes donations and legacies)
- Many of the sector's volunteers are highly skilled and they perform a range of functions that are vital to the heritage, and hence to the character and economy of this country.
- Without volunteer input, most of the organisations that operate within the heritage sector would struggle to survive, and their capacity to contribute to the tasks of researching, managing and conserving the heritage would be severely constrained. The National Trust, for example, is a true partnership of volunteers and paid staff, with volunteers undertaking 45 per cent of the organisation's total work.
- The National Trust, with its 40,000 volunteers, and NADFAS, with its 80,000 UK members, provide clear evidence of how much can be achieved when the recruitment, training and management of volunteers is seen as one of the main pillars of the organisation's strategy for achieving its goals.

Despite this fundamental dependence on skilled volunteers, few heritage organisations have an explicit strategy for volunteer recruitment and deployment, and few are aware of best practice within the voluntary sector. The sector can learn much by engaging with national umbrella groups, such as the National Centre for Volunteering.

In order to help the sector develop a more positive and strategic approach to volunteering it is recommended that a Volunteer Co-ordinator post be created as a sectoral resource, funded from such sources as the Heritage Lottery Fund or the Home Office Active Community Unit.

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## **SECTION 1    FACTS AND FIGURES**

Of the three objectives of the project listed above, the central objective of the research was to map heritage volunteer activity in the UK and to answer such fundamental questions as: how many people are involved in voluntary work within the heritage, how much time do they give and what is the value of that time?

### **Volunteering on a national scale**

According to the *National Survey of Volunteering* carried out in 1997 by the Institute for Volunteering Research:

- 22 million adults are involved in formal<sup>1</sup> volunteering each year (ie 37 per cent of the UK population of 59 million (source for population figure: Office for National Statistics <www.statistics.gov.uk>)
- 90 million hours of formal voluntary work takes place each week
- The economic value of formal volunteering is in the region of £40 billion per year (ie 18 per cent of UK Gross GDP of £218 billion (source for GDP figure: Office for National Statistics <www.statistics.gov.uk>).

The Office of National Statistics, using narrower definitions of volunteering activity, estimates that the economic value of time given by volunteers is 'over £15 billion' (8.5 per cent of GDP), and that around £9 billion a year is donated to charities in cash.

Therefore the scale of volunteering in the UK in all areas is therefore somewhere between 8 and 18 per cent of GDP, which goes a long way to explaining why volunteering commands a high political priority, and why the UK Treasury and the Home Office have together undertaken much research and consultation over the last few years to try and understand and encourage volunteering.

### **Heritage volunteers**

By comparison, very few heritage organisations maintain accurate records of the time contributed by volunteers. Nevertheless, the following statistics are available, and enable some estimates to be made of the scale of heritage volunteering in England.

- England has at least 107 national voluntary bodies and umbrella groups devoted to some aspect of the historic environment (see Appendix B)
- That figure is made up of 68 small organisations (with an average of 500 members each), 31 medium-sized organisations (with an average of 5,000 members each), and 8 large organisations (with 120,000 plus members each). That makes 107
- Their total combined membership is estimated to be 1,149,000 (1.947 per cent of the UK population)
- The average membership fee is £16
- The total membership fee value is therefore £18,384,000 (0.2 percent of the £9 billion a year donated to all charities)
- In addition, the National Trust has 3 million members and English Heritage has 445,000 members. These members contributed a total of £82 million to the two organisations in

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2002/3 in membership fees. It is not known how many of these are members of more than one organisation: it is likely that there is some degree of overlap

- Figures for active participation in these bodies is estimated to be 6.5 per cent of the membership, so the number of active volunteers amounts to 73,745 people
- In addition the National Trust has 40,000 active volunteers (source: the National Trust Annual Report 2002), Heritage Open Days has 23,000 volunteers (source: SHER 2002, page 66) and there are 18,838 volunteers involved in opening up churches, cathedrals and historic houses to visitors (source: SHER 2003 page 50)
- This very conservative estimate of the numbers of heritage volunteers therefore adds up to 155,583 people (0.26 per cent of the UK population); for comparison, the Meals on Wheels service has 110,000 volunteers.
- Valuing their inputs at one day per person each at £100 a day on average, their contribution is worth £15.55 million (around 0.1 per cent of the total value of voluntary work in the UK using Office of National Statistics estimates).

These figures are substantial and impressive, but they also undoubtedly represent an underestimate of the true level of volunteer input to the heritage, since many volunteers give for more than a day a week to their favoured cause, and the figures presented here only measure those volunteers who give money and/or time to the heritage through a formal heritage body.

There are undoubtedly many thousands of people who simply turn up at weekends to do valuable work in excavation and field walking, in canal and railway restoration, in maintaining historic woodlands and hedgerows or in fundraising and membership recruitment, who do not and never will appear in any official record.

People questioned for this survey also felt that there were now more people involved in volunteering work for heritage organisations than ever before. As evidence for this they pointed to the slow but steady growth in numbers working voluntarily for the National Trust (a 30 per cent increase in the last ten years), in the growth in the number of volunteer-dependent independent museums and heritage sites open to the public, in the growth in popularity of industrial and transport heritage (canals, railways, boats, buses and aircraft) and war heritage, and in the high profile given to heritage by TV programmes.

### **England without its heritage volunteers**

Because there are so many different ways in which people can contribute voluntarily to the heritage, it will never be possible to pin down precise figures. However, it is possible to indicate the scale of the contribution made by heritage volunteers by imagining what England would be like without heritage volunteers.

- The National Trust (which was itself founded by volunteers) would be a tiny and constrained organisation without the input of the 40,000 volunteers who work in 150 different types of task for the Trust, most visibly serving as guides and room stewards at Trust properties. They represent 1.33 per cent of its membership, contributing 2.4 million hours of their time (60 hours per person on average, or just over one hour a week), with an estimated annual value of £14 million (assessed at a very conservative £5.80 an hour; source: National Trust Annual Report 2002). Volunteers working for the Trust contribute 45 per cent of the Trust's total working time, an amount of time equivalent to 1,330 additional full-time posts.
- English Heritage would have many fewer enthusiastic visitors to its properties without the 8,000 or so participants in living history events that are a distinctive part of English Heritage's strategy for attracting members of the public to its properties. Living history events take place at many properties throughout the year, and many groups come together for the annual Living History Festival, the biggest event of its kind in Europe (source: National Association of Re-enactment Societies)

- There would be almost no functioning historic canals and railways; voluntary organisations concerned with transport history have over 12,000 members and are amongst the largest and most active in the land (source: Heritage Lottery Fund report on Transport Heritage Needs)
- Churches and cathedrals would be locked much of the time without the 6,280 volunteers who provide access and security through church watch schemes, welcome visitors and offer guided tours, maintain churches and churchyards, and write church and parish histories (source: SHER 2002 and the English Tourism Council's 2001 Survey of Visits to Visitor Attractions)
- Many historic houses would be unable to open to the public without the 9,440 unpaid volunteers who work for members of the Historic Houses Association (source: SHER 2002 and the English Tourism Council's 2001 Survey of Visits to Visitor Attractions)
- Without volunteers there would be no National Gardens Scheme (350,000 visitors to 3,500 gardens, many of them important historically as well as their botanic significance; source: <www.ngs.org.uk>), Heritage Open Days (800,000 visitors to 2,134 sites; source: Civic Trust report on Heritage Open Days), no National Archaeology Days (60,000 visitors to 3,600 sites; source: CBA report on National Archaeology Days), no London Open Weekend and no London Garden Squares Days; altogether the number of volunteers involved in these schemes is likely to around 60,000
- There would be no Civic Trusts (membership over 300,000; source: Civic Trust) to serve as watchdogs within our communities to scrutinise planning applications, no amenity societies to undertake case work and act as guardians of the heritage, and no Buildings Preservation Trusts to rescue 50 historic buildings a year in need of care
- Without the efforts of volunteers working for such bodies as the Historic Chapels Trust and the Friends of Friendless Churches, redundant churches and the country's important legacy of non-conformist chapels would have been irreversibly eroded through demolition or conversion to private residences, restaurants, discos or clubs
- Museums all over the country would be constrained in their ability to make new acquisitions without the fundraising activities of the 200,000 volunteers, supporters and fundraisers who belong to the British Association of Friends of Museums (source: www.bafm.org.uk). According to BAFM, volunteers account for nearly 50 per cent of the workforce in museums (excluding those run by local authorities) and 16 per cent of museums are run entirely by volunteers.
- We would have little or no understanding of garden history, vernacular buildings, industrial archaeology, marine archaeology or the archaeology of the Second World War. All are subjects that originated from the commitment and enthusiasm of volunteer groups, and only later were later adopted by academics and professionals, and not the other way around
- Thousands of volunteers underpin the work of county and local history and archaeological societies, undertaking field work, organising lectures and publishing journals, continuing a thriving tradition of amateur involvement in primary research that goes back to the eighteenth century; despite concerns about the professionalisation of archaeology in England as a result of the demands of developer-funded archaeology, under PPG16, the CBA has a membership of 350,000, most of whom are actively involved in archaeological fieldwork or research in a voluntary capacity.
- Without volunteers working on the 1,000-plus projects organised by BTCV (British Trust for Conservation Volunteers), the National Trust and the Wildlife Trusts every year, historic landscape features such as dry-stone walls, hedges and woodlands would deteriorate, and footpaths and stiles that enable people to enjoy the historic landscape would not be maintained and repaired
- Without the opportunities to learn new technical and social skills through volunteering, there are many people who would not have found employment or who might not have found the strength to rebuild their lives after prison, addiction or health problems
- Many of the less tangible aspects of heritage, including local food specialities, indigenous plants and fruit varieties, traditional music, folk song and dance, bell ringing, arts festivals, oral history, Black and Asian history, and family history societies depend entirely on volunteers for their existence and good health

- Without the opportunity to do voluntary work for the National Trust, NADFAS or a local museum, many retired people say they would probably be lonely, bored and depressed, and that their health, family life and longevity would suffer as a result. **Source?**
- Several of Britain's leading companies would be unable to train their staff in team-building and problem-solving activities if they were unable to take part in heritage volunteering activities

## **Conclusions**

Volunteers are not just an optional add-on to the work of professionals – they are an essential part of the fabric of the historic environment. They perform a range of functions that are vital to the character, social well-being, health and economy of this country. Many small and certainly the embryonic heritage organisations tend to be sustained by volunteers; yet in the case of the large and relatively well-resourced bodies in the sector such as the National Trust, there is a true partnership between volunteer and paid staff, each contributing half of the total time deployed by the organisation. Volunteers thus enable paid staff to engage in a greater variety and quantity of work than they could otherwise achieve.

Small bodies staffed entirely by volunteers, undertake conservation and access work at local level that national organisations are not equipped to provide, and in doing so these groups contribute to the great network of grassroots heritage activity that is a distinctive feature of English national life.

Volunteers who work for a wide range of non-heritage organisations – including the Women's Institutes, Common Ground, the Ramblers' Association, CPRE, the Open Spaces Society or the Wildlife Trusts – may not focus their efforts on heritage sites or assets, but they do have a very positive indirect impact on the heritage and its appreciation.

Without the work of volunteers in researching, managing, conserving and funding the heritage, not only would the historic landscape be considerably impoverished, many of the institutions that give our nation its distinctive character and that underpin our appeal as a tourist destination would simply not exist.

## **SECTION 2 INTERACTING WITH THE HERITAGE AS A VOLUNTEER**

In Section 1, some attempt has been made to estimate the scale of volunteering activity and to put an economic value on that contribution. This section looks in more detail at the many ways in which volunteers make their contribution. It looks at the distinction between passive and active volunteering, and at the most common forms of volunteer involvement across the heritage sector.

### **Making the invisible visible**

Looked at in terms of what we would lose without heritage volunteers (see previous section), the scale of voluntary input to the heritage is clearly substantial and extremely significant to the economics of the sector. At the same time it is almost invisible and few attempts have been made to quantify it across the sector. This apparent paradox arises because heritage volunteering is a relatively unknown quantity – unlike volunteering in the social services sector where such additionality has been the norm for some time; itself the subject of numerous research projects, and where the support and encouragement of volunteering is a major Government priority.

Little is known about volunteers in the heritage sector, and many of the people who contribute time and money to the heritage do not call themselves volunteers and do not see themselves or others in this capacity. Instead they think of themselves as trustees of a charity or trust, as members of an organisation or amenity society or even as full-time employees – for the boundaries between professional and volunteering activity connected with paid jobs is blurred by the fact that many people who are employed in the sector also do voluntary work associated with their job.

One principal aim of this study is therefore to try and make explicit what is has been to a large degree invisible.

### **Defining volunteer activity**

To do that requires an understanding of the term 'volunteer'. The Institute for Volunteering Research defines volunteering as: 'any activity which involves spending time, unpaid, doing something that aims to benefit someone (individuals or groups) other than, or in addition to, close relatives, or to benefit the environment'.

Under this very broad definition, baby sitting, looking after a pet for someone or helping them with household chores, giving advice or helping with form filling, are all counted as examples of volunteering. It is therefore not surprising that 82 per cent of respondents to the Institute's 1997 survey said they had taken part in some form of volunteering during the previous year.

For the purposes of this study, a more specific definition has been used. Volunteers are defined as those who give money and/or time to the heritage through an organised group of some kind. The last qualification is intended to filter out the many people who engage with the heritage as a hobby or leisure activity or in a purely private capacity – for example as a family historian or as the owner of a listed property.

### **Passive volunteers**

Those who give money to an organisation, through membership fees, donations, gifts or legacies, or who simply attend meetings and lectures, can all be regarded as volunteers, albeit in a passive sense. Passive volunteers are extremely important to an organisation, because they fund the activities of active volunteers, and they are the resource pool from which many active volunteers are encouraged and developed.

For many passive volunteers, the initial motivation to join an organisation is to derive a benefit in the form of free entry to historic properties or gardens, or subscription to a lecture series, to training courses or to a specialist journal. However many members who join for these reasons stay on for different reasons – to support the work of the organisation, and in solidarity with the organisation's aims and philosophy.

The National Trust, for example, finds that only 500,000 of its 3 million members have to be re-recruited every year: the remaining 2.5 million members represent a reliable foundation layer of members who are willing to pay their annual subscription, regardless of whether they intend to get full value from it in terms of free entry to properties.

It is important not to underestimate the importance of passive volunteers because they contribute the funding and support that enables the active volunteers to do their work. Research undertaken by the Gardens Trusts suggests that their active membership is around 6 per cent of their total membership (414 active members out of a national membership of 6,500, or 6.37 per cent). At county level, a typical gardens trust has 200 members of whom 30 to 40 (15 to 20 per cent) attend meetings and 12 to 13 (6.5 per cent) undertake regular voluntary work as garden researchers, event organisers or committee members. Large numbers of their members are elderly and not interested in participating in events: but they are keen to support the work of the Gardens Trusts and they value membership because of the newsletter they receive three times a year informing them of progress on various projects.

This figure of 6.5 per cent may also be typical of the active membership of other heritage bodies: certainly the Directors of various charities interviewed for this research thought it was a very plausible figure, though there is considerable variation from organisation to organisation. The National Trust, for example, has an active membership of 1.3 per cent, but within that number, it also finds that there is a core 10 per cent of volunteers who are particularly active, and who contribute a day a week each, on average.

Some groups have an even higher percentage of active members: NADFAS has one of 20 per cent, and the Association of Preservation Trusts has one of 100 per cent. Such figures can perhaps be explained in terms of the original motivation for joining the organisation, since National Trusts members join initially for free property access whereas NADFAS and APT members join an organisation whose specific purpose is to engage in hands-on conservation activity.

### **Active volunteers**

Active volunteers are those who give their time to helping the organisation achieve its broader objectives in some capacity, and who are not paid for their contribution (though they may be reimbursed for their out-of-pocket expenses).

Active volunteers undertake a very wide range of tasks, from running the organisation to undertaking simple clerical tasks, from serving as guides and interpreters to cataloguing and conserving important collections and archives. Rather than enumerating all the different forms of involvement, it is perhaps useful to consider volunteering under broad category headings.

### **The workplace model**

Many organisations, including the National Trust, have adopted a model based on best practice in the professional workplace. National Trust staff who wish to recruit volunteers are required to complete a job description template which sets out the duties involved, the hours, the skills, qualifications and personal attributes required of the applicant. Posts are advertised through the Do It website ([www.nationaltrust.org.uk/volunteering/](http://www.nationaltrust.org.uk/volunteering/)) and in local Volunteer Bureaux ([www.navb.org.uk/](http://www.navb.org.uk/)). Applicants are interviewed and if selected for the role, they sign up to a

quasi-contractual commitment. Volunteers undergo a probationary period, are trained and appraised, invited to give feedback and can even be 'retired' if expectations on either side are not met.

The procedures for recruiting and managing employees is set out in a manual, which every National Trust manager has (there are 300 copies in circulation), and this contains up to date details of essential legal and Health & Safety legislation, as well as advice on best practice.

This workplace model is used by the National Trust to recruit people with a wide variety of different skills. Volunteers undertake a huge range of tasks, from fundraising and room stewarding to highly skilled conservation and environmental projects, such as compiling a complete list of all the plants species in National Trust gardens with their locations, or undertaking archaeological investigations at Chedworth Roman Villa or Croft Castle, or advising the Trust on Health & Safety or sustainable energy use

The workplace model is one that is widely used by charities and voluntary organisations employing a large number of volunteers, and it is designed to ensure compliance with the law and best employment practice as well as consistent and fair management of volunteers. It also enables accurate and comprehensive records to be kept of volunteer performance and participation.

It is not without its critics, however. Some volunteers feel that the approach is overly bureaucratic and antithetical to the spirit of volunteering. Recent research (not yet published) (queried by C Spence – may be a small study by Institute of Volunteering Research.) by the National Council for Volunteer Organisations (NCVO) shows that the number of volunteers who dislike this approach for various reasons is in the majority (52 per cent of those polled). For this reason, the NCVO is interested in looking at some of the more flexible approaches to volunteering that the heritage sector deploys.

### **Service delivery**

Service delivery is a specialist area of volunteer deployment, which is widely used by the social services and caring charities.

There are two quite distinct ways in which service delivery can be made to work. In one case, volunteers and professionals work together to undertake contractual services, such as delivering Meals on Wheels, providing holidays for children with special needs, or running respite homes for the chronically sick. Large charities engage in such activities for a variety of reasons, including income generation, social action, and the opportunity to give volunteers the chance to make a real difference to people's lives, which is often their primary motivation for engaging with the charity.

Within the heritage sector, an example of this kind of service delivery is the use by English Heritage of re-enactment groups. All the re-enactment groups that stage living history events at English Heritage properties are hired for a fee and have contractual commitments. The groups themselves are made up of volunteers, however, and the fee paid to the group is used to underwrite such expenses as costumes, props, research, travel and accommodation, rather than the payment of wages or salary.

The other form of service delivery involves an organisation taking a group of volunteers to undertake work that might otherwise be done by paid contractors, in order to give volunteers an experience they might not otherwise be able to access.

An example from the heritage sector is the work of the National Trust in taking giving work opportunities to young offenders and probationers that will help them obtain employment. The National Trust views this kind of work as fundamental to its social inclusion objectives.

Such schemes work best where there is a clear gain on both sides: where the National Trust has identified a project that needs to be undertaken, and where relatively unskilled volunteers can provide a very effective alternative to employing contractors; and vice versa, where the work is of a kind that helps the volunteers develop specific technical and social skills that are appealing to a future employer.

Another recent example of volunteering with a social benefit comes from English Heritage where the parks and gardens section has begun to identify a range of tasks that can be undertaken by volunteers. At Eltham Palace, ex offenders and long-term unemployed people and New Deal clients (job seekers) have been given the chance to take Royal Horticultural Society training courses to develop horticultural skills. Those in danger of drifting and rootlessness have found a purpose in life and have gone on to gain their first proper job as a result of this scheme. English Heritage now intends to offer more such opportunities at its gardens throughout England

### **Working holidays**

Working holidays are organised to great effect by the National Trust (through its Acorn Camps), the British Trust for Conservation Volunteers(BTCV) and Cathedral Camps, often in association with the Youth Hostels Association, the Ramblers Association or the Duke of Edinburgh's Awards Scheme.

The National Trust, for example, runs 470 separate projects a year, and calculates that the value of volunteers on working holidays is £1,175,000 – money that would otherwise be spent on paying contractors. BTCV involves 95,000 people every year in carrying out conservation work valued in excess of £1 million. The participants are often young, and they offer an opportunity for a first venture out of the family nest, having fun whilst doing something worthwhile, gaining life skills and new friends in the process.

BTCV organises conservation holidays in the UK and overseas as well as midweek and weekend volunteering schemes, and schemes for young volunteers aged 16 to 24 (4,000 volunteering places annually). Altogether these different schemes contribute 330,000 work days to conservation, most of which is focussed on the natural environment and wildlife, but this often has important benefits for the historic landscape as well. The BTCV also works with and provides accredited training to over 10,000 unemployed individuals.

Those who operate such schemes feel strongly that there is scope for expanding such schemes, to involve people from a wider range of backgrounds, to recruit leaders and volunteer managers from a wider range of backgrounds and to give opportunities to students in their gap year or in the long summer between completing GCSEs and starting the AS and A levels.

### **Contributing to access**

Volunteers play a vital role in enabling access to heritage sites and museums, acting as meeters and greeters and improving the enjoyment and understanding of visitors by acting as guides, room stewards and interpreters. They also help with physical access and mobility, for example by running fleets of buggies for disabled visitors.

The National Trust relies heavily on access volunteers: for example, the average property requires forty room stewards a day working on a rota to open the property to the public. Because of this dependence they are experimenting with various methods for recruiting volunteers, involving them in the Trust's wider work, encouraging them to learn from each other and from

visitors, encouraging feedback, and finding out what they can give to the organisation in terms of time and skills.

One model that the National Trust is studying is the American approach of 'docent' volunteering. Docents ('teachers') don't just impart knowledge, they also learn from other docents in the group and from visitors and undertake structured learning programmes.

One example is the group of sixty staff and volunteers who serve as guides at Fountains Abbey who have formed their own docent group. This not only enables new guides to learn about the history of the abbey and its landscape – they have now become so involved in the site that they have begun to go further and invite guest speakers to talk to them – but they also undertake their own original research. In this way, volunteering and learning coincide. This would make an interesting case study for future research. Interestingly, the group is self-perpetuating, as new volunteers are coming forward all the time as soon as they hear about the project – they want to be involved.

Such activity is not just for the benefit of the volunteers themselves: informal feedback from visitors suggests that the degree of interaction between visitor and volunteer can be a very significant factor in the level of visitor satisfaction, and the likelihood that they will think well of the organisation and make a return visit to the same site or another in property in the same organisation's guardianship.

### **Professional and technical volunteers**

Whereas casual volunteers can be defined as people who volunteer their time to an organisation and who are willing, by and large, to be deployed in whatever role the organisation requires, the historic environment sector also has a very high number of volunteers who become involved in voluntary projects as a way of acquiring, using or developing specific skills.

Many of these volunteers are members of specialist societies concerned with war memorials, church organs inland waterways, historic railways, archaeology, industrial archaeology, gardens, historic buildings, or the decorative arts. Some are even more specific and are concerned with buildings of a particular period, such as Roman or medieval archaeology, Victorian or Georgian or Modern architecture.

Members of these bodies range from the leading academics and specialists in their field, to interested amateurs, from professional practitioners who work as full-time archaeologists or conservationists or architects, to people who, having studied archaeology or architecture at university, now work in different fields but who maintain an active interest in their former specialism.

Some of these organisations were founded and are run entirely of volunteers, whilst others have a small full-time staff providing a secretariat that organises activities, events and a programme of training, publications and lectures. Full-time staff also serve as case officers, fund raisers and campaign managers, for a central purpose of many such organisations is the preservation, sustenance and protection of their object of study – whether that be windmills or non-conformist chapels, thirteenth architecture or churchyard memorials. Very often, the staff of such organisations are paid below market salaries for the work that they do, and they often undertake voluntary work in addition to their paid work by taking on a range of tasks that are additional to their paid employment. Equally the members are often highly skilled individuals who freely contribute professional expertise or technical knowledge that commands a high price in the economic market.

These organisations play a unique and vital role in our national life, as the passionate guardians and watchdogs of the historic environment in all its richness and varied manifestations, as

participants in the planning process campaigning against destructive change and in favour of integrity and sustainable reuse of historic buildings, as people who willingly take on Herculean preservation and fundraising tasks.

### **Employee Volunteering programmes**

Employee volunteering schemes enable employees to take time off from work to undertake voluntary activity without loss of pay. The degree of employee involvement ranges from one day a year, to lengthy periods of secondment of between a month and a year. For the employee, such schemes are fun and can offer a welcome break from the daily work routine, but also the chance to develop new skills and enhance existing ones. The employer benefits from building skills and morale in the workforce, demonstrates commitment to the wider community and builds important partnerships with business and the public sector.

Such is the demand for placements on such schemes that a group of environmental organisations – the National Trust, BTCV, RSPB, YHA and The Wildlife Trusts – set up a new Employee Volunteering Project initiative in 2001. EVP is backed and funded for by the Active Community Unit and is designed to increase the opportunities for corporate and public sector organisations to contribute to the community, to the environment and to offer development opportunities to their staff.

Projects on offer include those for groups and individuals and include team projects lasting from a single day to several days – perhaps as part of a residential visit, or linked to conference activities.

An example from the National Trust is the group of 300 employees of International Distillers and Vintners who held a management training course at the Royal Agricultural College in Cirencester. With funds supplied by the employer, the Trust provided tools, materials and training for its executives who spent a day in competitive teams rebuilding dry-stone walls on the Trust's Ebworth estate in the Cotswolds. Participants in the week-long course are now said to 'remember nothing of the course except for their wall-building exploits'.

Under EVP, employees can also be seconded to help with a specific project, from a week-long research assignment to a two-year full-time management role. Secondments of varying duration up to three years are made available, full or part-time, as are shorter placements of interest to individuals who are keen to focus on delivering a specified piece of work, for between one to twelve months, full or part-time. Opportunities also exist for individuals to take part on a day release basis as part of a business graduate development programme, or for groups to work together as a new team.

Another example from the National Trust is that of Lynn Hutchinson, currently working for the Trust on a two-year secondment from the Inland Revenue. Lynn's new role will be promote and link the Employee Volunteering Programme to internal Inland Revenue strategies, aiming to identify secondment and training opportunities for Revenue staff from within the National Trust and partner organisations and encourage staff to use the programme.

Inland Revenue employees are already entitled to one 'Volunteers Day' a year to take part in voluntary activities. If Lynn can encourage a large percentage of the 70,000 Revenue staff to use their Volunteers Day on the EVP, the impact will be significant. The possibilities are endless, through team-building events for groups, and management development for individual Inland Revenue employees.

Further information and case studies can be found at the National Trust's website: [www.nationaltrust.org.uk/employeevolunteering](http://www.nationaltrust.org.uk/employeevolunteering).

## **Trusteeships, committee work and management of organisations**

It is easy to forget that unpaid committee members and trustees direct the policy and strategy of almost every organisation in the heritage, including the National Trust (through its Council and Regional Management Boards) and English Heritage (through its Board of Commissioners).

There is no definitive figure for the number of heritage-based trusts and charities in England but a search of the Charity Commissions database reveals that there are 416 charities registered in the UK with heritage, preservation or conservation as part of their name or their charitable purpose (about half of these are building preservation trusts). Assuming an average of five trustees per charity, giving up a day a year of their time (to attend four two-hour meetings a year, including the AGM), trusteeship accounts for at least 2,080 days of voluntary input.

## **Protest groups, campaigners and activists**

Nothing galvanises volunteers into action more readily than a threat to some aspect of their life that they value. Recent examples include local groups campaigning against the governments plans to build new airports and to expand capacity at twelve others with new runways and facilities, and plans to expand the production of blue lias lime at Appledore quarry in Somerset. In both instances, campaigners sought to protect aspects of the natural and historical environment from perceived harm. No attempt has been made to quantify the value of this form of voluntary action on the grounds that its is essentially ephemeral, but examples do exist where campaign groups have been turned into permanent bodies making a positive contribution to the heritage.

One such example is the groups of protesters who formed ten years ago when English Heritage took over the management of the Kenwood estate. Campaigners who had grown used to the estate's lack of management protested against operations that included tree surgery and grass mowing on the grounds that it was destroying a semi-wild habitat. English Heritage invested considerable resources in explaining their plans to the local community, with the result that some of those original protesters now belong to an organisation called Heath Hands which undertakes voluntary maintenance work on the estate.

## **Conclusions**

To sum up, the range and flexibility of volunteer opportunities in the heritage sector are a great strength. The sector has a relatively flexible approach to volunteering by comparison with other sectors, and this flexibility is a positive attraction for some kinds of volunteer. Another strength is the sector's ability to attract volunteers with a high degree of professional or technical skill.

By contrast, some heritage organisations have taken the first tentative steps towards working with socially excluded groups, such as convicted prisoners and the long term unemployed; though the numbers involved at present are very small, the success rate at present looks high, and this is an area that deserves further study and encouragement.

Similarly, the Employee Volunteering Programme, run by the National Trust et al, offers a very interesting and potentially fruitful model for the sector as a whole, and it will be interesting to see how well this scheme develops, and what happens to it once Active Community Unit evaluates the programme in 2004.

### **SECTION 3 PROFILING THE VOLUNTEER**

This section addresses question about the kinds of people who do voluntary work and their motivation. It looks first at the national picture for all types of voluntary activity and then asks whether the heritage sector conforms to the national picture, or whether there are differences.

Much of the evidence gained for the latter part of this section came from interviews with people who work with volunteers. None of the organisations interviewed had records on which to base their statement about volunteers so this section does not pretend to be definitive or objective basis.

Nevertheless, it presents a very interesting and challenging picture of volunteering in transition – most significantly everyone agrees that a change is taking place, though different people and organisations have different views on what the changes imply and what action needs to be taken as a result.

#### **The National Survey of Volunteering**

The most comprehensive source of data volunteering currently available for the UK is the *National Survey of Volunteering* carried out in 1997 by the Institute for Volunteering Research (and due to be updated with a new survey to be conducted during the latter part of 2003 and the early part of 2004).

The following points have been singled out from this comprehensive report as being the most salient for the heritage sector.

This study defined 'informal' volunteering as: 'any activity which involves spending time, unpaid, doing something that aims to benefit someone (individuals or groups) other than, or in addition to, close relatives, or to benefit the environment'.

Under this very broad definition, baby sitting, looking after a pet for someone or helping them with household chores, giving advice or helping with form filling, were all counted as examples of volunteering. It is therefore not surprising that 82 per cent of respondents said they had taken part in some form of volunteering during the previous year.

The number of respondents involved in 'formal' volunteering activity (carried out for or through an organised group of some kind) the figure was lower but still impressive at 48 per cent (equivalent to 21.8 million people).

A third of respondents claimed to be regular volunteers, and the average time spent in volunteering activity was a massive 4.05 hours for formal volunteering and 1.3 hours a week for informal.

The survey looked at a wide range of demographic indicators – age, sex, education, ethnicity and geographical location of volunteers – and concluded that:

- men and women are equally committed to volunteering
- the extent of volunteering varies only slightly with ethnic origin (49 per cent of white people volunteer, compared with 41 per cent of black or Asian)
- volunteering by young people aged 18-24 and 25-34 is low and falling fast (from 55 per cent in 1991 to 43 per cent in 1997 with a significant drop in the number of hours committed) – the survey was not able to prove whether this was the result of a declining interest in the principles of volunteering, or to reduced opportunities and/or time availability, but informal feedback suggested that young people were held negative views about volunteering unless

they could see some personal benefit, in the form of learning new skills or helping with finding a job

- whereas volunteering by the active newly retired (aged 65-74) has increased; they spend more time in voluntary activity than any other age group (45 per cent of this age group now spend an average of five hours a week volunteering, up significantly since the last survey in 1991); the report concludes that 'the expanding third age is a rich new seam to mine for recruits'
- volunteers were more likely to be in higher socio-economic groups, better educated, earning more, and with their own car. Volunteering was lowest amongst the poor, amongst the unemployed and amongst people with transport difficulties.

Despite these impressive figures, the 1997 survey showed a drop in the numbers of people involved in volunteering of 1.4 million (3 per cent) since its previous survey (carried out in 1991).

Sport, education, religion, health and social welfare attract the greatest levels of formal volunteering activity. Respondents were asked which of the following types of causes they had supported through formal volunteering activity in the previous twelve months (the percentage figure represents those who said yes).

Health and social welfare	57 per cent
Children's education	39
Care of elderly people	37
The environment/animals	36
Religion/church	34
First aid/safety	29
Sports	20
Youth clubs/activities	17
Local community groups	14
Citizen's groups	10
Politics	5
Justice/human rights	5
Adult education	2
The arts	8

The types of activity they undertook were as follows:

Organising/helping to run an event	34 per cent
Giving advice/counselling	29
Raising money	25
Visiting people	25
Transporting	18
Representing	11
Secretarial/clerical/admin	9
Committee membership	6

The main reasons for becoming disaffected with volunteering were given as 'the organisation didn't know how to cope with volunteers or use them positively, the work was boring, your help was not really wanted, you were not appreciated, and you ended up out of pocket because of the expense involved.

The overwhelming reason given for not volunteering was lack of time, but other prominent reasons given were the lack of information about volunteering opportunities and the fear that one would not fit in – that volunteering was the 'prerogative of middle-class, blue-rinse do-gooders'.

The perceived benefits of volunteering were given as pure enjoyment of the work, the chance to meet people and socialise, fulfilling religious or philosophical convictions, learning new skills, broadening one's experiences, gaining a sense of achievement and fulfilment, and gaining a position in society.

On the formalisation of volunteering, most said that they operated outside formal management systems (such as interviews, job descriptions and appraisals), and thought that such 'bureaucracy' would deter people from volunteering.

More recently, the Institute for Volunteering Research has found that attitudes to the formalisation of volunteering were hardening, and that many volunteers actively disliked and were deterred by such procedures, which they felt to be intrusive and antithetic to the spirit of volunteering (*A choice blend – what volunteers want from organisation and management*, 2003).

### **Heritage volunteers**

What sorts of people do voluntary work in the heritage and does the picture vary from the national norms? The answer to these questions holds very few surprises and very much depends very much on the type of volunteering scheme on offer.

Young people, for example, are more likely to be involved in working holidays (though there is no age limit to many of the schemes run by the National Trust or BTCV). People in their thirties are more likely to be involved in employer-supported volunteering, whereas people in their forties and fifties are more likely to be on management committees and boards of trustees. A very high proportion of people involved in support work, access and casual volunteering for bodies like the National Trust are retired people with time on their hands looking for ways to fill their time doing something that is both useful and enjoyable.

There is, in other words, a clear life cycle to heritage volunteering, and organisations that are adept at recruiting volunteers have designed schemes that will appeal to different people at different stages in their lives.

Besides these age distinctions there are several other discernible patterns. Some types of voluntary activity attract more women (a very high proportion of NADFAS membership is female), while other activities (industrial archaeology and transport heritage) tend to be male dominated.

Some volunteer managers commented that there was a north/south divide: that volunteers were harder to find in the north where there was a prevailing ethos that 'that's what I pay my taxes for' and 'volunteers steal people's legitimate jobs'.

As far as ethnicity was concerned, volunteer managers said they wished they could recruit a better mix of volunteers, and that the best way to achieve this was to recruit trustees and managers from a diverse background, because they would then spread the word amongst the members of their own community and serve as a role model.

### **How do they get involved?**

Again, there is something of a life cycle pattern to this question, in that younger people tend to become involved in volunteering because of some external impetus – at the suggestion of friends, teachers, parents or employers, for example – while older people tend to become involved as a result of a deliberate and personal choice.

There is an important link between these two groups, however. People who are exposed to the heritage at an early age tend to return to it as volunteers later in life, which is one reason why it is so important to give young people the opportunity to participate in heritage work.

The demands of raising a family, earning a living and building a successful career tend to use up what energy and time people have until their mid forties. People who then make a decision to get involved with the heritage do not suddenly develop that interest (though television programmes such as *Time Team* do encourage neophytes); instead it is usually something that they have long wanted to do, based on experiences they had at a much earlier age – and often in their formative teen years. Many of today's movers and shakers in the sector were introduced to the heritage by enthusiastic teachers, or owe their first taste of the heritage to teenage experiences of participating in archaeology, buildings surveys or field work.

This avenue is one that has become more closed in recent years with the professionalisation of heritage activity, but is one that could be revived, through the Citizenship aspects of the core curriculum. The Tomlinson Report on the future of education, which proposes a new baccalaureate (or diploma) system, proposes that every student should spend at least 45 hours a year in some form of approved community or volunteering work, and this again represents a great opportunity for the heritage sector to create entry points for young people.

There are several other pathways that lead people to become a heritage volunteer. They include membership of a heritage organisation that encourages them to get involved and being encouraged to get involved by existing volunteers, through their children, school, colleagues or workplace.

Deliberate recruitment campaigns also play an important role. Several heritage organisations use social events focused on a heritage site to generate interest from potential volunteers. National Volunteers Week (the first week in June) is used by many organisations to highlight the work of volunteers. Larger organisations advertise for volunteers in local and national newspapers (eg *The Guardian* on Wednesday) or specialist magazines.

Experiments at Waddesdon Manor suggest that the existence of a Volunteer Co-ordinator can make a major difference to the success of volunteering at property level, and that such posts (which can themselves be filled by a volunteer) are critical to the creation of a group of well-motivated and self-sustaining volunteers.

### **Why do people volunteer?**

What do volunteers get out of their work? What motivates them, what expectations do they have and how does it change their lives?

Whether the volunteers are ex offenders, company executives, Duke of Edinburgh Award participants or young people on their first holiday away from the family, the same basic principles apply: a win/win situation is brought about by careful planning to ensure that volunteers undertake work that is of value to the charity employing them, but that is also of value to the participants.

Often the gain from the participant's perspective is social. It is an irony that employers such as the NHS or local government struggle to attract people into the caring professions or manual work, but that many people willingly undertake exactly the same kind of work as volunteers. Volunteers work with people with physical and mental health problems, or undertake backbreaking manual labour, such as scrub clearance or clearing blocked waterways. The difference is that the even the most menial work can be made enjoyable through social interaction, and this is often what motivates the participants in all sorts of volunteering schemes.

This feel-good factor, according to several of the people who manage volunteers, is critical to the future of volunteering. In the past volunteering might have been seen as a duty. The last generations to have been brought up with this ethos are now in their fifties and sixties: soon heritage bodies will not be able to count on a steady flow of volunteers who wish to put something

back into the community. Instead, volunteers will have to be persuaded that volunteering is all about health, fun and romance (the BTCV has already realised this and has had considerable success in persuading young volunteers into 'Green Gym' schemes on the grounds that this is a wonderful way to get fit whilst doing something interesting and useful).

Such messages work well with young people but could also be deployed to great effect on the active retired. Christopher Spence, Director of the National Centre for Volunteering, nevertheless believes that there is a rich mine of untapped resource here, and that the single biggest fear that retired people have is that they will become bored, lonely and depressed. For them, the opportunity to undertake useful work as a volunteer is a very real quality of life issue, essential to their health, happiness, and sense of purpose.

For many people, another important motivation is to acquire skills and experience. This is true of young people, for example, who are able to study for NVQ qualifications whilst undertaking BTCV voluntary work, or for RHS qualifications whilst working as gardens volunteers for the National Trust or English Heritage. It is also an important route into paid employment for graduates: the amenity societies, such as SPAB, the Georgian Group and SAVE Britain's Heritage have a long tradition of providing placements to graduates and interns wishing to gain hands on experience of case work or campaigning, as a way of building their CV and finding a first job in heritage management or a related career. Post graduate degrees often involve placements from 6 weeks to 3 months which heritage organisations can deploy, within certain parameters on specific projects, as 'volunteer' help to everyone's mutual benefit.

Even people who already have successful careers are able to gain new skills and perspectives from heritage volunteer work. Many of the skills that are developed through heritage work – teamwork, problem solving, empirical observation and deduction, understanding and interpretation, creativity and communication – are all highly valued skills for commercial life. The National Trust has found that there is a considerable potential for bringing skilled people into the heritage by offering opportunities to workplace volunteers, and this also represents a very promising source of future recruits.

Finally, there are many people who undertake voluntary work because they have time on their hands. Here there is a definite and discernible shift in demographics. According to Jenny Baker, Head of Volunteering at the National Trust, their volunteers used to consist of 'ladies of a certain age, income and class – above all, leisured – ladies who did not work'. Now there are not so many 'nice ladies of Cirencester with half a day to spare', and many more 'retired men with IT and accountancy skills, as well as people who are 'resting between jobs', looking for work, downshifting, early retired, recovering from illness or a nervous breakdown, or looking for something completely different to do in their working lives'.

Others agree that there are far more volunteers available now from this category, but Peter Lindesay, Chairman of the Association of Gardens Trusts, warns that it is not easy to persuade them to undertake voluntary work for two reasons: active retired people tend to pursue more selfish pursuits, such as travelling or buying and restoring a retirement home; and many also try to earn a living as consultants for several years after retirement because their retirement pensions do not meet their expectations of living standards.

For heritage bodies this is a challenge that can work in our favour. Jenny Baker of the National Trust is convinced that 'people are thinking much more strategically about the use of their leisure time – people build a portfolio of things to do with their spare time: they are much more self-centred. This isn't necessarily a bad thing if we can link volunteering with the idea of personal development, the achievement of personal outcomes. People are beginning to think of life as a personal journey. As volunteer managers, we have to lock into the aspirations that people have for their personal journeys: give them opportunities to realise their aspirations'.

Another shift that interviewees have detected is from the casual to the skilled volunteer. People are now less willing to offer themselves as volunteer fodder: 'here I am, tell me what to do'. Instead, they want to undertake tasks that stretch and challenge them, they want feedback on their performance, and they feel that they have a stake in the organisation by serving as a volunteer so they want us to listen to their views on how things can be done better.

### **What turns people off being a volunteer?**

As well as asking what sort of people do volunteer, it is equally important to look at the reasons that people give for not being involved in heritage volunteering work or for giving up once having been involved.

Among reasons given in the 1997 National Survey of Volunteering are: 'Bad organisation, boredom, loss of interest, you don't get asked to do the things you really want to do, your efforts aren't appreciated, you find yourself out of pocket, the organisation isn't going anywhere'

Volunteer managers interviewed for this research echoed these conclusions and all agreed that the biggest reason why volunteers become disaffected and vote with their feet is that the organisation hasn't invested time and resources in working out what it wants volunteers to do.

The biggest complaint amongst disaffected volunteers is that they are given menial and unsatisfying tasks, such as coffee making and photocopying, and that no effort is made by volunteer managers to understand their real skills. Volunteers are expected to conform to the old 'control and command' model – the military style / national service ethos, or the workplace model, whereby they are treated as raw recruits to be moulded and formed to the organisation's will – whereas volunteers want to contribute skills and expertise that they already possess.

Another reason for disaffection is the tension between local groups and their national bodies. In particular there is frequently resentment about the levy local groups pay to national head office. Fund raising is a difficult task that involves great creativity and energy, and local groups resent passing money to national/head office functions – they wish to use it all themselves, and there is a strong ethos of 'why do we need head office, what value do they bring?'

Allied to this is the dominance of individuals or groups at local level. Thomas Cocke, Chief Executive of NADFAS, says that volunteers at their best are powerful and even intimidating, because they take control and make things happen. This is undoubtedly a strength, unless the local groups becomes exclusive – and puts other people off from becoming involved. Some Chairs can run their local group as a personal fiefdom, and the danger signs are not evident for a long time, because strong single-minded people can often achieve remarkable results.

Martin Bacon of the Civic Trust echoes this finding and believes that is why training is critical for all officers of local Civic Trusts. Wrestling with the problem of an organisation that is skewed in its membership towards professional men in their fifties and sixties, the Civic Trust has instituted a series of training modules in recruitment, fundraising and project management to expose its most active members to best practice in these areas.

The Association of Preservation Trusts has also identified this problem amongst its own constituency, which is dominated by men in their late middle age, many of whom are 'more than slightly mad'. This image has its female equivalent in the 'blue-rinse do-gooding lady of leisure who undertakes voluntary work as a consequence of a middle class upbringing that stresses obligation and duty'. There is undoubtedly some truth in these caricatures, which extends beyond volunteers to the overall concept of heritage. This is a wider problem for the sector as a whole, to begin to associate heritage with fun and enjoyment – to make it cool and urban.

## Conclusions

Society is changing rapidly, and heritage volunteering is not immune from other pressures that are eroding the philanthropy and altruism that was a characteristic of post-war society for some fifty years. We simply cannot now assume that volunteering is a self-perpetuating phenomenon that can be left to take care of itself. A viable and sustainable future for most heritage organisations depends on taking a much more conscious and pro-active approach to volunteers.

Organisations that use volunteers have to be creative in order to maintain volunteer capacity. Organisations take risks by opening up to volunteers, because volunteers ask questions and want to have a say in decision-making. Some volunteers are very vociferous and well-informed and can be perceived as a threat, but their passion and commitment is also important.

The challenge for volunteer managers is therefore to develop more organic and inclusive approaches, where everyone – staff and volunteer – is part of a team, where the differences in role and status between staff and volunteers is far less marked than of old. As part of this ethos, volunteers expect recognition of the work they do, the effort they make and the skills they bring to the organisation, they wish to be given meaningful work to do and they want to be integrated into the wider activities of the organisation whose case they support. It is the belief of observers from the wider volunteering community that heritage bodies on the whole do this well, deserve applauding for this reason and can serve as a model for others.

## **SECTION 4 VOLUNTARY ACTIVITY IN THE UK: THE NATIONAL CONTEXT**

This section looks at the bigger picture of volunteering trends in the UK and asks what are the general trends and what are the drivers for change.

Interviews carried out for this research demonstrated that very few heritage organisations are aware of the broader context for voluntary activity in the UK, or of the scale and sophistication of the UK voluntary sector as a whole. This is a matter of some concern because there are potentially significant benefits to be gained from engaging in the activities of those national organisations that exist to help charities and voluntary bodies.

This aim of this section is therefore not just to set volunteering into its wider political, social and economic context, but also to provide a guide to the national/umbrella organisations that are active in the charities and volunteering field, with the aim of encouraging wider participation by heritage bodies in their activities.

The Government's strategy for volunteering is described, along with its emphasis on service delivery. Although the strategy is targeted principally at charities involved in delivering social services, there are nevertheless benefits available to the heritage sector from aligning with Government policy.

### **The economic importance of volunteering**

Volunteering in the UK is huge – so big that it is referred to as 'the third sector', a phrase that places charities and voluntary organisations on a par with the commercial/private sector and the public sector.

The main source for anyone trying to understand the third sector is the *National Survey of Volunteering*, published in 1997 by the Institute for Volunteering Research. This showed that:

- 22 million adults are involved in formal volunteering each year (ie 37 per cent of the UK population of 59 million (source for population figure: Office for National Statistics <[www.statistics.gov.uk](http://www.statistics.gov.uk)>)
- 90 million hours of formal voluntary work takes place each week
- The economic value of formal volunteering is in the region of £40 billion per year (ie 18 per cent of UK Gross GDP of £218 billion (source for GDP figure: Office for National Statistics <[www.statistics.gov.uk](http://www.statistics.gov.uk)>).

The Office of National Statistics, using much more rigorous definitions of volunteering activity, have produced somewhat lower figures. They estimate that the economic value of time given by volunteers is 'over £15 billion' (8.5 per cent of GDP), and that around £9 billion a year is donated to charities in cash.

- For every £1 that organisations spend on supporting volunteering activity they can expect a payback of up to 14 times that amount.
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### **The political importance of volunteering**

An activity that generates anywhere between 8 and 18 per cent of GDP is clearly one that has major political, as well as economic, implications. The fact that the Prime Minister regularly speaks on the subject of the volunteering ethos, and that he has made the keynote speech at the annual conference of the National Council of Voluntary Organisations, is an indication of just how high up volunteering is on the political agenda.

The UK Treasury and the Home Office have together undertaken much research and consultation over the last few years to try and understand and encourage volunteering, their stated aim being 'to make it as easy and attractive as possible for people to give money and time'. In particular, Alun Michael, MP (Minister of State for Rural Affairs), John Healey, MP (Economic Secretary) and Gus O'Donnell (Permanent Secretary, HM Treasury) all take a close and informed interest in third sector issues.

Following recommendation of the Treasury's Cross Cutting Review, the major departments of state have now all appointed 'Voluntary Sector Champions', senior civil servants who serve as the focal point for their department's activities with the third sector.

Politicians are mainly interested in what they term 'service delivery': the contracting of charitable bodies to deliver all sorts of vital services in the fields of mental health, prisoner rehabilitation, basic skills training for people with special needs, hospital visiting, care for the chronically ill or elderly, respite services, and so on.

A commentator with a cynical cast of mind could argue that the political appeal of volunteering lies in the fact that charities and volunteers are very effective at delivering vital social services at a significantly lower cost than public sector employees. An added attraction is that voluntary sector organisations are not unionised, which makes it easier to introduce new practices – and charities are often managed in ways that encourage innovation and flexibility.

Politicians themselves speak about the importance of volunteering as an essential characteristic of a healthy democratic society, whilst the Treasury argues that volunteering 'is a substantial social investment that creates social capital and makes a major contribution to national production'.

Charities themselves are becoming increasingly militant about being treated as a source of low paid labour. Stuart Etherington, Chief Executive of the National Council for Voluntary Organisations, has made several speeches over the summer of 2003 saying that 'Voluntary organisations should refuse to take on work for the public sector unless they are properly funded and paid a premium for their expertise'.

He wants charities to be much more robust in negotiating with local authorities to deliver public services to the community. A particular target is the 'unrealistically low figure of 10 per cent of total fees allotted to overheads and core costs'. NCVO wants to see full cost recovery as the norm.

### **Service delivery**

The two key reports that have been published by Government over the last twelve months (*The Role of the Voluntary and Community Sector in Service Delivery; A Cross Cutting Review*, (H M Treasury, September 2002; *Next Steps on Volunteering and Giving in the UK*, H M Treasury December 2002; copies of both can be downloaded from the Treasury's internet site at <[www.hm-treasury.gov.uk](http://www.hm-treasury.gov.uk)>) are very much targeted at an expansion in the scale and effectiveness of service delivery, and they set out the Government's key priorities in this area, which are to:

- nurture a culture of giving through such fiscal measures as Payroll Giving and Gift Aid (whereby charities can claim back the tax on voluntary donations)
- work with business and the voluntary sector to develop a Corporate Challenge, building on the practice of the best employers, who give their staff paid time off to engage in voluntary activities, or encourage their managers to work for charities on secondment for a period of time.

- review existing systems for recruiting and supporting volunteers, identify what works best and consider how government can best use its funding and support to promote an effective national and local infrastructure;
- focus the resources going to volunteering on disadvantaged communities, young people, employee volunteering and public services; pilot new ways of allowing young people from poorer backgrounds to have the once-in-a-lifetime experience of a Gap Year (the Young Volunteer Challenge – a new scheme to encourage young people from low income backgrounds to volunteer in community projects as they take a gap between school and college or training – began to be piloted in May 2003; under the scheme, young people will receive an allowance of £45 a week).

The body responsible within Whitehall for taking these priorities forward is the Active Community Unit, which reports to Fiona Mactaggart, MP, Parliamentary Under Secretary of State at the Home Office.

The total public sector support for volunteering is estimated to be in the region of £400 million per year. The Active Community Unit alone has a budget of £188 million ([www.homeoffice.gov.uk/inside/org/dob/direct/accu.html](http://www.homeoffice.gov.uk/inside/org/dob/direct/accu.html)) to invest over the period 2003 to 2006. In addition, the Government has set aside £125 million for a new investment fund, called Futurebuilders, to help voluntary organisations to modernise, professionalise and increase the scale and scope of their public service delivery work.

In part in answer to the sort of criticisms expressed by Stuart Etherington, the Futurebuilders fund allows for more flexible ways of financing charities as they strive to become more independent of grants and restrictive service delivery contracts. Futurebuilders funding options include loans, investment in longer term capacity building and modernisation initiatives, and in commercial income-generating projects (from the heritage sector, the National Trust's initiative to market a range of own brand foods could be considered an example of this type of activity).

The over-riding aims are to harness the specialist knowledge and expertise of voluntary sector service providers, and to capitalise on the charity sector's ability for innovation. The Government is prepared to fund high-quality schemes that exemplify good practice and that can deliver sustainable services.

### **Sources of information**

Voluntary and Community Sector Grants (<[www.volcomgrants.gov.uk](http://www.volcomgrants.gov.uk)>) is a pilot Government web-site which provides information for voluntary and community organisations on the grants available from four Government departments – the Home Office, the Department for Education and Skills, the Department for Transport, Local Government and the Regions and the Department of Health.

This site is the first stage of a larger project to develop a Voluntary and Community Sector Portal which will provide an online source for all information relating to grants that are available from Government to the sector, including access to grants through electronic application.

### **National umbrella bodies**

In developing its plans, the Government is not, of course, working in a vacuum. It has relationships with a number of national bodies, which serve as advisors and as partners in the national volunteering strategy. There is a bewildering number of organisations with confusingly similar sounding titles. This is the result of historic splits and divisions that has led to the formation of breakaway groups, who for some decades now have effectively been in competition with each for members and influence. such

## Volunteering England

In the spirit of modernisation encouraged by the Active Community Unit, all is about to change. April 2004 will see the formation of Volunteering England, headed by Christopher Spence, as a single national body for voluntary organisations. The merger will bring together three volunteering infrastructure bodies:

- **The National Centre for Volunteering ([www.volunteering.org.uk](http://www.volunteering.org.uk)):** founded in 1973, the NCV undertakes research on volunteers (through the Institute for Volunteering Research – which has its own website at [www.ivr.org.uk](http://www.ivr.org.uk)), provides publications (including *Volunteering* magazine) and information services, runs training courses and organises national events. It works closely with the Active Community Unit to promote opportunities for, and remove institutional barriers to, volunteering.
- **The Consortium on Opportunities for Volunteering:** which distributes Department of Health funding to health and social care volunteering projects.
- **Volunteer Development England (formerly the National Association of Volunteer Bureaux)**

The merger will put in place a strategic co-ordinated and sustainable infrastructure for volunteering at national, regional and local level. It will speak with a single voice for volunteering; and it aims to link research, policy, innovation, good practice and grant making in the involvement of volunteers.

At present, heritage is very underrepresented on such national bodies, with only the National Trust, NADFAS and the BAFM involved at all. Christopher Spence, the designated head of the new unified body, believes that there is a great deal of mutual benefit to be gained from the closer engagement of the heritage sector. The heritage sector would benefit from being networked in to developments in volunteering, training opportunities, research, and a large family of websites devoted to the recruitment of volunteers and participation in the annual National Volunteering Convention. The volunteering sector would benefit because it is too much focussed on health and social welfare; bringing heritage into the fold would be a powerful and important corrective.

### Volunteers wanted – methods of recruiting volunteers

The NCV and NCVO already work very closely with bodies whose purpose is to act as broker and matchmaker between people who want to volunteers and organisations that need volunteers. Again this is a field ripe for consolidation and merger, but the main players at the moment are as follows.

**Do-it ([www.do-it.org.uk](http://www.do-it.org.uk)):** Do-it is a comprehensive national on-line database of volunteering opportunities, branded in a way that is intended to be appealing to young people. It is run by YouthNet UK, the charity founded in 1995 by broadcaster Martyn Lewis, CBE, and headed by Fiona Dawe, OBE, and has a searchable database of more than 545,000 volunteering opportunities. Among environmental bodies who advertise volunteer vacancies on this database are Greenpeace, the Woodland Trust, Sustrans, Friends of the Earth, BTCV, the Groundwork Trust, the RSPB, the Wildlife Trusts and the National Trust.

**TimeBank ([www.timebank.org.uk](http://www.timebank.org.uk)):** TimeBank is another comprehensive web site for anyone considering giving time either in the UK or overseas. Its strength and its difference from Do-it is in running targeted campaigns to raise large numbers of volunteers for big national charities, such as the British Legion's annual Poppy Appeal, or for the Samaritans, or for Reclaim the Streets.

**Employee Volunteering ([www.employeevolunteering.org.uk](http://www.employeevolunteering.org.uk)):** this site's primary focus is on volunteering opportunities for people in full-time employment who get paid time off to engage in voluntary activities. It has links to Do-it, TimeBank and JustDoSomething, but is mainly a source

of 'how to do it' guides for companies or volunteers who want to set up an employee volunteering scheme.

**Common Purpose ([www.justdosomething.net](http://www.justdosomething.net)):** Common Purpose is an independent educational organisation which runs programmes for leaders, providing them with information, competencies and networks to help them become better leaders and to improve the way society works. Their website, [JustDoSomething.net](http://JustDoSomething.net), is a searchable online database of board level opportunities – from charity trustees to public appointments, magistrates to school governors – for senior level people who are willing to contribute their skills and experience to community and public life. It also provides advice, information and inspiration for people who want to start their own campaign or charity.

**Volunteer Development England (formerly known as the NAVB <[www.navb.org.uk](http://www.navb.org.uk)>):** runs a national network of 355 volunteer recruitment and advice centres in England – variously known as Volunteer Bureaux, Volunteer Centres, Councils for Voluntary Service, Voluntary Action or Volunteer Development Agencies. They serve as a source of information and advice about volunteering opportunities in their area.

Volunteer bureaux act as a volunteers' 'job shop'. They can tell you what voluntary work is available locally and put you in touch with local organisations. You can also discuss with them what you want to do and get advice. They place people with voluntary, community and statutory sector organisations, local businesses, self-help groups, Local Authorities, Health Authorities and Social Services Departments, and they offer advice/guidance, training and support to voluntary and statutory agencies. The network is in contact with over 80,000 volunteer-engaging organisations and it holds a databank of volunteering opportunities available locally (which they also supply to Do It).

Volunteer Bureaux in England are very diverse. Almost every major town and city in the UK is served by a local Volunteer Bureau, but they also exist in rural areas. They may be independent or based in other voluntary sector agencies. Volunteer Bureaux may be run by paid staff or solely by volunteers, and some are open every working day while others open for just a few hours each week. Each member subscribes to fundamental standards of service delivery as set out in the Volunteer Bureau Quality System. Every year they receive over 200,000 volunteering enquiries.

**National Association of Councils for Voluntary Service ([www.nacvs.org.uk](http://www.nacvs.org.uk)):** the National Association of Councils for Voluntary Service (NACVS) is the national umbrella for over 300 Councils for Voluntary Service (CVS) throughout England. Funded mainly by the Active Community Unit, NACVS is a membership-based organisation with a Trustee Board elected by its members.

CVS, in turn, are voluntary organisations set up, owned and run by local groups to support, promote and develop local voluntary and community action. Their members are made up of, and accountable to, grass-roots voluntary and community organisations. These range from small self-help groups to local branches of national charities.

Usually funded by the local authority and other local statutory agencies, there is a CVS working in almost every district and city in England. Individual CVS differ in character and size, although they usually work to the same geographical boundaries as the local authority. They also differ in name. Many are called CVS, while others might be called Voluntary Action or Voluntary Sector Council.

### **Other bodies**

Apart from these main players, there are several organisations devoted to specific sectors of society:

**Association of Chief Executives of Voluntary Organisations:** lobbies on behalf of the chief executives who run most of Britain's charities; runs excellent training courses for newly appointed charity chief executives; an excellent networking and problem sharing organisation – a substantial number of directors, general secretaries and chief executives of heritage bodies are members ([www.acevo.org.uk](http://www.acevo.org.uk)).

**The Prince's Trust:** The Prince's Trust Volunteers Programme offers 16–25 year olds the chance to take part in 12-week team-based programme of personal development training to enhance their skills and confidence. Young people join a volunteers team of up to fifteen participants, comprising unemployed people, people from Learning Gateway, people leaving care, young offenders, students and employed people sponsored by their employers ([www.princes-trust.org.uk](http://www.princes-trust.org.uk)).

**Student Volunteering:** gap year and vacation volunteering work ([studentvol.org.uk](http://studentvol.org.uk)).

**Youth Action Network:** dedicated to creating support and recognition for the voices, ideas and positive contributions of young people. Its programs are focused on improving citizenship, civic engagement and communities through youth leadership and positive action ([www.youthlink.org](http://www.youthlink.org)).

**The National Federation of Youth Agencies:** branded as The Youth Action Network, this is a membership organisation that provides training, information and guidance on recruiting, supporting and recognising the achievements of young volunteers, developing projects that are devised and led by young people, engaging young people in decision-making and encouraging young people into active citizenship ([www.youth-action.org.uk](http://www.youth-action.org.uk)).

**NCVYS:** the National Council for Voluntary Youth Services is the independent voice of the voluntary youth sector in England and consists of a network of over 150 national voluntary youth organisations and regional and local youth networks, supporting voluntary and community organisations that work with young people. NCVYS co-ordinates, through its members, 500,000 paid and voluntary workers who provide direct support to approximately five million young people ([www.ncvys.org.uk](http://www.ncvys.org.uk)).

**The Voluntary Arts Network (VAN):** the national body dealing with arts volunteers, with roles ranging from administration to fundraising to performing and directing ([www.voluntaryarts.org](http://www.voluntaryarts.org)).

**Media Trust:** matches the skills of media professionals to the needs of voluntary organisations ([www.mediatrust.org](http://www.mediatrust.org)).

**CSV GO:** offers *ad hoc* volunteering opportunities for busy people through one-day events. Activities include painting homeless shelters, planting trees, cleaning canals and painting murals ([www.gocity.org.uk/](http://www.gocity.org.uk/)).

**REACH:** specialises in volunteering opportunities for retired professionals and executives with specific skills and expertise ([www.volwork.org.uk](http://www.volwork.org.uk)).

**RSVP:** the Retired and Senior Volunteer Programme matches older people to volunteer roles ([www.csv-rsvp.org.uk/](http://www.csv-rsvp.org.uk/))

**Age Concern:** finds effective ways to make later life more fulfilling and enjoyable for older people; runs a network of 14,000 groups with 250,000 volunteers providing community based services such as lunch clubs, day centres and home visiting ([www.ace.org.uk](http://www.ace.org.uk)).

**National Council for Ethnic Minority Voluntary Sector Organisations:** campaigns on behalf of 10,000 Minority Ethnic Voluntary Sector Organisations (MEVS), to increase ethnic minority participation within the policy and decision-making framework, to build organisational and funding capacity, and attract professionals from within the ethnic minority community to sit on boards or serve as volunteers ([www.emf-cemvo.co.uk](http://www.emf-cemvo.co.uk)).

**Confederation of Indian Organisations:** support, advice and information for South Asian community organisations.

**National Coalition of Black Volunteering:** encourages black people to become volunteers ([www.blink.org.uk](http://www.blink.org.uk)).

**London Voluntary Services Council:** support, information and training for voluntary organisations in London ([www.lvsc.org.uk](http://www.lvsc.org.uk)).

**Community Matters:** the National Federation of Community Organisations is a nationwide federation of over 1,000 community associations. It promotes and supports action by ordinary

people in response to social, educational and recreational needs in their neighbourhoods and communities ([www.communtymatters.org.uk](http://www.communtymatters.org.uk)).

### **Current issues within volunteering**

In order for the heritage sector to understand and play a role within the larger voluntary sector, it is useful to have a sense of the issues that are being debated by volunteer groups at the moment, in addition to those already described earlier in this section. Further details of these and other topical issues can be found amongst the list of research bulletins available on the Institute for Volunteering website at [www.ivr.org.uk/bulletins.htm](http://www.ivr.org.uk/bulletins.htm).

**What constitutes best practice?** Research carried out in 1998 (*Issues in volunteer management*) shows that volunteering has become more formalised in recent years, with an increasing array of management systems and procedures.

Four out of five volunteer-involving organisations have a designated volunteer co-ordinator/manager or equivalent post. 85 per cent of organisations have a written volunteer policy or practice and procedures handbook. The majority of organisations also have equal opportunities and health and safety policies and make use of application forms and interviews for selecting volunteers.

Most organisations have systems in place for supporting (94%), supervising (90%) and disciplining (74%) volunteers. A majority of organisations have procedures for evaluating volunteers' work (59%), managing staff/volunteer relationships (55%) and moving volunteers to new tasks (54%), while over a third of organisations (36%) have procedures in place for counselling volunteers.

Most volunteer-involving agencies provide training both on the job (87%) and through training courses (66%). Almost a half of organisations (47%) offer their volunteers some form of accreditation or certification for their work or training accomplished.

More recent research (*What volunteers want from organisation and management*, 2003) shows that 70 per cent of volunteers are critical of the way they are managed and with the way that voluntary work is organised. Volunteering is seen as having over emphasised the professional/workplace model, which is no longer seen as an adequate response to the diversity of volunteers' characteristics, motivations and needs. In what has become something of a well-used phrase in volunteering research, 'one size does not fit all'.

Professionals in the sector are therefore very keen to develop new models and methods of volunteering management. Nevertheless, they don't envisage that all the aspects of 'workplace' or 'managerial' practice will simply be abandoned. Volunteers (especially older ones) might be resistant to paperwork and structures that make them feel like employees, but this can cut both ways: firstly the paperwork is increasingly required by law, by Health & Safety legislation and by insurance companies; and secondly, it can easily be used by management and volunteer as an excuse for lazy practices that militate against organisational efficiency and productivity.

A written and public record of obligations on both sides is basic good human resource management practice, helps the volunteer integrate into the culture of an organisation and enables everyone to understand more easily the thinking behind the organisation's use of volunteers. Equally evaluation is an important management tool that can help convey to the volunteer important messages about the way that their time and effort is appreciated, and for the volunteer to feed back ideas and contribute to the objectives of the organisation for which they work.

The crucial point about volunteering is that it is freely given and done without compulsion. Anything that abrogates the spirit of choice in volunteering endangers the willingness of people to go on doing it. What puts volunteers off is feeling used, not appreciated, not consulted and not accommodated.

Charities are now looking at a range of different models and are interested to know how the heritage sector deploys volunteers – hoping to find models of flexible thinking and for a satisfying and enduring volunteering experience, based on the deployment of particular volunteers in particular situations, rather than volunteers viewed en masse as ‘unpaid workers’.

Volunteers want their voluntary work to be well-organised but flexible. The current emphasis on flexibility in volunteering is a response to trends towards shorter term volunteering and takes account of the other demands on volunteers’ time, which affects both young and older people.

Volunteers want to feel welcome, secure, respected, informed, well-used and well-managed. Since they do not have the incentive of a pay packet, rewards must be supplied in other ways by the organisation. The task for volunteer management is to find the right blend: combining choice and control, flexibility and organisation, to be experienced by the volunteer as a blend of informality and efficiency, personal and professional support. This must take full account of the mix of characteristics, motivations and needs within the volunteer workforce; and the type of volunteering and context in which it is carried out. For the volunteering infrastructure as a whole, this suggests a blend of different management approaches and structural arrangements, rather than over-dependence on a single model.

**Professional standards and qualifications in voluntary work:** allied to best practice in volunteering, the Voluntary Sector National Training Organisation is in the process of developing National Occupational Standards and National Vocational Qualifications in three key areas of voluntary work: managing volunteers, fundraising and trustee working. Details are to be had on the VSNTTO website at <[www.vsntto.org.uk/nos.htm](http://www.vsntto.org.uk/nos.htm)>.

**Leadership training:** a joint report was published in July 2003 by the Association of Chief Executives of Voluntary Organisations and the National Council for Voluntary Organisations calling for the establishment of an academy for leadership training and research in the voluntary sector, and pointing to the fact that more than a third of volunteer managers and chief executives have no training for their role, and little time or resource to devote to developing leadership skills. A project director has been appointed to develop a business plan for opening the academy by April 2005.

**Barriers to volunteering:** three main barriers to social inclusiveness have been identified by the Institute for Volunteering Research: poverty, access, and the image of volunteering.

On the first, organisations that are unable or unwilling to pay out of pocket expenses are limiting the range of volunteers who are able to work for them; there is also a perception that volunteering disqualifies people from employment of incapacity benefits, which needs to be corrected.

On access, many people are hampered by a lack of information and access points to route them into volunteering. ‘Charities are pathetically old-fashioned in their marketing’, according to one sector leader. People don’t know how to access opportunities: the proliferation of sites and organisations is a barrier to many would-be volunteers.

Improving the image and appeal of volunteering to make it more visible and more ‘normal’ is an urgent issue in order to counter the perceived image of volunteering as the province of middle-class do-gooders and the belief that it is ‘boring, badly-organised, pointless and uncool’. This can be highlighting the variety of volunteer roles and publicising specific voluntary activities and opportunities. This should be done through promotional materials that are attractive and inclusive,

countering common misconceptions and appealing to people with different backgrounds, interests, motivations and degrees of commitment.

**What young people want from volunteering:** it is a misconception that young people are not interested in volunteering, but they do have a strong over-riding interest in skills development, training, work experience and accreditation as a route to paid employment – which demands specific types of volunteering opportunity, not often available under current models. The message from young people is that volunteering needs a make-over. It needs to improve its image, broaden its access points and provide what today's and tomorrow's young people need. Volunteering suffers from out-dated associations with worthy philanthropy and conjures images that do not appeal to the young. However, it is recognised as potentially offering opportunities to young people which are scarcely available anywhere else.

The acronym 'Flexivol' summarises the essential requirements of 16-24 year olds for:

- Flexibility (there has to be an element of choice in when, what and how they do their volunteering)
- Legitimacy (volunteering must seem 'normal' and 'cool'; many young people don't get involved for fear of being labelled as suckers or wimps)
- Ease of access (more information, more encouragement and easy access points to break down entry barriers)
- Xperience (young people want relevant and interesting experiences which will stand them in good stead in their personal and career development)
- Incentives (for example, tangible outcomes in the form of a reference or a qualification, to validate their experience and demonstrate their achievement to employers and others)
- Variety (in types of work, issues and structures, in the amount of commitment, the level of responsibility and the type of activity);
- Organisation (needs to be efficient but informal, providing a relaxed environment in which young people feel welcome and valued)
- Laughs (volunteering should be enjoyable, satisfying and fun. Since some of the competition for young people's time is from the attraction of a good time socially, it is a distinct bonus if volunteering also offers some laughs. While young people may not volunteer primarily for the social side, they are more likely to continue if they are enjoying themselves).

## Conclusions

The high economic and political value attached to volunteering means that there is money available for organisations that can deliver a part of the Government's objectives for volunteering efficiency, capacity growth and effectiveness.

For the heritage sector, a key opportunity exists in the Corporate Challenge objective: the sector has the capability to work with employers, including the civil service, who give their staff paid time off to engage in voluntary activities, or encourage their managers to work for charities on secondment for a period of time.

Another key challenge for the sector is come into the mainstream of volunteering; the sector will be welcomed with open arms, and there are clear potential benefits on both sides to heritage becoming a much more visible source of volunteering opportunities.

## **SECTION 5 ISSUES FOR THE SECTOR**

This report is a first step: it is far from being a definitive statement on the contribution that volunteers make to the heritage – for one thing, the data on volunteering has been derived from a very small number of organisations.

The headline conclusion of this report is that there are around 155,000 active heritage volunteers in the UK, and this may be a significant underestimate – it is based on the assumption that 6.5 per cent of the members of conservation organisations are active volunteers. The percentage in some cases is undoubtedly far higher – how much higher we may never be able to tell, since counting for counting's sake is not an especially productive exercise.

Even if the figure is higher, it will still be small as a proportion of the 22 million people in the UK who undertake formal voluntary work each year: 155,000 – is a mere 0.7 per cent of that number. As in so many other areas of national life, heritage seems not to be punching its weight.

### **Would more people undertake voluntary work for the heritage given the opportunity?**

Interviews with national volunteer agencies suggest that there is a large volunteer workforce ready and willing to engage with the heritage if given the opportunity. This suggestion is supported by anecdotal evidence from a number of sources – including the number of telephone calls that the BBC and Channel 4 receive after the broadcast of an edition of *Time Team* or *Restoration*, from people asking how they can get involved in the heritage in a hands-on capacity.

The NCV, for example, believes that there is a great deal of unmet demand for opportunities to work within the heritage sector from people who do not find social work very appealing. He believes that 'if you open the doors, you risk being trampled in the rush'.

### **What is preventing people from becoming heritage volunteers**

This study shows that volunteers play a crucial role in protecting, managing, interpreting and creating access to England's heritage, but that very few organisations have a conscious, structured, thought-through approach to volunteer recruitment and deployment.

Whereas all heritage bodies understand the importance of a healthy and growing membership, and may devote a large part of their staff activity to cultivating their passive volunteers through meetings, magazines or journals, these same organisations differ very markedly in the degree to which they recruit active volunteers, or encourage passive volunteers to cross the threshold into active volunteering. More often than not, the involvement of volunteers is the result of accident rather than design. To some, this is a matter of tradition and pride: Mic Aston in the Foreword to *Living Archaeology*, says that 'archaeology in Britain has always been nurtured by enthusiasm and commitment and not by formal structuring and clear career paths'.

While this might be true, it is also acting as a barrier, and it is undoubtedly the case that the *ad hoc* approach to volunteer recruitment that is preventing more people from becoming involved. However, the problem is not one that is unique to the heritage sector: poor marketing and a confusing proliferation of organisations and messages is a deterrent to volunteers in every sector (see the issues discussed at the end of section 4).

### **Does the sector need more capacity and could it cope?**

Some in the sector would argue that the sector does not need large numbers of volunteers; instead it has always relied on a small but effective body of people capable of undertaking skilled and specialist work. From fieldwalking and archaeological excavation to recording church monuments, vernacular or industrial buildings to conserving archives or furnishings or setting up

an Building Preservation Trust and finding an economic future for a building at risk – the sector's volunteers are not, by and large, people who walk in off the street and offer their time, to be used in whatever capacity the organisation requires. Even to be a successful room steward requires a willingness to undertake training and understand something of the history of the property – and in some cases, as at Fountains Abbey, to go further and undertake primary research.

The fact that the heritage sector already has a large body of skilled volunteers is illustrated by local archaeological societies: although the professionalisation of archaeology has undoubtedly diminished the number of opportunities for amateurs to work in archaeology, the differences that exist between amateur knowledge and professional knowledge are often not great: do the different communities of amateurs and professionals communicate with one another and trust one another? By and large they do, and it is a distinctive feature of the heritage sector that there is a great deal of fluidity between professional and volunteer – evident, for example, in the number of paid employees in the sector who began as volunteers.

### **Recruiting a new generation of volunteers**

Nevertheless, there is no room for complacency. The great problem acknowledged by everyone who works in the heritage is the sheer scale of the tasks they face versus the resources available. 'Capacity building' is a huge challenge, and the issue at stake here is not just whether the sector can make greater use of volunteers, but whether it can even count on being able to deploy and recruit a new generation of volunteers in the same numbers as in the past.

One reason for raising this question is that there are far fewer opportunities now than there were 25 years ago to become passionately engaged in the heritage, especially at a young age. Many of the professionals who now work in heritage were inspired to do so by a formative experience in their adolescence, whether they were influenced by an inspiring teacher, parent or other adult, or by participating in fieldwork. Even today, it is true that young people are more likely to do volunteering work if their parents are members of English Heritage or the National Trust than if they are not.

A key issue for the sector therefore is the nurturing of future heritage volunteers, giving young people opportunities for hands-on engagement with the historic environment through education and gap-year opportunities. As HLF Chairman Liz Forgan says in the HLF's 2002 Annual Report: 'we [need] to help everyone learn about their heritage, to have access to it, and to enjoy it ... we want to excite people when they are young, setting them on a path for them to follow for the rest of their lives, leading to pleasurable engagement in heritage activities and interests'.

### **Nurturing young people**

An opportunity for the heritage sector to do something tangible about this is becoming available through proposed reforms of the education system: DfES is increasingly emphasising that schools should plan cross-curricular activities into the term's work, perhaps using the historic environment as one large classroom, providing an opportunity to integrate history, geography, maths, literacy and science into one exercise. Citizenship studies offer another avenue for introducing adolescents to the issues of competing values (should we save the archaeology or build a hospital) and the economic, social and quality of life values that the historic environment brings to society.

The Tomlinson Report, published in July 2003, proposes a new diploma (or baccalaureate) to replace the existing post-14 exam system, and to gain that diploma, students will be expected to undertake a minimum of 45 hours a year of out-of-school voluntary activities. So opportunities do exist for the sector to engage the young, and leadership in this field is likely to come from organisations, such as the Young Archaeologists Club, Young Rescue, BTCV, the National Trust and English Heritage, who already play a leading role in education and youth volunteering.

The National Trust is particularly interested in developing the involvement of young people, including gap year volunteers and longer-term volunteering schemes for graduates doing heritage-related degrees. The Trust is aware that schemes for young people have to be designed with their specific needs in mind: they tend to prefer active conservation work, rather than standing in rooms helping visitors; ideally they want to gain a portfolio of experience, working at a range of different tasks to gain intense exposure over a short period of time; they are often quick to learn and don't want to be held back; and they want to be able to leave as soon as they can secure paid employment.

### **Employee Volunteer Schemes**

Beyond school, college and university, the next stage group of potential recruits to heritage volunteering consists of participants in employee volunteering schemes.

Schemes of this kind were first introduced in 1990, when Business in the Community held its first campaign to promote employee volunteering. Twelve years later, 74 per cent of FTSE 100 companies now have some kind of employee volunteering programme (source: the 2001 Home Office Citizenship Survey, 'Active Communities', published by the Voluntary and Community Research Section, Home Office, London, tel: 020 7273 2261).

The growth in interest in employee volunteering is characteristic of a much larger movement to encourage business and the public sector to become more socially aware and accountable. There is a growing realisation by all sections of society that an employer's responsibilities are much wider than simply providing jobs, and that maximisation of profit is not the only duty of business.

Employers are increasingly realising that they have responsibilities on many levels, and everything from employment records and human rights to environmental issues are under scrutiny – not just from pressure groups, but from shareholders, customers, and potential investors and business partners. The idea of integrating these issues with business operations and strategy is called Corporate Social Responsibility (CSR).

The Government has shown a great deal of enthusiasm for employee volunteering, and encourages all its own employees (ie civil servants) to undertake a minimum of a day a year as a volunteer. As recently as 7 July 2003, a campaign called 'The Corporate Challenge' was launched at 11 Downing Street with the aim of encouraging a real increase in the numbers of companies involved in communities. Tax incentives for employee volunteering are also being promoted – companies that allow employees to volunteer for a charity can deduct any costs incurred in connection with this (including salary costs) in calculating profits for tax purposes (see IR64 – <[www.inlandrevenue.gov.uk/pdfs/ir64.htm](http://www.inlandrevenue.gov.uk/pdfs/ir64.htm)>).

So far the heritage sector has been slow to realise just how useful such schemes could be, and only the National Trust has fully developed the potential for employee-supported volunteering schemes. The Trust's experience in this field might well represent a very valuable model for the rest of the sector.

Heritage ought to be able to score very highly in any measure of relevance to working life. The combination of intellectual challenges, physical effort and social interaction characteristic of much heritage volunteering ought to make it very appealing to volunteers. The skills that volunteers develop through heritage work – teamwork, problem solving, empirical observation and deduction, understanding and interpretation, creativity and communication – are all highly valued life skills, and as such ought to be especially valuable to employers.

Vice versa, the potential benefits to the heritage sector are huge: using employer supported volunteers is a way of tapping into the knowledge, skills and enthusiasm of the wider community.

It is also one of the fastest way of building social capital and getting people on your side, since most volunteers will willingly act as an enthusiastic advocate for your cause. The heritage sector's desire to put the historic environment into the mainstream of government and commercial thinking could well be achieved by the simple expedient of providing volunteer opportunities to senior civil servants and company executives.

An interesting precedent for this already exist in the work that the National Trust is doing with staff from the Inland Revenue (see section 4). A not dissimilar initiative has been set up by the Trade and Industry Secretary, Patricia Hewitt, for the 600 most senior staff at the Department of Trade and Industry. They have been instructed to spend a week a year working for a small business. The scheme has been set up by William Sargent, Chairman of the Small Business Council, which reports to the Prime Minister. The objective is for civil servants to gain a better understanding of the impact of the regulations they draft and of the challenges they face in complying with them. According to William Sargent 'It helps with policy making ... we should also like to see health and agricultural officials going into hospitals and farms'. To which the heritage sector might also wish to add 'and DCMS officials enjoying voluntary work for the organisations that they fund'.

### **Empty nesters and the active retired**

A third key target group for the sector consist of people who wish to do something purposeful with their lives once they cease to be so preoccupied with family and career building. The whole of the voluntary sector sees this as a key group with immense potential. Voluntary organisations can no longer count on the traditional motivations of altruism, duty and community spirit for a supply of willing volunteers. On the other hand, they are beginning to realise that people pass through a mid-life period when they appraise their journey through life so far and decide where to go next, thinking through what they have already achieved and what they still want to get out of life.

With this shift from duty to more self-interested motives for volunteering has come a different volunteering frame of mind. There are now more volunteers who have a clear idea of what they want to do and why, and fewer who are willing just to do anything. The old 'priesthood and laity' model of the past, whereby volunteers were expected to bow to the superior understanding of professional paid staff, no longer works.

In its place, volunteers wish to be treated as equals and as experts. They want to achieve personal development objectives through volunteering and they want their expertise to be recognised and to be used creatively.

Provided that they can see a personal outcome from volunteering, there are many people who are willing to contribute skills in law, IT and accountancy, in marketing and design, in journalism and personnel management, and in all sorts of technical skills (the National Trust, for example, has volunteers who are experts in IT, business planning, project management, cataloguing, collections care, health and safety legislation, building regulations, surveying, environmental control systems and energy conservation).

Heritage organisations have great potential to cater to this kind of volunteer because of the challenging and stimulating nature of much of the work that we do. In addition, older people with traditional skills can find a way of passing those skills on – this is a very great part of the appeal of the industrial and transport heritage sector to people who once worked in these industries and would like to feel that their hard-won knowledge is passed on to new generations.

But successful volunteering schemes do not just happen. They require a considerable investment of time, effort and imagination, and a clearly defined relationship between volunteer's skills and motivations and the kinds of work they are asked to do.

This is where the sector has not proved strong in the past – perhaps because of the paradox that very busy people are unable to obtain the help they need simply because they are too busy to devote the time and resources to the process of recruiting, training and deploying volunteers who could eventually take over much of the work.

Volunteer co-ordination and management is an important skill. It tends, however, to be given to nobody in particular, and so nobody in the organisation devotes the time necessary to fulfil the role adequately. Indeed, many managers see the recruitment and deployment of volunteers as a chore and a burden rather than as an opportunity. In addition, many heritage organisations do not see volunteer recruitment and management as a priority for scant resources, so the use of funds for a dedicated volunteer co-ordinator is not high on the agenda.

### **Possible solutions**

That self-defeating spiral has to be broken if the sector is to build new volunteering capacity and resources. Of course, it would be unrealistic to expect that this situation could be resolved overnight. The challenge facing the sector is to adopt a more *strategic approach* to this demand and create the *infrastructure* by which volunteers can be channelled into the sector in ways that enable everyone to win.

Opening the floodgates would be counterproductive, since the sector lacks the experience and ability to cope with a sudden influx of volunteers. In responding to the demand, the sector needs to invest to ensure that *good-quality volunteer opportunities* are created, that meet a real need within the organisation offering the opportunity and *that meet volunteers' expectations*.

As Jenny Baker of the National Trust puts it: 'the main reason we encourage volunteers is to get work done: there are lots of other benefits to the volunteering process, but lets not kid ourselves that the real purpose is to achieve certain tasks. It follows that the ideal situation is a *coincidence of interests* – where the task that we want to achieve matches the aspirations of the volunteer – and that means we have to be very creative in identifying tasks that can be motivating.'

Ideally, organisations need to be able to entrust the task of identifying suitable projects and recruiting suitable volunteers to a '*volunteers co-ordinator*'. The fact that so few organisations have the resources to do this partly explains why there are not more heritage volunteers. There is, of course, no reason why the volunteer co-ordinator should not themselves be a volunteer – recruiting such a person might well be the first step along the road to building volunteer capacity for many organisations.

Organisations that do not yet have experience of using volunteers also need to be able to acquire the necessary skills by learning from organisations that do have them. Another important step therefore is for the sector to begin to *participate in the work of national voluntary bodies*, such as the Centre for Volunteering. There is at present almost no contact between heritage bodies and those national bodies – hence there is no dialogue or participation in the critical debates, no learning from others, no awareness of best practice. *Heritage needs to be more mainstreamed into the volunteering sector*. Even receiving regular newsletters and perhaps attending the occasional meeting or training workshop will begin to sensitise the sector to issues and *best practice in volunteering* and open eyes and minds to how much is being achieved.

As a first step towards involving the sector, the Centre for Volunteering has suggested that Heritage Link might be able to take out corporate membership that would bestow membership benefits on all the organisations that belong to Heritage Link, thus enable the whole sector to be involved.

Finally, as a way of helping smaller organisations to obtain the benefits of volunteering, even if they lack the resources to appoint their own volunteer co-ordinator, it would be useful to establish

a sector co-ordinator by creating a new post – either as a standalone post or within an existing organisation.

That person's brief would be to serve as a *catalyst and broker between the heritage sector and the volunteering public*, whether they be individuals, or public and commercial bodies interested in employer supported volunteering schemes.

The co-ordinator would be expected to act as

- a champion for volunteering as a core practice within the sector,
- for propagating good practice,
- for identifying suitable tasks and projects within individual organisations,
- for building a portfolio of interesting and useful career-enhancing posts and projects,
- for working with employers to involve them in the scheme, and
- for creating an internet site that would be a one-stop shop for anyone looking for volunteering opportunities within the heritage.

Such a proposal has the support already of those people in the sector who are most involved with volunteers, and they are confident that funding for such a post would not be difficult to get from EU and UK Government sources, if a well-thought out business plan could be developed.

In the words of Jenny Baker, at the National Trust: 'we need a post to pull together the shared objectives and make something happen'.

### **Sources of funding**

The Active Community Unit is already funding the Employee Volunteering Programme run by the National Trust et al, and might therefore be prepared to fund a similar post with a wider remit, or to fund an expansion of the existing scheme to take in more organisations.

Although the Heritage Lottery Fund does not itself use volunteers, most of the projects that it funds have a high volunteer element. HLF takes very seriously its responsibilities towards the issues of access, management and training for volunteers, and it is the organisation's policy to 'use its revenue grants programme to support time-limited additional volunteer co-ordinator posts in particular organisations at strategic level on a country-wide or regional basis'. That being so, a case might well be made for the establishment of a sector co-ordinator with HLF funding'.

### **Partners**

There are several organisations already active in heritage volunteering and whose expertise is vital to the success of any new volunteering steering group for the heritage sector. They include:

The National Trust  
English Heritage  
NADFAS  
BAFM  
The Voluntary Sector National Training Organisation  
DCMS, Department of Culture Media and Sport  
CBA Council for British Archaeology  
BEN Black Environment Network

### **Conclusions**

Volunteers have been identified as an integral part of the heritage – so much so that the sector needs to think more clearly and consciously about their role and to develop a more positive partnership culture. To maximise the power of volunteers, heritage sector bodies need to:

- develop a strategy for involving volunteers in the work of the organisation
- appoint a volunteers co-ordinator
- expose the co-ordinator to training in membership recruitment, team building, project management
- identify tasks that could be done by volunteers and design those tasks to meet the different needs of volunteers: young people want short career enhancing opportunities that they can leave if they get a job; executives want to be able to use their professional and technical skills; retired people are rich in time and can undertake longer projects
- ask volunteers what they are capable of doing and where their skills and interests lie
- create the best match between the work needing to be done and the volunteers available
- but maintain an effective balance between effective management and flexibility.

The sector as a whole should also:

- engage more in national volunteering bodies and initiatives
- learn best practice from peers in other organisations and sectors
- appoint a volunteers co-ordinator for the whole sector to galvanise ideas and opportunities and act as a broker between those who want volunteers and those who have volunteer potential.

## APPENDICES

### **1. Project objectives**

The project was born out of a sector-wide desire to achieve a better understanding of grassroots support and involvement in the historic environment. This desire was first expressed in the *Power of Place* report (2001), which called for the heritage sector to 'initiate a detailed review of the needs and potential of the voluntary sector' (Recommendation 11, page30).

The call was then taken up by members of Heritage Link at their AGM in 2002. Members felt that Heritage Link would be the most appropriate body to undertake this research, since Heritage Link serves as the umbrella group for so many of the voluntary organisations in this sector.

The Heritage Lottery Fund has also indicated a keen interest in understanding volunteers and voluntary organisations better in order to fulfil one of its key strategic aims: 'to encourage more people to be involved in and make decisions about their heritage' (Strategic Plan 3.2.1), and 'to support projects that provide opportunities for people to offer their services as volunteers in caring for the heritage' (3.2.3). In fact, HLF's strategic plan as a whole could be seen as a volunteer's charter, with its strong focus on community involvement in caring for the heritage.

The importance of volunteering was further highlighted by the Historic Environment Executive, which decided in April 2003 that understanding 'the scale of the voluntary sector and work of volunteers' should form one of the main themes for the State of the Heritage Environment Report 2003 (SHER 03).

The research contained in this document, commissioned by English Heritage from Heritage Link, was the direct result.

## **2. Quantifying the sector**

Quantifying the sector is difficult because so few heritage bodies maintain accurate records of volunteer input.

Several different methods were used to elicit information on heritage volunteers, including:

- a questionnaire sent to all volunteer groups within the Heritage Link membership (see Appendix 2)
- interviews with key stakeholders (see Appendix 3)
- a literature review of existing knowledge of volunteering in the historic environment and of volunteering in the wider environment field, including other sectors and other countries, in order to distil existing knowledge and set heritage volunteering against the background of the broad figures about volunteering in the UK as a whole.

### **The questionnaire**

An attempt was made to gather reliable data by sending out a questionnaire to 115 leading heritage. These organisations include all of the largest and most active non-governmental heritage bodies in the UK and they were asked to answer the following questions:

1. How many members does your organisation have?
2. How much do they contribute per annum in total subscriptions or membership fees?
3. How much do they contribute per annum in additional voluntary donations, gifts and legacies?
4. How many days of voluntary work do your members contribute to your organisation a year?
5. Are these figures based on estimates or precise records?

Of the 38 organisations that replied, not one of them was able to supply accurate figures in answer to all the questions. The question that caused greatest difficulty was question 4, since no organisations seem to be recording this data on a systematic basis. Rather than supplying figures, many simply answered with statements such as 'huge numbers ... enormous numbers ... countless ... literally thousands' Several respondents commented that there is no real incentive for organisations to keep this kind of record unless they are involved in projects where time inputs count as match funding. Faced with so many pressures on their time and resources, heritage organisations do not regard keeping records on volunteer input as a priority.

Many struggled even to quantify their membership. Partly this was to do with the lack of monitoring, but partly it was to do with the complexity of the membership structure of many organisations. The CBA, for example, has 520 organisational members, and 10,860 individual members. Despite all these efforts, it has proved impossible to answer these questions with any degree of confidence or accuracy because almost nobody in the sector is logging voluntary inputs.

The National Trust is one exception to the general rule (along with NADFAS, BAFM and the Association of Gardens Trusts), but even the Trust questions the accuracy of its own figures suggesting that recent changes in their regional boundaries have led to the 'loss' of many volunteers from their statistics. They also point out that their published statistics only cover casual volunteers, and they do not include the many hundreds of volunteers who serve on National Trust management groups and committees, or work for the 200 local centres and associations. For this reason, the National Trust has commissioned the National Institute for Volunteering Research to carry out a mapping exercise in the autumn of 2003 to try and establish definitively how many people work for them in a voluntary capacity, what they do and what their contribution is worth.

What this means is that we still have no accurate figure for the extent of heritage volunteering in the UK, so that many of the conclusions contained in this report are extrapolated from a slender

base of known facts. In the continuing absence of compelling and objective data, it is difficult to convince decision-makers of the scale and popularity of the heritage sector. At present the sector depends to a very great (and perhaps dangerous) degree on anecdote for making its case.

### **Membership of heritage bodies**

From the 38 completed questionnaires and the figures that are published in publicity brochures and on websites, it is clear that heritage organisations can be categorised by their memberships into one of three categories:

- small (up to 500 members)
- medium (typically 5,000 to 10,000 members)
- and large (over 100,000 members).

In an attempt to arrive at an estimate of the overall membership of all 115 organisations to whom questionnaires were sent, they have all been classified into one of these three size categories.

Nominal memberships have then been assigned to each size, so that small organisations are assumed to have 500 members, medium-sized organisations are assumed to have 5,000 and large organisations are assumed to have 120,000 (such figures err on the side of conservatism, since it is known that several medium sized organisations (such as SPAB and the Waterways Trust) have 8,000 plus members, while some large organisations have memberships well in excess of 120,000).

The National Trust and English Heritage were omitted from the calculation, since both organisations are so large as to distort the totals.

The results of this calculation show a total membership of 1,149,000 made up of 68 small organisations (34,000 members), 31 medium-sized organisations (155,000 members), and 8 large organisations (960,000 members).

The average membership fee of the 38 (39) organisations replying to the questionnaire was £16. If that figure is multiplied by 1,149,000 members, the total membership fee value is £18,384,000.

### **Numbers of active volunteers**

We have already seen that the National Trust has at least 40,000 active volunteers, representing 1.34 per cent of its membership. If only 1.34 per cent of the 1,149,000 members of non-NT/EH organisations is involved in active volunteering, that adds another 15,396 active volunteers to the total. But we know this figure to be low, simply because one organisation – NADFAS – has 16,000 active members (20 per cent of its UK membership), and it is likely that members of organisations such as the CBA and the other national amenity societies are much more likely to be active than passive, because they have joined in order to support a cause rather than as a means of gaining free entry to visitor attractions.

Evidence for the Historic Gardens Trusts suggests that 6.5 per cent of members are active, and if this is true across the sector then the total number of active members is 74,685.

In addition the National Trust has 40,000 active volunteers (source: the National Trust Annual Report 2002), Heritage Open Days has 23,000 volunteers (source: SHER 2002, page 66) and there are 18,838 volunteers involved in opening up churches, cathedrals and historic houses to visitors (source: SHER 2003 page 50).

This very conservative estimate of the numbers of heritage volunteers therefore adds up to 155,583 people (0.26 per cent of the UK population); for comparison, the Meals on Wheels service has 110,000 volunteers.

The National Trust values the time of its 40,000 volunteers at £14 million. Assuming that 115,583 volunteers contribute an average of one day a year, valued at £100 a day, their contribution is worth an additional £11.56 million. Adding in the National Trust, that makes a total of £25.56 million (around 1.7 per cent of the total value of voluntary work in the UK using Office of National Statistics estimates).

It has already been shown that passive volunteers contribute another £18.384 million in subscriptions, to which can be added the £75.5 million that National Trust members pay in subscriptions and the £6.5 million that English Heritage members pay, making a total contribution of £125 million in work and subscriptions (excluding donations and legacies).

There are of course, lots of other assumptions that need unbundling from this aggregate figure: undoubtedly, some people are members of more than one organisation and some of the organisations surveyed are not solely or even primarily heritage bodies. On the other hand, the figure is very likely to be an underestimate, since many people do valuable voluntary work without being a member of any organisation.

#### **BAFM research in 1997**

The figures quoted in this report gain credibility from the fact that they are not dissimilar to the results of research carried out in 1997 by the British Association of Friends of Museums into the roles that volunteers play in relation to the heritage.

The headline results of that research, based on questionnaires and focus groups, were:

- More than 100,000 people volunteer more or less regularly for heritage institutions
- They are almost equally divided between males and females
- Half of them have been working with the same institution for more than five years
- 6 per cent are aged 35 and under, 27 per cent are aged from 35 to 59, while the majority – 66 per cent – are aged 60 plus
- They support more than 4,000 individual organisations, of which 15 per cent are completely volunteer staffed
- About 63 per cent worked for museums and galleries, 16 per cent for cathedrals and churches and 21 per cent for historic houses and gardens
- Around 50 per cent had roles involving dealing with the public. 20 per cent were involved in management functions, and 30 per cent had behind the scenes roles of a specialist or technical nature
- Some 77 per cent gave at least a day a week; the rest less often
- 40 per cent of volunteers had out of pocket expenses refunded; the remainder had no refund of expenses
- 99 per cent of volunteers said they were happy in what they did
- Most want to be taken seriously and do not want to be looked down on or treated as cheap labour, but neither did they want too much responsibility
- Most take pride in their role and want to share their knowledge but do not want to be involved in dealing with problems or emergencies
- Older volunteers are reluctant to be trained, to fill in forms or give the names of referees, all of which is associated with bureaucracy and old-fashioned drill; younger volunteers accept these matters without question
- They do want to be kept informed about the organisation's work and progress, and they want to be asked for their views.

### 3. Heritage organisations

The findings in this report were supplied by the following organisations or compiled from data found in their publications or on their websites:

Action for Market Towns  
Almshouse Association  
Ancient Monuments Society / Friends of Friendless Churches  
Ancient Sacred Landscapes Network  
Architectural Heritage Fund  
ASHTAV (Association of Small Historic Towns and Villages)  
Association for Heritage Interpretation  
Association for Industrial Archaeology  
Association of Diocesan & Cathedral Archaeologists  
Association of Gardens Trusts  
Association of Independent Museums  
Association of Local Government Archaeological Officers  
Association of Preservation Trusts  
Bath Preservation Trust  
Battlefields Trust  
Black Environment Network  
British Archaeological Association  
British Association of Friends of Museums  
British Association for Local History  
British Aviation Preservation Council  
British Bus Preservation Group  
British Institute of Organ Studies  
British Sundial Society  
BTCV  
Cathedral Architects Association  
Cathedral Camps  
Chapels Society  
Churches Conservation Trust (ex Redundant Churches Fund)  
Church Monuments Society  
Cinema Theatre Association  
Civic Trust  
Common Ground  
Conservation Foundation  
Construction History Society  
Council for British Archaeology  
Council for Independent Archaeology  
Council for National Parks  
Council for the Protection of Rural England  
Country Land and Business Association (CLA)  
Ecclesiastical Architects & Surveyors Association  
English Folk Song and Dance Society  
English Historic Towns Forum  
Folly Fellowship  
Folklore Society  
Friends of War Memorials  
Garden History Society  
Georgian Group  
Green Alliance  
Heritage Afloat  
Heritage Railway Association

Historical Association  
Historic Chapels Trust  
Historic Churches Preservation Trust  
Historic Farm Buildings Group  
Historic Gardens Foundation  
Historic Houses Association  
Historic Narrow Boat Association  
Industrial Buildings Preservation Trust  
Industrial Trust  
Inland Waterways Association  
Institute of Field Archaeologists  
Institute of Historic Building Conservation  
International Council on Monuments & Sites UK (ICOMOS UK)  
Landmark Trust  
Lutyens Trust  
Manx National Heritage  
Mary Rose Trust  
Medieval Pottery Research Group  
Methodist Church Property Committee  
Milestone Society  
Museums Association  
National Association of Decorative and Fine Arts Societies  
National Association of Re-enactment Societies  
National Council for the Conservation of Plants and Gardens  
National Council for Conservation-Restoration  
National Piers Society  
National Trust for England, Wales and Northern Ireland  
Nautical Archaeology Society  
Open Spaces Society  
Oxford Preservation Trust  
Phoenix Trust  
Pilgrim Trust  
Plantlife  
Public Monuments and Sculpture Association  
Prehistoric Society  
Ramblers' Association  
RESCUE - The British Archaeological Trust  
Round Tower Churches Society  
Royal Archaeological Institute  
SAVE Britain's Heritage  
Shoreditch Town Hall Trust  
Society for Medieval Archaeology  
Society for Post-Medieval Archaeology  
Society for the Promotion of Roman Studies  
SPAB (Society for the Protection of Ancient Buildings)  
Society of Antiquaries of London  
Subterranea Britannica  
Theatres Trust  
Tools and Trades History Society  
Transport Trust  
Transport 2000  
Twentieth Century Society  
Vernacular Architecture Group  
Victorian Society  
Vintage Carriage Association

Vintage Wooden Boat Association  
Vivat Trust  
Waterways Trust  
Wildlife Trusts  
WMF in Britain / World Monuments Fund in Britain  
Woodland Trust  
YHA (England & Wales)

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### **Questions put to stakeholders**

- how many volunteers do they use/are they aware of in their organisation?
- what these volunteers do?
- what is the average amount of time spent in volunteering?
- what sort of people volunteer?
- what is their motivation?
- what level of skill do volunteers bring?
- what is the ratio of volunteers to paid staff and how do you organise volunteers?

- are you aware of regional or other variations in volunteering (urban/rural?)
- do you perceive any changes in volunteering patterns over time?
- what are the main issues limiting voluntary activity in the sector?
- do you have views on whether barriers exist for certain groups and why?
- do you have plans to expand/modify volunteer activity in the future?
- do you plan any research in this area?
- would you be interested in contributing to a possible stage II of this research? What did they say?

#### **4. Who is doing what? The major players**

This list is not intended to be a comprehensive account of all the heritage projects run by or involving volunteers in England, but rather to give an indication of the diversity and scale of some of the more active organisations and their projects.

##### **National Trust**

- The National Trust is the sector leader in terms of the scale of its volunteer numbers, its participation in national volunteering bodies, its range of schemes and its placing of volunteering at the heart of the organisation's strategic plan.
- The Trust has an exhaustive manual of volunteering policy and practice, which all 300 NT managers have as a reference source, covering essential legal and Health & Safety issues as well as the broader principals and practice of volunteering.
- Employs 40,000 plus volunteers in over 150 different tasks, among which are:
  - Financial, clerical and admin assistant
  - Archaeologist
  - Education assistant
  - Environmental surveyor
  - Event manager
  - Fire surveyor
  - Fundraiser
  - Gardener
  - Garden steward
  - Holiday assistant
  - Inventory assistant
  - Literature co-ordinator
  - Minibus driver
  - Plant fair organiser
  - Plant recorder
  - Quantity surveyor
  - Room steward
  - Raffle ticket seller
  - Recruiter
  - Secretary
  - Speaker, giving talks on different aspects of the Trust's work
  - Translator
- Since their inception in 1967, the National Trust's Working Holidays (once known as Acorn Camps) have involved 80,000 volunteers in 7,000 holidays, undertaking work that is vital to the good stewardship of the countryside, from haymaking and fence mending to coppicing, path mending and dry stone wall building. Today, the Trust runs an average of 470 holiday projects a year. It is estimated that each project involves work that would cost £2,500 if the same work were undertaken by contractors.
- The Trust will undertake research in 2003/4 to look at: how many volunteers work for the Trust, what they do, where they are, what are the gaps and problems at individual properties, what are the management issues. The research will be conducted by Justin Davis-Smith, of the Institute for Volunteering Research.
- The National Trust is a key player in the Employee Volunteering Project (EVP) set up in 2001 by a group of environmental organisations – the National Trust, BTCV, RSPB, YHA and The Wildlife Trusts – with funding from the Active Community Unit. The scheme employs a manager with secretarial support and is designed to increase the opportunities for corporate and public sector organisations to contribute to the community. A report on the experience from the first 18 months off the scheme is due shortly.

##### **English Heritage**

- English Heritage is only just beginning to dip its toes in the water as far as volunteering is concerned, and is a potential sleeping giant – by analogy with the National Trust, its membership base of 445,000 is capable of yielding 5,783 volunteers (ie 1.3 per cent of the membership).
- Volunteers are already involved with English Heritage on a mass scale through the work of re-enactment groups. Even though English Heritage pays these groups to mount living history events at its properties, most members of re-enactment groups are nevertheless volunteers.
- The Parks and Gardens section of English Heritage has begun to provide volunteering opportunities to four or five long-term unemployed people at Eltham Palace. These opportunities are proving to be of great value to the participants, some of whom take RHS training courses to develop their horticultural skills and go on to find full-time employment in this field. The scheme at Eltham is recognised by the New Deal programme, which is a key part of the Government's strategy to get people back to work. It gives people the help and support they need to obtain work, including training and job preparation, without loss of benefits (source: Jane Cordingley, Head Gardener at Eltham Palace)
- Down House: volunteers used for room stewarding, guiding and interpretation; volunteers also run the kitchen gardens. 'We literally couldn't open Down House to the public without volunteers' (source: Toby Beasley, Head Gardener at Down House). In a similar vein to the National Trust docent scheme at Fountains Abbey, the Down House volunteers have become much more deeply involved in the house than simply delivering a set-piece account of the history of the house to visitors. They too have invited speakers to come and talk to them about newly discovered aspects of the house – for example, David Cone, an American academic who has talked to them about his research into the plant experiments that Darwin carried out at Down House.
- Other examples include Osborne House, Brodsworth, Richmond and Kenwood where volunteers are involved in a range of garden and landscape maintenance tasks, including acting as garden stewards as a subtle way of policing the garden and preventing plant thefts. Future plans include establishing a new garden at Portland Castle with the help of the inmates of Portland Prison
- Images of England: 1,300 volunteer photographers are involved in taking pictures for a national database illustrating listed buildings in England. Described by commentators as a 'superb project, that 'hits the button – matching needs to what volunteers want to do'. The website is also excellent, with profiles of volunteers written by volunteers and themed articles on specific building types.

### **The Council for British Archaeology**

- Despite concerns about the professionalisation of archaeology in England as a result of the demands of developer funded archaeology, under PPG16, there is still a very substantial amateur involvement in archaeology through local societies, period societies and excavation committees. The CBA serves as the umbrella body for this activity and has 520 organisational members, and 10,860 individual members. Adding together all the members of the 520 organisational members, the CBA's Director estimates his total membership to be 350,000 individuals. It is not known how many of these members are actively involved in archaeological fieldwork or research in a voluntary capacity, or how many of them also work in the profession.
- A superb example of volunteer-led research is the award-winning Defence of Britain Project, which ran from April 1995 to March 2002 under the auspices of the Council for British Archaeology. In that time, nearly 20,000 twentieth century military sites in the United Kingdom were recorded by an army of some 600 volunteers.
- The CBA has been undertaking its own research into the issue of boosting public participation in archaeology, and will be launching a major report on the subject at its annual meeting in Liverpool on 26 to 28 September. This is out now – is it ?

### **NADFAS**

- The National Association of Decorative and Fine Arts Societies, has a worldwide membership of 100,000, of whom 80,000 (over 330 societies) are in the UK. Of that UK number, around 20 per cent are active, while the remainder join principally in order to attend lectures and events and to receive the organisation's magazine.
- NADFAS works towards promoting and preserving the arts, and its activities include recording churches and their contents (Church Recorders), working towards developing the arts for the young (there are currently 35 Young Arts groups across the UK offering art and craft workshops, activity-based events, trips to museums, art galleries, theatres, historic sites and visits to artist s' studios) and maintaining lecture programmes and tours for members.
- NADFAS Volunteers do a range of work including: in-situ conservation of books, manuscripts, archives and maps; cataloguing documents and archival listing; documentation of objects including listing and transcribing; conservation of metalwork; cleaning and cataloguing arms and armour, medals and military silver; preventative conservation of textiles; replica work, creation of period costumes and methods of storage; guiding – for all types of groups; stewarding in museums, historic houses or gardens; gardens research and recording.
- As with the National Trust, NADFAS has a volunteer's handbook that contains a volunteering charter, code of conduct and guidance on a range of legal and Health and Safety issues, as well as specific. Thomas Cocke , Chief Executive, describes the purpose as being to encourage individual members and local groups to work to a common set of disciplines, without imposing uniformity.
- Although NADFAS has been perceived as an organisation for middle class women, it is working hard to attract a wider range of participants: for example, war veterans who are working on a joint project between NADFAS and the Friends of War Memorials.
- In other sectors, volunteering value is measured by the ratio of full-time staff to volunteers. NADFAS has a very high ratio, 18 full-time staff to 80,000 UK members, making a ratio of 1 to 4,444. An alternative measure is the cost of managing volunteers compared with the economic value of the work they do.
- NADFAS plans to carry out a skills audit during 2003/4 to find out exactly what skills and abilities members bring to the work of heritage conservation. The average value for the voluntary sector as a whole is that £1 of management time levers £7 worth of voluntary time. On p 20, you quote £14. In the case of the historic environment generally, there is the potential for this to be far higher, because of the skill levels of volunteers, which means that they require less direct supervision and undertake work of high economic value.

#### **The British Association of Friends of Museums (BAFM)**

- BAFM is an independent organisation established in 1973, for friends, volunteers and supporters in museums, galleries and heritage sites and has a membership of 200,000 friends and volunteers across the UK.
- Of these it is estimated that twenty per cent are active: there are some 2,000 museums in Britain, and most have between 1 and 20 volunteers working for them, while some smaller independent museums are wholly run by volunteers. On average each museum receives 55 hours of help each week from its volunteers.
- BAFM publishes its own Handbook for Heritage Volunteer Managers and Administrators, setting out a structured approach to the recruitment and management of volunteers, with a great deal of emphasis on induction, training, communication and evaluation.

#### **Building Preservation Trusts**

- In April 2002, there were 180 Building Preservation Trusts on the register of the members of the Association of Preservation Trusts, each with an average of 20 members.
- Collectively, these BPTs were involved in 75 different projects with financial assistance from the Architectural Heritage Fund and a further 256 projects were at the feasibility stage; this however is an incomplete picture, as some BPT projects are carried out without AHF assistance. Projects are being completed at the rate of 30 to 50 a year.

- Most have a purely local focus, but some of the more experienced trusts, such as the Spitalfields Trust, not only have a national remit, they also create employment because they retain their own direct labour force of people with specialist building conservation skills.

#### **Association of Gardens Trusts**

- Has 264 active volunteers undertaking research and recording work in order to create a national database of historic gardens, plus an additional 150 volunteers who work as trustees and officers of the 32 county gardens trusts in England (total membership is 6,500)

#### **Welsh Historic Gardens Trust**

- The Trust's Gateway project provides free visits for people with disabilities, children with special needs, the elderly, disabled people, the bereaved, carers, ethnic communities, families on low incomes and many other groups all over Wales – and soon the project will spread to the West Midlands, as part of a pilot to roll the scheme out nationwide. The project has set up garden visits for well over 10,000 people.

#### **Society of Antiquaries**

- Volunteers are used for room stewarding at Kelmscott Manor; 'without their help we would not be able to open the house to the public'
- NADFAS volunteers work every Tuesday on library conservation tasks.

#### **Industrial and transport heritage**

- In the limited time available for this research it was not possible to look in depth at the work of bodies concerned with industrial archaeology, railways, road, canals, floating heritage, et al; but the number of organisations involved and the scale of the membership of such bodies as the Waterways Trust, suggests that this is a very large and important sector involving tens of thousands of volunteers. For info: Anthony Streeten had some views on this. Many projects run by those made redundant – now falling off perch, leaves a vacuum.. future of many small orgs in doubt.

#### **Churches and chapels**

- The Church of England looks after 16,000 historic churches and 42 cathedrals. 13,000 of these buildings are listed by the Government as being of special architectural or historic interest. Some 40% of Grade I listed buildings (i.e. the most valuable historic buildings in the country) are churches. In addition there are more than 1,000 historic chapels in England which are also maintained by volunteers. All are treasuries of art, local and national history, culture, music and archaeology, as well as provide valuable (and often unique) habitats for plants and animals and green spaces for people to enjoy, while church organs and bells support living traditions of music and change-ringing.
- Over 31 million tourists a year visit churches and cathedrals every year, many of them from overseas.
- It is local voluntary church communities who meet most of the costs of looking after church buildings – every parish consultative committee in the land is a voluntary organisation. The cost of maintaining, repairing and running churches is over £100 million per year.

#### **The Civic Trust**

- There are nearly 1,000 Civic Societies in the national network, representing more than 300,000 individual members, all of whom are volunteers.
- These Societies are involved in a wide range of environmental improvement and regeneration projects. They raise awareness of excellence in development standards, architecture, conservation and Green Space management through the Civic Trust Awards scheme, through Heritage Open Days and the Green Flag Awards.
- They also campaigning for changes to national and local planning policy, for town centre improvements, urban regeneration, the reuse of derelict and vacant land and the protection and enhancement of the built heritage.

### **Friends of War Memorials**

- Friends of War Memorials is a charity dedicated to ensuring that war memorials are properly maintained and preserved.
- In furtherance of its objectives, FoWM has a network of 1,000 Friends who monitor the condition of British, Commonwealth and Allied war memorials and, where necessary, take steps to effect their maintenance and repair.

### **Heritage Lottery Fund**

- As the largest funding body in the heritage sector, the Heritage Lottery Fund has a major role to play in encouraging best practice in the use of volunteers and can apply leverage through the conditions that it attaches to the receipt of HLF project funding.
- On practical way that HLF encourages applicants to involve volunteers is by accepting volunteer labour as partnership, or matching, funding (valued at £50 a day for unskilled labour, £150 for skilled labour or technical services, and £350 for professional services – eg architect, surveyor, solicitor, accountant). HLF estimates that the value of volunteering inputs that it accepts as partnership funding is around £3.5 million a year.
- HLF sees the involvement of local volunteers as a significant means of ensuring the sustainability or local ownership of projects – they call this ‘supporting the heritage through volunteers’, which is subtly different from ‘supporting volunteers in the heritage’.
- Projects funded by HLF have involved volunteers in a wide variety of ways, but increasingly HLF is encouraging a shift in focus from projects that involve volunteers to projects that are instigated and delivered by volunteers.
- HLF can also give grants to support
  - new volunteer co-ordination posts in particular organisations or at the strategic level
  - the development of innovative site-specific volunteer programmes
  - discrete training packages within particular organisations to help them use volunteers more effectively.

#### **4. Other research and published sources (?and key websites?)**

##### **Existing research:**

*Volunteers in Museums and Heritage Organisations*, S Millar, HMSO 1991

*Voluntary Matters*, ed P Palmer and E Hoe, Directory of Social Change, 1997

*Working with Volunteers*, A Handbook for RSPB staff, RSPB 1997

*National Survey of Volunteering*, Dr J Davis Smith for the Institute for Volunteering, 1998 (further details from <[www.ivr.org.uk](http://www.ivr.org.uk)>).

*Essential Volunteer Management*, S McCurley and R Lynch, Directory of Social Change, 1998

*The Good Practice Guide (for everyone who works with volunteers)*, T Green, National Centre for Volunteering, 1998

*Volunteers in the Cultural Sector*, an Institute for Volunteering Research report undertaken in 2002 for Resource, downloadable from <[www.resource.gov.uk/documents/volunteers.pdf](http://www.resource.gov.uk/documents/volunteers.pdf)>.

*What young people want from volunteering* – an Institute for Volunteering Research report, published in 2002, available from <[www.ivr.org.uk](http://www.ivr.org.uk)>.

*A choice blend – what volunteers want from organisation and management* – an Institute for Volunteering Research report, published in 2003, available from <[www.ivr.org.uk](http://www.ivr.org.uk)>.

*Archaeology Labour Market Intelligence: Profiling the Profession 2002/03*, by Kenneth Aitchison and Rachel Edwards, published by the Cultural Heritage National Training Organisation, 2003.

##### **Forthcoming research:**

Justin Davies-Smith, Director of the Institute for Volunteering Research, will undertake research for the National Trust in the autumn of 2003 to map volunteer activity, which is thought to be considerably greater than is represented by the statements contained in the Annual Report

The Institute for Volunteering Research is currently seeking funding for a new National Survey of Volunteering to update the national survey carried out in 1997.