



Attendees: Violet Dalton [Head of Volunteering]; Amy Drysdale [Volunteer Coordinator]; Richard Ellis [Volunteer]; Michael Goodwin [Volunteer, HQ / SHE]; Sheonagh Martin [Property Manager, Georgian House]; Finlay McKichan [Volunteer, Drum Castle and Aberdeen Members Centre]; Jennie MacLeod [Volunteer, Pollok House]; Peter Westbrook [Volunteer, Georgian House]; Willie Wright [Volunteer, Kellie Castle]; Janet Lee [Volunteer, Gladstone's Land]; Alison Mitchell [Chairman, Aberdeen Members Centre]; Jon Downie [Outdoor Action Coordinator, HQ / Volunteering]; Ian Riches [Archivist]; Chris Major [Members Centre Support Officer]; Elle Arscott [Volunteer, HQ / Collections and Gladstone's Land]; Catriona McIntosh [Learning Intern, RBBM]; Ally Beckett [Learning Officer, RBBM]; Hannah Teasdale [Learning Manager, Culzean Castle]

### **1. Welcome and Apologies**

Violet Dalton welcomed all attendees, particularly those attending for the first time. The Forum provides a format to discuss new initiatives in volunteering both within the Trust and the wider volunteering sector, to share good practice and for members to communicate what is happening in their area and provide feedback from the meeting to their properties. The Investing in Volunteers assessor (Zoe McGregor) would also be interviewing volunteers and members of staff throughout the day. Introductions were made round the table.

**Apologies:** Katey Boal; Jo Fairweather; Wendy Purvis; Alison Wilson; Richard Clarkson, Margaret Morton.

### **Matters Arising:**

Guidance notes: As previously noted, the guidance notes on 'Dealing with Difficult Situations' and 'Dealing with Volunteer Complaints and Grievances' are now available on the Trust's internal network, and referenced in the Volunteer Handbook. It is recommended that anyone looking to use these documents contact the Volunteering Dept for further guidance and support. Richard Ellis noted that videos demonstrating role play in action could be of use in this area.

Visitor Experience: Due to a recent return from sick leave, Jo Fairweather was unable to attend the Forum. This would therefore be discussed further at the next meeting.

***Actions to be carried forward: Engage volunteers further in the visitor experience programme in 2015/16:***

- ***Role descriptions to be updated and implemented***
- ***Good news stories to be shared from volunteers***
- ***Learning material focusing on outdoor volunteers (to promote to visitors the work carried out) to be produced***

Investing in Volunteers: Violet noted that the liV logo would be added to publicity materials as these were redesigned / reprinted, and as the website was updated.

- ***Action: Violet / Amy to add liV logo to website / printed materials as these are updated***

### **Updates:**

Buccleuch Innovation Award: Student Groups: Elle Arscott, outgoing President of the group at Edinburgh University, provided an update. She noted that the group has again changed its name, and from Sept 2015 it will be known as the Arts and Heritage Volunteer Group: <http://www.schvolunteer.co.uk/> While the group is still closely connected to NTS, they are also able to access volunteering opportunities with other museums and galleries.

***Action: Violet Dalton to make contact with University of Glasgow Museum Studies course re: placement opportunities at Trust properties (including RBBM).***

Youth Advisory Forum: Sir Kenneth Calman asked Violet to set up a group of young people, which would meet and discuss Trust issues with Senior Management and report to the NTS AGM in September. The first meeting was held in April, with the focus on the Collection, Visitor Experience and Our Voice. Members will also visit properties and look at them from a younger perspective.

Regional Group Committees: Violet met with the Regional Convenors on 27<sup>th</sup> January at Hermiston Quay. Although the crossover between the Regional Assemblies and Volunteer Regional Forums was discussed, it was agreed that the Assemblies are focused on providing information to people interested in heritage, while the Volunteer Forums are designed to engage current volunteers.

Outreach Team: the Outreach Team is part of the Volunteering Department, and includes three members of staff funded by Scottish Natural Heritage (until end February 2017) and managed by current Outreach Development Manager Heath Brown. In March, the Outreach Team arranged an event at Hill of Tarvit for the additional needs schools in Fife called 'GreenScene'. This was very successful, and many of the teachers noted that nobody had ever run something like this event for these children previously. It is hoped that the event can be repeated elsewhere. The event video can be viewed here: <http://youtu.be/nn8gf5IHjjs>

Historic Environment Strategy for Scotland: Violet is a member of the 'Participation' working group, which is led by NTS and includes volunteering and education. More information and the Strategy can be found at the links below:

Information: <http://www.scotland.gov.uk/Topics/ArtsCultureSport/arts/Historic-environment/Strategy>  
'Our Place in Time' strategy document: <http://www.gov.scot/Resource/0044/00445046.pdf>

Violet is also chairing the 'Volunteering' sub-group of 'Participation', which includes Rosie Wylie (Historic Scotland), George Thomson (Volunteer Scotland CEO) and Catherine Cartmell (Museums Galleries Scotland). The sub-group will review current research on volunteering in the heritage sector, identify gaps in the research, highlight best practice and collate case studies of volunteering.

Scottish Heritage Angels Awards: The Scottish Heritage Angels Awards scheme has been set up by a partnership of Scottish Government agencies (Historic Scotland, Royal Commission on the Ancient and Historical Monuments of Scotland, Scottish Government, Archaeology Scotland and Scottish Civic Trust), in association with the Andrew Lloyd Webber Foundation. The awards complement a similar existing scheme in England, and will support delivery of the Historic Environment Strategy for Scotland – as part of this, Violet is in discussions as to whether award nominations can also be used as case studies for the 'Volunteering' sub-group. Violet encouraged Forum members to look at the awards and consider if they could submit nominations. More details can be found on the website: <http://www.scottishheritageangelawards.org.uk/>

Robert Burns Birthplace Museum Pop-Up Shop: Catriona provided an update on behalf of Alison Wilson, about the RBBM pop-up gift and craft shop which is on Ayr High Street. [www.facebook.com/ayrgifts](http://www.facebook.com/ayrgifts) (The shop is manned by RBBM volunteers, and is helping to regenerate the high street area and bring the museum into the town.) It is open 7 days per week, 11am-5pm, and offers a wide range of items. The shop has proved extremely popular with the local community, and there is clear support to continue the shop as long as it continues to cover costs and return a profit. Local people have come into the shop to offer their time as volunteers, as it is in a convenient town centre location.

Georgian House: Sheonagh Martin talked about the Georgian House's 40<sup>th</sup> anniversary fundraising appeal, which is taking place this year. Lots of fundraising events and activities will be taking place throughout 2015 – the aim is to raise £40,000 which will enable the Trust to refurbish and open the entire house to the public.

NTS Emergency Plans: Ian Riches highlighted that the Trust has recently appointed one of its conservators (Julie Bon) on a secondment as an Emergency Planner. Disaster plans will be created for specific properties with nationally significant collections, to plan for the recovery of objects from those buildings. He reminded all attendees to be aware of the risks of fire and if required, to assist with the planning at their properties. The Trust recognised the risk in light of the Glasgow School of Art fire, and the importance of planning ahead has been highlighted again with the disastrous fire on 29<sup>th</sup> April at the National Trust's Clandon Park House in Surrey. <http://www.bbc.co.uk/news/uk-england-surrey-32528435>

## **2. Future of the National Volunteer Management Forum**

As the volunteer members of the Forum participated in a discussion with the Investing in Volunteers assessor, staff members discussed the possible future direction of the forum.

### **Question: What should the Forum look like? What is its future role?**

Long Term Forum Members notes:

- All types of volunteering represented with 'delegates' from staff and volunteers
- Good place to exchange ideas
- Issues are Trust wide, not limited to one type of volunteering
- Face to face, networking essential
- Membership: core team could rotate every 3-4 years; look at how representative the current membership is
- Future role to consider:
  - o Should it continue? (Only if benefit to Volunteering Dept and NTS.) How often should it meet?
  - o Invite questions / queries / big issues / praise from all volunteers / staff
  - o Everyone to feed into agenda / discussion – invite attendees
  - o Make the minutes available to staff / volunteers
  - o Continue to use Volunteer Survey to inform agenda
  - o Two-way communication – including senior managers
- Continue the Regional Forums – plan 3 per year?
- Where do the discussions go to?
- Best practice continually discussed, updated and shared
- Strategy vs operational – both?
- Forum mission statement

First Time Forum Attendees:

- 'Themed' forums
- Bigger issues from members centres feeding up
- Discussion of best practice:
  - o 'Hints and Tips' workshops
  - o Recognition
  - o Recruitment
  - o Engaging new volunteers (other demographics)
- Hearing from volunteers about their experiences / issues / ideas
- Ways for people to contribute, e.g. email / volunteer surveys
- Pre-meetings at property level / Property Manager meetings / Department meetings
- Lunchtime attractions (i.e. lectures, cake)
- General volunteering updates
- Communication – newsletter ideas etc

It was noted that similar comments were made by both groups, suggesting that in general, there are similarities in what attendees want to gain from the meetings.

Further points from the ensuing discussion included:

- Responding to the question, "What purpose does the Forum serve?"
  - o Volunteers and staff share good practice from a range of properties / role. It was suggested that there could be more opportunities for staff/volunteers to present. It was mentioned that the Learning Team meetings include staff delivering short tales to help recreate good ideas elsewhere, and also opportunities for two managers to deliver different views on the same topic
  - o Agreeing procedures at the Forum provides endorsement for good practice and its implementation – it gives authority to decisions which have been taken

- Does the Forum membership represent the range of NTS volunteers and staff? How could this be improved?
  - o Invites have been issued directly, by email and at property. Operational issues at properties often limit the involvement of staff and volunteers from certain areas, e.g. gardens but suggestions for how the profile of the group can be extended would be welcomed.
- How do volunteers feed in to the Forum agenda?
  - o Direct comment, results from the Volunteer Survey. Attendees are invited to suggest items for the agenda.
- Regional Forums 2014 shared good practice between volunteers – they give volunteers a ‘voice’ in their local area. Regional Forums: 3 or 4 per year, to cover all areas of the country? (i.e North, North-East, Central, South) How do we determine the action points from the Regional Forums?
  - o For now, due to budgetary constraints this number will remain at 2 but could be extended next year if there was enough interest.
  - o Action points will be cascaded to the main forum/property staff and volunteers
  - o **Action: Two Volunteer Forums to be arranged for Autumn 2015 in current format. Locations – the North East and South of Scotland.**
- Should Property Managers attend the Regional Forums to share / learn about volunteer management? Or is Volunteer Management Training more appropriate?
  - o No strong views on this. Some merit in the meetings being only for volunteers to encourage frank participation but involving managers in the discussion may make it easier to put changes into action.
- How should the Forum minutes be disseminated to staff / volunteers?
  - o To date, the minutes have only been distributed to attendees. These could be made available to a wider audience – perhaps in an abbreviated form. These could be sent to Property Managers/Heads of Service to display on notice boards. It would also be possible to upload these to the website with a link included in the e-newsletter.
- Are there ideas from previous Forum meetings (agendas / minutes) which need refreshed?
  - o This could well be the case. Amy/Violet to review these, with other members to feed in.

### **3. Volunteering: the Key to Happiness – Final Report**

2014 was the Year of Happiness for the Volunteering Department, part of a Trust-wide project.

#### **Volunteer Survey – Optional Questions (Diarmid Hearn, Head of Policy)**

Health and wellbeing is an emerging topic in policy work. Having worthwhile things in their lives – such as volunteering – is an important part of making people happy.

The Volunteer Survey module had an 18.2% response rate (492 people, rate based on survey distribution) – this was a good response rate, which provided a robust evidence base for general volunteering in the Trust. Survey answers were measured against standard baselines for areas including life satisfaction and happiness. Positive responses were higher for Trust volunteers than for the UK average – it could be said that by volunteering, people become happier.

Motivations for volunteering included ‘support NTS’ (60%), ‘meet new people’ (52%) and ‘give something back’ (50%). In their experience of volunteering, respondents agreed that they had met new people (93%), that they looked forward to volunteering (92%) and that they felt they were helping Scotland’s heritage (90%). Interestingly, many outdoor volunteers put less priority on supporting the Trust, but more priority on gaining new skills and making a difference.

The results have also been presented to Volunteer Scotland (see below for Policy’s queries followed by Volunteer Scotland’s responses):

- Policy: NTS volunteers are older than the national average
  - o Volunteer Scotland: not a particular issue, unless specifically targeting young volunteers and failing to recruit
- Volunteering is constrained by health and income
  - o NTS volunteers tend to be in good health
- Volunteering numbers are higher in rural areas, where there is a greater sense of community

- Many NTS properties are in rural areas
- Younger volunteers are more likely to be motivated by extrinsic factors than intrinsic factors
  - Should the Trust be more concrete in the rewards for younger volunteers?

What's next? The report was published on 20<sup>th</sup> March 2015 (International Day of Happiness) and is available on the Trust's website:

[http://www.nts.org.uk/volunteering/downloads/nts\\_volunteering\\_and\\_happiness\\_report\\_-\\_march\\_2015\\_-\\_final.pdf](http://www.nts.org.uk/volunteering/downloads/nts_volunteering_and_happiness_report_-_march_2015_-_final.pdf)

Media promotion has been good, with multiple news stories. Further journal and media work will follow in the near future. The research has also been shared with the Historic Environment Scotland 'Participation' group, of which Violet is a member.

#### Volunteering and Happiness: Violet Dalton

The Volunteering Year of Happiness was prompted by a survey quoted by NCVO, which said that volunteering was the second-most likely thing to make you happy (after Scottish Country Dancing).

There was a discussion surrounding volunteering, happiness, and the survey results:

- Richard Ellis queried the provision of internships in the Trust. Diarmid noted that we need to be careful that we are not providing too many training opportunities for a highly skilled workforce (i.e. stonemasons) who then find it difficult to gain employment. Violet highlighted the current issue of paid vs unpaid internships, which has been discussed at HES – the Trust has a good record of assisting volunteers into employment either internally or externally, although paid internships are offered in association with other organisations where possible.
- The statement that volunteering was more popular in rural areas caused some discussion, as there are Trust properties in rural areas looking to recruit more volunteers. There are also urban success stories in the Trust, such as the Georgian House, where demand far outstrips capacity.
- Janet Lee queried if the Trust provides volunteering opportunities for disabled people. Violet noted that built properties, due to their historic nature, can often pose access issues for people for disabilities, however a volunteer's suitability for a role is determined by how well they meet the role specifications. Where people are unable to access general volunteering opportunities, whether due to disability or other issues, our Community Partnerships team works to enable them to access our properties in different ways.

As part of the Volunteering and Happiness research launch, Violet was interviewed on BBC Radio Scotland – the radio interview was played for Forum members and can be accessed at:

<https://audioboom.com/boos/3061500-bbc-radio-scotland-20-march-2015-volunteering-and-happiness>

#### **4. National Museums Scotland**

As per Richard Ellis' request at the previous meeting to invite external people to present to the Forum, representatives from National Museums Scotland were invited to speak to the Forum members about volunteering within the museums.

Debbie Wilson (Volunteer Coordinator): Debbie coordinates the volunteers across the different museum sites, as well as overall volunteer policy etc and gave an overview of how volunteering is organised at the National Museums. The NMS sites are the National Museum at Chamber Street, National Museum of Flight, National Museum of Rural Life and the National War Museum. She explained the roles that volunteers are involved in. Part of this includes ensuring that volunteer roles don't conflict with paid staff roles, which would pose difficulties with the unions.

Lee McCulley (Adult Learning Officer): Lee oversees the volunteer guide programme at the Chambers St museum site. There are 32 volunteer guides, 2 administrative volunteers (who arrange the guide rota etc) and a volunteer guide chairperson, who represents the guides. Three free guided tours are provided each day, covering the highlights of NMS (11am), the Scotland galleries (1pm) and a specific themed tour (3pm). The tours are unscripted so the volunteers are free to develop each tour as they want. (The highlights tour however must include certain key items from the collection and a visit to each of the main galleries.) Themed tours are entirely developed and delivered by the volunteers. Lately, promotion via social media has proved particularly successful, especially Twitter which has increased the success and popularity of the tours. Social media, including Facebook and Twitter, also allows for quick feedback from visitors. The tours

have become more and more popular over the years, with demand growing from foreign tourists in particular. Volunteer recruitment is currently based on enquiries, with no need to advertise for volunteer guides. Applicants are provided with a role description and application form, and asked to give a five minute presentation at their interview. Successful applicants receive two days of training, along with ongoing mentoring from another volunteer. Monday morning meetings are also held for CPD training, where new developments are discussed, a talk is presented and the volunteers have an opportunity to socialise. Future initiatives are planned, including tours for visually impaired groups and travel trade tours.

David (Volunteer Guide): David noted that the unscripted nature of the tours is very important to the volunteers, as it gives them freedom to express themselves, however this does require a level of ongoing support. Ongoing training via curator talks, visits to other museums etc is also important – no area of expertise is considered unimportant, and the wide variety of talks ensures that volunteers have a broad base of knowledge to draw on as they develop their tours.

NTS: guided tours take place in a number of properties represented at the Forum: The Georgian House (private tours); Pollok House (taster tours developed by the volunteers); RBBM (weekend tours, Wednesday highlight talks)

Discussion: There were questions regarding how NMS maintain the quality of their tours, when these are developed and presented solely by the volunteers. Previously, guides have given 1:1 tours with a fellow guide, where they can then sit down and discuss how the tours went and any possible improvements (not currently used). The NMS representatives noted that often only curators have the expertise to judge if the information presented is accurate, but that they rarely have the time to go on tours to judge this. Public feedback can also identify if there are any tours or guides which require attention. NMS are still working on a model of feedback which works for both the museum and for the guides.

It was agreed that the presentations and the networking over lunch had been very useful. The Museum staff and volunteer were thanked for taking the time to attend the meeting.

## **5. Volunteer Friendly Procedures and Processes**

Violet highlighted the department's aim to carry out a wide-ranging review of volunteer documentation. Many of our documents, in particular position descriptions and certain policies have been designed to match with HR documentation. Over the years there has been a move to make volunteer documents less formal and more accessible. This is in line with the Investing in Volunteers award that recognises that: where the organisation has HR policies, volunteers should have their own equivalent policy and should only be included in general policies if appropriate. The recent cascading of the Social Media policy had led to feedback from some volunteers who pointed out that they weren't employees and that the policy was too prescriptive for the type of volunteer work they were involved in. Although it is important to remember that the public perception of a volunteer is that they represent the Trust, (whether or not they are speaking outwith their volunteer role), Violet acknowledged that the specific tone / wording of documents was important. Consultation with volunteers is an important aspect of ensuring that we get the message and the tone right.

***Action: Members of the Forum to alert Violet to volunteer paperwork which requires early attention***

***Action: Social media guidance to be included in Volunteer Handbook. Property / volunteer managers to raise awareness at volunteer meetings, particularly pre-season meetings***

***Action: Review induction paperwork and adapt (if required) to ensure its relevance to volunteers***

Intellectual Property: Willie Wright reported to the Forum members that concerns about the Intellectual Property statement had been raised at Kellie Castle. These concerns have been raised by volunteers involved in specific projects, where they have developed resources on their own initiative (rather than as part of a Trust project included on a role description).

Stephen Small, the Trust's Solicitor had been invited to attend the meeting to speak on this subject. He noted that the Trust holds a huge amount of Intellectual Property (IP), defined as information which can be owned but not touched – database, photographs and research work are all included, as is any data / information which could be commercially exploited. This is a very important topic for the Trust, as almost everyone creates IP as part of their day to day work. For an employee, copyright automatically belongs to the organisation. Automatic presumption of ownership however doesn't apply to volunteers – a volunteer

could write interpretation / enter info into a database for the Trust and hand it over, yet still retain the copyright. This can pose difficulties: for example, a volunteer could digitise an image – as digitisation is a creative act, the volunteer would retain the copyright of the digitised image. Involving volunteers can therefore pose a risk – the Trust may not hold the full rights to a work and therefore be placed in a vulnerable position. Transfer of copyright can only be carried out via a document with a signature, not by any electronic method. If volunteers are creating IP on behalf of the Trust, as part of an agreed position and as stated in the position description, volunteers need to sign the IP agreement prior to carrying out any volunteering with the Trust.

There was a discussion as to whether the Intellectual Property statement should be on a different form, however Stephen highlighted that for the majority of volunteers, it would be appropriate to retain the statement as part of the Data Protection statement. For new volunteers, this is a pragmatic approach, capturing simultaneously their permission to hold personal details and the copyright for any work created as part of their role. The present statement was adopted for the 2015 Data Protection Audit and is on the volunteer registration form.

Property and volunteer managers need to be aware of the IP issue, and how it affects roles that they ask volunteers to undertake. This may be an awareness issue – where a volunteer is affected by the IP statement, managers should sit down and discuss how the Trust uses the information going forward on a case-by-case basis. A short written agreement should be produced which allows the Trust to use information in perpetuity – this can be reviewed by Stephen if required.

**Action: Redraft the IP statement in the volunteer registration form and the Volunteer Handbook with Stephen Small's guidance**

**Action: Provide guidance to volunteer managers on IP, including how volunteer roles may be affected and how to create an agreement with volunteers where required**

**Action: Include a note in the Volunteer Handbook that when resigning copyright, the volunteer retains the moral right to be acknowledged as the creator of that work.**

## **6. Volunteer Regional Forums / Volunteer Conference 2015**

The Volunteers' Week Conference will be held on 30<sup>th</sup> May – there are still spaces available, so please promote the event to volunteers.

The 2014 Regional Forums were more about sharing information and good practice than training sessions (like the Conference) – there was a discussion as to which style was better. Alison Mitchell, who attended the Culloden Forum, commented that she found the existing format to be suitable to the event. There was general support for forums to be held in Aberdeenshire and in South-West Scotland. Willie Wright highlighted his previous request that issues be referred between the National Forum and the Regional Forums. Violet noted that the meetings are designed to address live issues, which may be raised at either national or local level. She added that it would be very helpful to have some representation from the National Forum at Regional Forums.

Richard Ellis stated that there was apparent duplication of discussions, between the Regional Volunteer Forums and the Regional Assemblies. However, it was highlighted by those who had attended the Regional Assemblies that these were mainly lectures, did not refer to volunteer issues and that very few volunteers actually attended these events.

Sheonagh Martin highlighted the importance of providing volunteers with an opportunity to raise issues of concern without recrimination, and that the Fora should not lose the aspect of volunteer engagement.

## **7. A.O.B.**

**Recent Research Papers:** Violet highlighted a series of recent research papers related to Volunteering:

[https://cvsanpc.files.wordpress.com/2015/03/decision-time\\_final-report-of-cvsa\\_mar15.pdf](https://cvsanpc.files.wordpress.com/2015/03/decision-time_final-report-of-cvsa_mar15.pdf) - 'Decision Time: Will the voluntary sector embrace the age of opportunity?' (Final report of the Commission on the Voluntary Sector & Ageing March 2015)

<http://www.bankofengland.co.uk/publications/Documents/speeches/2014/speech756.pdf> - 'In giving, how much do we receive? The social value of volunteering' (Speech given by Andrew G Haldane, Chief Economist, Bank of England, 9 September 2014)

<http://www.museumsgalleriesscotland.org.uk/site/includes/content/downloadfile.php?downloadtype=publication&fname=4f260d681e3fb5eb1d43d3cb79da35d1.pdf> 'The Whole Picture - Understanding the scope, scale and impact of volunteering in museums and galleries in Scotland' (Museums Galleries Scotland, January 2015)

Members Centres: Richard Ellis requested that Chris Major speak at the next NVMF meeting about the future of the Members' Centres.

#### **8. Date of Next Meeting**

Thursday 5<sup>th</sup> November 2015; Kintail Room, Hermiston Quay