

Volunteering and the Historic Environment

A Research Report by Volunteer Development Scotland on behalf of the Historic Environment Advisory Council for Scotland

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Executive Summary

Introduction

In June 2008, Volunteer Development Scotland (VDS) was commissioned by the Historic Environment Advisory Council for Scotland (HEACS) to undertake research into volunteering in the historic environment. The research aimed to identify the scope and quantify the scale of volunteering in the historic environment and examine where additional support might help to facilitate its sustainability and development.

The specific project objectives were:

- to undertake an audit of volunteering in the historic environment across Scotland and establish a baseline of the range and scale of volunteering activity;
- to examine opportunities to improve the coordination and management of volunteers and volunteering opportunities in the historic environment; and
- to examine skills and resources across the sector, including how volunteering in the historic environment might be stimulated and supported

The following findings relate to the 233 organisations that participated in the study.

Key Findings

Range and scale of volunteering activity

- Participating organisations reported a total of **13,204** 'active' volunteers and **18,564** total ('active' plus 'non-active') volunteers contributing to the historic environment sector.
- Participating organisations reported a total of **167,721** volunteering hours given in the average month
- The economic value of volunteering within participating organisations is around **£28 million**¹. Given the large number of volunteer-involving organisations who were identified but did not take part in the research, the contribution of historic

¹ It is important to note that this is an estimate, based on a specific number of organisations and their reported hours, using the average Scottish weekly wage as a multiplier.

environment volunteering to the Scottish economy is likely to be significantly higher.

- Participating organisations are involved in a wide range of activities within the sector.
- Organisations involve volunteers in a range of activities of a professional nature such as preparing publications, archival research and conservation.
- The majority of volunteers are found in the largest organisations while many smaller organisations are entirely dependent on volunteers.
- The proportion of volunteers aged **16-25** in the sample is **23%**; this is contrary to previous expectations within the sector that young adults were under-represented.

Volunteer Management and Co-ordination

- The majority of organisations recruit new volunteers through word of mouth and local networks.
- The majority of organisations do not collect any information on their volunteers beyond basic contact details.
- The majority of volunteer management in the respondent organisations is through unpaid peer support, while many organisations have no provision at all.
- The local authority is the most commonly used source of information and advice on volunteering issues.
- Respondents expressed concern about Historic Scotland's perceived lack of support of volunteering in the sector, although the evidence suggests that Historic Scotland is also regarded as one of the main points of contact for information and support on volunteering issues.
- Evidence suggests that voluntary sector organisations are more 'linked in' to volunteering networks and support than are their public and private sector counterparts.
- Funding to support volunteering is the most commonly reported challenge to volunteer involving organisations in the sector.

- Some organisations in the sector are fragile, mainly due to a lack of resources and the level of bureaucracy involved in working with protected sites and buildings.

Conclusions and Recommendations

From the 233 organisations which participated in the research (26% response rate), we have found that 12,449 volunteers carry out a total of 167,721 hours per month, which equates to an economic value of £28,223,653 per annum.

We recommend that:

- This baseline set of organisations is invited to participate in a longitudinal study to monitor trends in the scale, nature and value of volunteering within the sector over time.
- The significant contribution of volunteers is taken into account by Government and others when considering the overall contribution of the historic environment sector to the Scottish economy and National Outcomes.
- Organisations are encouraged to collect and maintain robust volunteering data in order to inform volunteer development activities and provide evidence of the impact of volunteering. A simple method of volunteer sampling could be employed to establish estimated volunteer contributions.

Volunteers play a key role in the historic environment, giving a large number of hours in carrying out skilled and semi-skilled tasks. This evidence, together with examples of resistance to skilled volunteering roles within some parts of the sector, suggests a lack of shared understanding of what roles and tasks are appropriate for volunteers.

We recommend that:

- The skills of volunteers and the quality of their work in the historic environment are better identified and understood.
- Research be undertaken to improve understanding of the scope and quality of volunteers' work in the historic environment, in order to help target training and build a shared understanding of volunteers' contribution to the sector.

Evidence suggests that good volunteer management practices (as defined by quality standards such as Investing in Volunteers) are not being implemented consistently across the sector.

We recommend that:

- The volunteering infrastructure, including Volunteer Development Scotland and the Volunteer Centre Network, engage with the historic environment sector to assist in improving the application of good volunteer management practices.
- Volunteer involving organisations are supported by historic environment bodies, local authorities, and the voluntary sector to consider their policies and practices around volunteering and volunteers.
- Individuals tasked with supporting volunteers are given appropriate training and support.
- Organisations consider the Investing in Volunteers quality standard as a benchmark of good volunteer management practice, whether or not they formally undertake to achieve the Investing in Volunteers (IiV) Award.
- Organisations providing funding to the sector consider the usefulness of quality volunteer management practices, and encourage grant applicants to consider their practice in relation to quality standards such as IiV.

Concern had been expressed by key individuals in the sector that young people did not seem to be much involved in volunteering in the historic environment. However, this survey has shown that a relatively high number of young adults are involved, compared both with sector expectations and the numbers volunteering in the natural environment, but they appear only to be involved in particular types of organisation.

We recommend that:

- Organisations across the sector consider how to involve more young people in their work, and identify what activities might appeal to young people considering volunteering in the historic environment.
- Organisations consider developing innovative methods of recruiting and roles that will help engage people (of all ages) who might not typically become involved in the historic environment.
- Organisations consider consulting their local Volunteer Centre for support in attracting young volunteers through existing youth-focused programmes.

- Further research is undertaken to examine enablers and barriers to young people's involvement in the historic environment sector.

Historic Scotland, while being a major funder of organisations which involve volunteers, is seen by some respondents as somewhat negative about volunteering in the historic environment, and not setting an example to the sector.

We recommend that:

- HEACS meets with Historic Scotland to discuss the findings of this research and begin discussions on how volunteering can be better supported in the sector.
- Historic Scotland considers the wider policy context within which the Scottish Government supports volunteering and, against this background, considers how best it can help the historic environment sector to realise the full potential of volunteering.

The research findings have some interesting similarities and differences to those found in a similar audit and review of the natural heritage carried out on behalf of Scottish Natural Heritage in 2006. For example; there are higher numbers of volunteers reported in the natural environment, yet the historic environment volunteers generate a higher number of volunteer hours.

We recommend that:

- Historic Scotland, HEACS and other key historic environment bodies engage with their counterparts in the natural heritage sector in order to understand how they might better support volunteer development, share resources and improve practice across both sectors.

Contents

Executive Summary	2
Introduction	2
Key Findings	2
Conclusions and Recommendations	4
Contents	7
Definitions.....	8
Introduction	10
Context for the Research.....	11
Policy Context	11
The Basic Principles of Volunteer Management.....	12
Existing Literature	12
Consultation.....	15
Methodology	17
Literature Review	17
Consultation.....	17
Database Development.....	17
Questionnaire.....	19
Case Studies	20
Scope and Limitations.....	22
The Research Findings	23
Respondent Organisations	23
The volunteers	31
Volunteer management.....	45
Organisational support.....	54
Organisational Challenges	58
Discussion	60
Identification with 'volunteering' and the 'historic environment'	60
Volunteers and the sector	61
The uptake of good practice.....	62
The role of the local authorities and Government	64
Comparison with the natural heritage	65
Conclusions and Recommendations	67
References	70
Appendix 1 Research Questionnaire	72
Appendix 2 Telephone Interview Schedule	79
Appendix 3 Economic Value of Volunteering	81
Appendix 4 Summary of Investing in Volunteers Indicators	82

Definitions

Volunteering

The definition used in this research is from the Scottish Executive (now Government) Volunteering Strategy (2004): "*Volunteering is the giving of time and energy through a third party, which can bring measurable benefits to the volunteer, individual beneficiaries, groups and organisations, communities, the environment and society at large. It is a choice undertaken of one's own free will, and is not primarily motivated for financial gain or for a wage or salary*".

In the report we refer to two types of volunteer:

- 'active' to refer to those who give hands-on help to an organisation; and
- 'non-active' to refer to those who support an organisation financially or through occasional attendance at events, etc.

Historic Environment

The definition used in this research is taken from Scottish Historic Environment Policy 1 (2006b): "*Any or all of the structures and places in Scotland of historical, archaeological or architectural interest or importance*".

Volunteer involving organisation

Any organisation, charity, group or club that involves volunteers in its work. Volunteer involving organisations are found in the voluntary, public and private sectors.

Volunteer manager

Anyone who has responsibility for organising, leading, supporting or co-ordinating volunteers. A volunteer manager may be a paid member of staff or an unpaid volunteer. A volunteer manager may hold a paid or voluntary post dedicated to volunteer management, or hold a paid or voluntary post which includes volunteer management as part of the role.

Volunteer management

A planned and organised process for the involvement of volunteers. The main elements of volunteer management are:

- planning for volunteer involvement;
- recruitment and selection;
- induction and ongoing training;
- volunteer supervision and support;
- volunteer retention;
- volunteer recognition;
- volunteer development and progression, including exit.

Introduction

In June 2008, Volunteer Development Scotland (VDS) was commissioned by the Historic Environment Advisory Council for Scotland (HEACS) to undertake research into volunteering in the historic environment. The research aimed to:

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- examine where additional support might help to facilitate its sustainability and development.

The specific project objectives were:

- to undertake an audit of volunteering in the historic environment across Scotland and establish a baseline of the range and scale of volunteering activity;
- to examine opportunities to improve the coordination and management of volunteers and volunteering opportunities in the historic environment; and
- to examine skills and resources across the sector, including how volunteering in the historic environment might be stimulated and supported.

The project addressed these objectives by:

- creating a database of volunteer-involving historic environment organisations in Scotland;
- quantifying the volunteer effort in these organisations; and
- undertaking an in-depth analysis of the structure of volunteering and the support needs of a sample of these organisations in Scotland.

Context for the Research

This section of the report sets the background and describes the context for this study: the policy environment; the basic principles of volunteer management; existing research on volunteering in the historic environment; and views of historic environment volunteering amongst key individuals in the historic environment sector.

Policy Context

The Scottish Executive (now Government) Volunteering Strategy sets out the role of government in supporting volunteering. It details four strands² which provide a framework for *"embedding a robust culture of volunteering in Scotland"* (Scottish Executive, 2004:21). The Strategy identifies Volunteer Development Scotland and the Volunteer Centre Network as playing a key role in taking forward the aims of the strategy. Since then, a number of strategies produced by the Scottish Government have defined the role that volunteering can play in areas such as skills development (Scottish Government, 2007:16): *"youth work and volunteering opportunities offer young people the chance to develop confidence, motivation and skills that stay with them for life"*.

The Scottish Government's fifteen National Outcomes include an outcome specifically relevant to the historic environment: *"We value and enjoy our built and natural environment and protect and enhance it for future generations"* (Scottish Government, 2008b). One of the National Indicators stemming from this outcome is *"Improve the state of Scotland's historic buildings, monuments and environment"* (ibid). Although not explicitly stated in the Indicator, it is clear there is a role for volunteering in this area.

Historic Scotland is an executive agency of the Scottish Government charged with *"safeguarding the nation's historic environment and promoting its understanding and enjoyment on behalf of Scottish Ministers"* (Historic Scotland, no date). Its Operational Policy on support for the voluntary sector mentions the contribution that the sector makes to conservation of the historic environment in Scotland. It is recognised that the voluntary sector plays a number of roles in relation to the historic environment, including: the care of 'important historic treasures'; campaigning for better protection of the historic environment; as 'service delivery agents'; and as a 'focus for volunteering': *"Voluntary organisations provide opportunities for people to become involved in the historic environment sector"* (Historic Scotland, 2006a:4). Historic Scotland mainly plays an investment role in its support of the sector, providing core funding and project funding to a range of organisations, recognising that: *"Grants to voluntary bodies are an*

² Strands of which focus on: Project Scotland and young people; Dismantling the barriers to volunteering and closing the opportunity gap; Improving the volunteering experience; and Monitoring, evaluation and ongoing policy development.

essential part of wider efforts to safeguard Scotland's historic environment and promote its understanding and enjoyment"(ibid:7).

Linked to this is the role of local authorities in conserving the historic environment, which was considered in a previous HEACS report. This noted that "*Local authorities have the major responsibility for managing the historic environment in each of the 32 council areas of Scotland, primarily through the planning system*"(HEACS, 2006:3). It was noted that the local authority role in this area 'cannot be isolated' from the role of Historic Scotland and the voluntary sector. In particular the 'degree of local consciousness of this historic environment' varies across the local areas, and as such depends on those involved, and often depends on the support of the voluntary sector. The importance of the voluntary sector in terms of its inherent impartiality due to being separate from government was also noted, alongside the fragility of organisations dependent on regular funding applications and the contribution of volunteers.

The aims and objectives of the present study did not focus on the policy environment and its relationship to volunteering in the historic environment. However, where respondents commented on the wider policy environment, this has been presented and discussed here.

The Basic Principles of Volunteer Management

McCurley & Lynch (1998:19) state that 'effective volunteer management requires a planned and organised process similar to that required by any organisational project or effort'. The processes can include: programme development, recruitment, matching, training, supervision and recognition of volunteers; but there are also wider considerations around best practice, quality, policy, networking, and learning for those managing the volunteers.

Across the UK standards are in place for groups and organisations, pre-eminent among them the Investing in Volunteers Quality Standard (IiV). This standard encompasses 10 indicators which cover all aspects of volunteer management (see Appendix Four).

This study has drawn on this best practice literature, using it as the framework against which to assess the extent and quality of volunteer management practice as reported by respondents in the historic environment sector.

Existing Literature

A review of existing literature and research on volunteering in the historic environment in Scotland was carried out. As specified in the research methodology (VDS, 2008:4), the review covered Scottish and UK literature, making use of both physical and electronic libraries. The main sources of information were: the VDS library, the Institute

for Volunteering Research (IVR), HEACS and Heritage Link³. There is little Scotland-specific research on volunteering in the historic environment; the majority of studies in this area were carried out in England. Some research has been carried out on volunteering in other sectors in Scotland that may be relevant in the context of this research, e.g. on volunteering in the natural heritage.

The Scottish Household Survey monitors levels of volunteering in Scotland through use of a set of questions devised to collect data on the prevalence and frequency of volunteering. The most recent data set reports that *"30% of adults in Scotland have provided unpaid help to organisations or individuals in the last 12 months"* (Scottish Government, 2008a:127). Further questions on volunteering ask about the types of organisations or groups that individuals help as well as the types of unpaid activity undertaken. However, the categories provided are not meaningfully recognisable in the context of the 'historic environment'.

Data collected by the Taking Part Survey in England can give an idea about levels of involvement in volunteering in 'culture'. This survey, carried out on behalf of the Department for Culture, Media and Sport, collects data on engagement in three areas: culture, leisure and sport. The survey is commissioned in partnership with relevant non-departmental public bodies, including English Heritage. Data is collected on various types of engagement in the three areas, including engagement through volunteering. Data from 2006/7 reported that: *"during the past 12 months, 3% of all adults volunteered in the cultural sector, of which ... 39% in the historic environment sector"* (Department for Culture, Media and Sport, 2008:8).

Moving on to research which examines the sector more specifically, there are some notable findings around volunteering in the historic environment. A common theme was the vital role that volunteers play in supporting the sector and the suggestion that some organisations could not function without volunteers. A mapping exercise of volunteering in the historic environment in England described volunteers as *"an essential part of the fabric of the historic environment"* (Heritage Link, 2003:7), and noted that *"without volunteer input, most of the organisations that operate within the heritage sector would struggle to survive"* (ibid:1). These sentiments are reflected in other recent research findings, including a study of voluntary organisations in the heritage sector in England (Heritage Link, 2006), a study of the role and development of volunteers in the museums, libraries and archives sector (Howlett et al, 2005), and a study of the impact of museums and galleries in Scotland (Museums Galleries Scotland, 2008).

In addition to the vital role of volunteers, these pieces of research highlighted associated issues, such as the skills base of volunteers and the opportunities that the sector provides to those volunteers who wish to develop their skills. It was noted in the 2003

³ A body set up in 2002 by national heritage groups to promote the central role of voluntary participation in the historic environment sector.

Heritage Link study that *"many of the sectors volunteers are highly skilled"* (Heritage Link, 2003:1). In addition to this, the 2006 Heritage Link study reported that *"the sector offers thousands of individuals opportunities for self-development and community work through its growing volunteer and membership programmes"* (Heritage Link, 2006:11).

In considering the roles that volunteers play in supporting organisations to meet their aims, two different types of volunteers were recognised as supporting the historic environment. In the 2003 Heritage Link study, these were described as 'active' and 'passive' volunteers. The former describing those who *"give their time to help the organisation achieve its broader objectives in some capacity, and who are not paid for their contribution"* (Heritage Link, 2003:9), and the latter being *"those who give money to an organisation, through membership fees, donations, gifts or legacies, or who simply attend meetings and lectures"* (ibid:8). The importance of membership in supporting the historic environment was further examined in the 2006 Heritage Link study.

In spite of the recognition of the fundamental part volunteers play in supporting the historic environment, some studies found some areas of volunteer management to be less organised. The 2003 Heritage Link study found that organisations were unlikely to have strategies for volunteer involvement, and tended to be *"unaware of the best practice within the voluntary sector"* (ibid:1). This same study also raised some issues around the collection of data on volunteers. In the majority of organisations, no data was collected; even where it was, it was felt that official records did not capture everyone who engaged with the sector. It was noted that individuals in the sector often did not identify themselves or others as volunteers.

In addition, the 2006 Heritage Link study reported that there was a lack of knowledge in the sector as to who the volunteers are, and questionnaire returns demonstrated a lack of ability to specifically identify those *"under 45 years of age, socio-economic groups C2, D and E, and black and minority ethnic groups"* (Heritage Link, 2006:31). According to the respondent organisations, this was due to the apparent lack of need for this information, and the belief that collecting such information might put people off from being involved. Despite the apparent lack of information collected, it was identified that the sector was not representative of society as a whole and that there were fewer members in these three categories. The 2005 IVR study recommended that *"organisations need to look beyond older (maybe retired) volunteers motivated by interest and younger volunteers motivated by specific skill acquisition to attract more general volunteers"* (Howlett et al, 2005:84). The need to engage younger volunteers to ensure the longevity of organisations was stressed by the 2006 Heritage Link report.

Recommendations arising from previous research ranged from quite specific recommendations around volunteer management, to wider recommendations for the support of the sector. The 2006 Heritage Link report stated the need for *"stronger Government recognition and understanding"* (Heritage Link, 2006:10).

Finally, an audit and review of volunteering in the natural heritage, carried out by Volunteer Development Scotland in 2006 on behalf of Scottish Natural Heritage, is a useful indicator of levels of volunteering in a related sector in Scotland. There was an expectation on the part of HEACS that the “*scale of volunteering in the historic environment may to some extent echo that in the natural heritage sector*” (HEACS, 2008:4). This 2006 research found that there were 23,340 individuals in Scotland involved in volunteering in the natural environment, contributing a total of 91,149 hours in the average month, which was calculated to contribute the equivalent of about £14 million per annum to the Scottish economy.

This review of the literature highlights a gap in knowledge about volunteering in the historic environment in Scotland. It is not known whether trends identified in England are present in Scotland, such as: a lack of knowledge of who volunteers are; a lack of connection with the voluntary sector in general and good practice in particular; or the different levels of volunteer involvement across organisations. Nor is it known whether levels of volunteering in the natural environment in Scotland are similar to those in the historic environment. The Scottish Household Survey is the most comprehensive national study of volunteer involvement in Scotland, but does not provide enough detail of the sectors in which people volunteer for us to extrapolate levels of volunteering in the historic environment.

This study is the first piece of research of its kind in Scotland and will provide a comprehensive picture of volunteering in the historic environment, including: the levels of volunteer involvement; the application of volunteer management practice; and the economic value of volunteering. The study will also illustrate some of the complex realities behind the headline statistics.

Consultation

To inform the research, and to give some idea of current sector issues in the historic environment, a number of ‘consultation’ telephone calls were undertaken with lead staff in historic environment umbrella bodies, and with individuals who had been involved in related HEACS’ work as prominent specialists in their field. These conversations were unstructured and covered the individuals’ understanding of volunteering in the historic environment, including issues or opportunities for volunteering, and what they would like to find out from the research. Many of the issues they raised echoed those of the research findings presented in the previous section.

It was suggested by one respondent that volunteering levels in the sector are fluid: there are long-term volunteers, and issue-based volunteers. As such, a snapshot of volunteering was thought to be difficult to capture. It was also felt by one respondent that there may be issues of definition; people often don’t see themselves as volunteers,

and some groups may not identify themselves as being part of a sector called the 'historic environment'.

A general theme among responses was that the sector had a high number of older volunteers, particularly due to their greater availability of time and the willingness to make a long-term commitment. It was also noted that many volunteers in the sector had a previous professional background. One respondent felt that *"younger people's interests are different to the set-up of the sector"*. Another suggested that organisations need to focus on what interests young people if they want to get them involved. It was felt that the sector tended to *"go for the easy people"*. This point was further expanded by a respondent who felt that the sector was not tackling volunteering strategically: that organisations engage volunteers, but do not have volunteer management practices in place. It was felt that some organisations *"don't capitalise on volunteers to further their aims"*. It was suggested that the assistance of the wider voluntary sector might be sought to provide support in this area. It was noted that the National Trust for Scotland supported its peers in the sector with regard to volunteering, for example by sharing good practice.

Concern was expressed about the set-up of individual organisations, and in particular about how volunteering was managed. It was noted that it was important for volunteers to engage meaningfully, although this could be more difficult if it had to be fitted in around paid work. One respondent suggested that having a volunteer co-ordinator might be a way to develop engagement, particularly of young people. It was suggested that volunteer management was an area of need for the sector, particularly accessing relevant training in volunteer management, such as NVQs. It was suggested that it would be useful to know more about the involvement of young people in the sector, such as the percentage of volunteers aged 16-24, and which type of organisations were successful in involving them.

A majority of respondents expressed some concern about Historic Scotland's role, and the negative attitude they felt it had towards volunteering and volunteers. A recurring theme was that Historic Scotland's attitude was that people need to be qualified to work in the historic environment and, as such, they were reluctant to involve volunteers. One respondent questioned Historic Scotland's relationship with the voluntary sector and whether Historic Scotland understood what the voluntary sector did. Respondents commented that from their point of view, Scottish Natural Heritage seemed to have a more successful relationship with the organisations that make up the natural heritage voluntary sector, and that it would be useful to understand how a similar relationship could be built between Historic Scotland and the historic environment voluntary sector.

In addition to the gaps identified by the literature review, the consultations uncovered some new areas which this research went on to consider. These included a better understanding of the age proportions of volunteers, and the approaches taken to volunteering and volunteer management.

Methodology

The fieldwork for this research took place between July and October 2008. The following methodology was agreed with HEACS before the study commenced.

Literature Review

A review of literature and research on volunteering in the historic environment in Scotland was carried out to give context to the research. As specified in the research methodology (2008:4), the review covered Scottish and UK literature, making use of both physical and electronic libraries.

Search terms used included: historic environment, heritage, culture, and volunteering. When it was found that there was little literature on volunteering in these areas, the search was widened to include museums and the natural environment.

This literature allowed the study to be placed in context and to identify the extent to which the study could fill existing evidence gaps.

Consultation

To inform the research, and to give some idea of current issues in the historic environment sector, a number of 'consultation' telephone calls were undertaken with a sample of individuals in historic environment umbrella bodies. These individuals were chosen based on their position within those organisations, and as prominent specialists in their field. These conversations were unstructured and covered the individuals' views of volunteering in the historic environment, and what they would like to find out from the research.

Themes from these conversations were compared with findings from the research literature, and helped inform topic guides for the case study interviews.

Database Development

The research aimed to identify and survey volunteer-involving organisations in the historic environment sector. Initially HEACS provided a database of 392 historic environment organisations and stakeholders. A key piece of work in the early stages of this research was to ensure that the database was comprehensive, and to encourage volunteer-involving organisations in the sector to take part in the research.

A set of keywords were developed and used in the various searches: *historic, archaeology, architecture, built, monument, landscape, townscape, marine, trust, preservation, heritage, building, conservation, and friends.*

The database was compiled using the following sources:

- The initial HEACS database of stakeholders;
- Lists of local authority archaeologists and conservation officers provided by HEACS;
- Data provided by the Scottish Council for Voluntary Organisations on keyword searches;
- A keyword search of the Volunteer Development Scotland membership and stakeholder list;
- A keyword search of the Volunteer Scotland volunteering opportunities portal;
- Web searches of larger historic environment websites for partner organisations and funded projects. These included:
 - The Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS)
 - Scotland's Rural Past
 - Archaeology Scotland
 - Built Environment Forum Scotland (BEFS)
 - Scottish Civic Trust
 - Association of Building Preservation Trusts
- Internet searches of local authority websites for relevant departments and local groups;
- Lists of local groups provided by some local authority staff;
- An internet search of the Office of the Scottish Charity Regulator (OSCR) website using the keyword search criteria;
- Web searches of Heritage Lottery Fund grant recipients;
- Web searches of respondents to relevant Scottish Government consultations;
- 'Snowballing' of the research in local areas (we had contact from some individuals who had completed the questionnaire on behalf of one organisation, but had involvement in, or links with other relevant local organisations); and

- Using the data returned from Q26 of the questionnaire “Please list any historic environment networks and/or volunteering networks with which your organisation or group has contact”.

Responses were screened to reduce instances of ‘double counting’, for example, ensuring volunteers were not counted at both the branch and national level of organisations or programmes.

Elements of the sampling strategy, for example, particular search terms and ‘snowballing’, were used to ensure that the resulting database of volunteering-involving organisations in the historic environment sector across Scotland was comprehensive. By the end of the exercise, there were almost 900 volunteer-involving organisations on the database.

Given the emphasis in the sample on voluntary and volunteer-involving organisations, this study is not able to comment on the proportion of voluntary and volunteer-involving organisations relative to the historic environment sector as a whole.

Questionnaire

A questionnaire (see Appendix One) was developed in consultation with HEACS. It drew on the questionnaire used for a similar audit of volunteering in the natural heritage in 2005. The questionnaire was designed to investigate:

- The format of volunteering across different types of organisations in Scotland;
- The types of organisations that are involving volunteers and the number of volunteers they involve;
- The roles volunteers play in organisations; and
- The volunteering policies and practices that volunteer-involving organisations have in place.

It was anticipated that these would meet the project aims and objectives of establishing a baseline of volunteering activity, and identify opportunities to support volunteering and volunteer management in the historic environment sector.

Questionnaire Distribution

The questionnaire was posted out to all 897 organisations on the database during July and August. All the questionnaires were numbered before posting so that returns could

be monitored. A letter from HEACS explaining the purpose of the research and a freepost envelope were provided, and a return date of the 5th September was set. This date was later extended to allow organisations who were sent a questionnaire in late August or early September time to respond. To ensure that the research remained manageable within the timeframe, it was decided that rather than pursuing all non-responses, HEACS would provide a list of those they thought were significant volunteer-involving bodies (based on their knowledge and understanding of levels of volunteering in particular organisations), and these people were encouraged to respond accordingly.

As mentioned under database development, the questionnaire was also used to find local networks and organisations, and questionnaires were sent to those noted under Q26 by respondents.

To encourage a high response rate, a prize draw to win a Fair Trade hamper was advertised on the questionnaire. This was won by the Tayport Old Kirk Charitable Trust.

Questionnaire data analysis

The data collected from the questionnaires was entered into SNAP Survey Software for analysis. Initial analysis involved reporting the frequency of answers. Further to this, data was cross-tabulated to see relationships between different types of data. The main variables used for cross-tabulation were:

- Organisation income;
- Organisation size;
- Organisation activity;
- Sector; and
- Volunteer activity.

Case Studies

A sub-sample of respondent organisations was followed up for more in-depth analysis by means of a telephone interview. The interviews were designed to be semi-structured and a topic list was provided in advance of the interview (see Appendix two). The format of the interviews was flexible enough to allow for any additional information to be gleaned if relevant to the study. The interviews aimed to generate descriptions of:

- The structure of volunteering and volunteer management in the organisations;
- How organisations are working on volunteer-related policies;
- The training provisions and any unmet needs within organisations;

- The support needs of organisations;
- Any impact of external policies and regulations;
- Existing examples of, and opportunities for, joint working; and
- The challenges that affect organisations.

It was anticipated that the case studies would help to meet the research aims of identifying opportunities to support volunteering and volunteer management in the historic environment sector.

The case study topic list was informed by volunteer management literature (McCurley and Lynch, 1998) and the iV standards (see Appendix Four).

Sample selection

Six case study organisations were chosen from respondents based on a sampling matrix of size (defined by income) and sector as follows:

- The eight 'annual income' groups were merged into four income groups:
 - No income;
 - Small – up to £50,000 per annum;
 - Medium – £50,001 to £500,000 per annum; and
 - Large – over £500,000 per annum.
- Three sectors:
 - Voluntary/community;
 - Public; and
 - Private.

The activities undertaken by each organisation were then added to ensure that a range of different organisations were represented.

The organisations selected were labelled to ensure anonymity and represent the respondent pool at the time of selection. The organisations chosen are as follows:

<u>Income/Sector</u>	Voluntary	Public	Private
No Income	A		
Small (<£50,000 p.a.)	B, C		D
Medium (£50,001 – £500,000 p.a.)		E	
Large (over £500,001 p.a.)	F		

The organisations in the sample were initially contacted by telephone to explain the purpose of the case studies and to ask if they were willing to participate. Once agreement was given, a suitable time was arranged and a copy of the topic guide was provided in advance. The interviews took place in September 2008 and were carried out by a member of the research team. Interviews lasted around 45 minutes and were recorded and later transcribed. A copy of the transcript was provided to participants for approval before the information was used in this report.

Data Analysis

The data was analysed to identify recurring themes, and to identify descriptions of processes or activities which revealed the more complex realities behind the quantitative findings. Relationships between codes were not explored.

Scope and Limitations

The research findings are specific to the organisations which took part (and by doing so, identified themselves with the definitions implied). The findings should therefore not be generalised to a wider population.

Given that few organisations are gathering data on volunteers (which is in itself a significant finding), some of the answers provided are estimates and should be regarded as a best estimate rather than a true count.

The Research Findings

Respondent Organisations

The database totalled 897 organisations; all were sent a questionnaire. Of those organisations, a total of 233 returned questionnaires. This equates to a 26% response rate. It is important to note that not all respondents answered all questions. To ensure clarity of level of response for each question, a note of the number of responses is given for each table of data.

A series of questions were included at the start of the questionnaire to identify the types of organisations which had responded. These included questions on:

- The name of the organisation or group;
- The main purpose of the organisation or group;
- The activities undertaken to fulfil this purpose (in Scotland);
- Annual income;
- Sector (voluntary/community, public or private);
- Status (company limited by guarantee, unincorporated, trust or other);
- Volunteer involvement.

Types of organisations

A wide range of organisations took part in the research. This ranged from national historic environment organisations to small local history societies and included local authority departments, university departments and preservation trusts. It was interesting to note that within the local authorities, responsibility for the historic environment resides in a great range of different departments – we had responses from archive departments, heritage trusts and culture departments, as well as libraries and planning departments.

The majority of research participants were local organisations – friends of a local monument, local history societies, local heritage groups and local archaeological groups. This is important to note as it provides a setting for some of the research findings, particularly around who volunteers and how volunteers are supported and managed.

Organisation purpose

This was an open-ended question which allowed organisations to write their response freely. From this, it was possible to form an understanding of the different functions of organisations participating in the research.

Many organisations described their purpose as to; conserve, preserve, restore, protect or enhance an aspect of the historic environment:

"The saving and restoration of Belmont House on the island of Unst, Shetland"

"To preserve the crofting way of life through the furnishings, implements etc in a typical Caithness longhouse of yesteryear"

Other organisations described their purpose as providing support or education:

"To provide advice, practical experience and training for the repair of Scotland's traditional buildings"

"To provide formal and informal education concerning Scotland's archaeological heritage"

Many organisations undertook to carry out specific excavation or interpretation work:

"Carrying out a full archaeological survey of Glen Tanar Estate"

"Interpretation of the monastic settlement with displays of archaeological finds"

Others were involved in outreach and awareness raising:

"We seek to foster interest in and knowledge of the architectural and historical importance of all places of worship"

"To create an awareness of the maritime heritage on the Clyde and to support the objectives of the Clyde Maritime Trust in its educational work"

Archiving local history, including family history, was also a common theme:

"Compiling an archive of local history (photographs, documents, artefacts)"

"To provide access to local history through our Heritage Centre; this is also a base for family research"

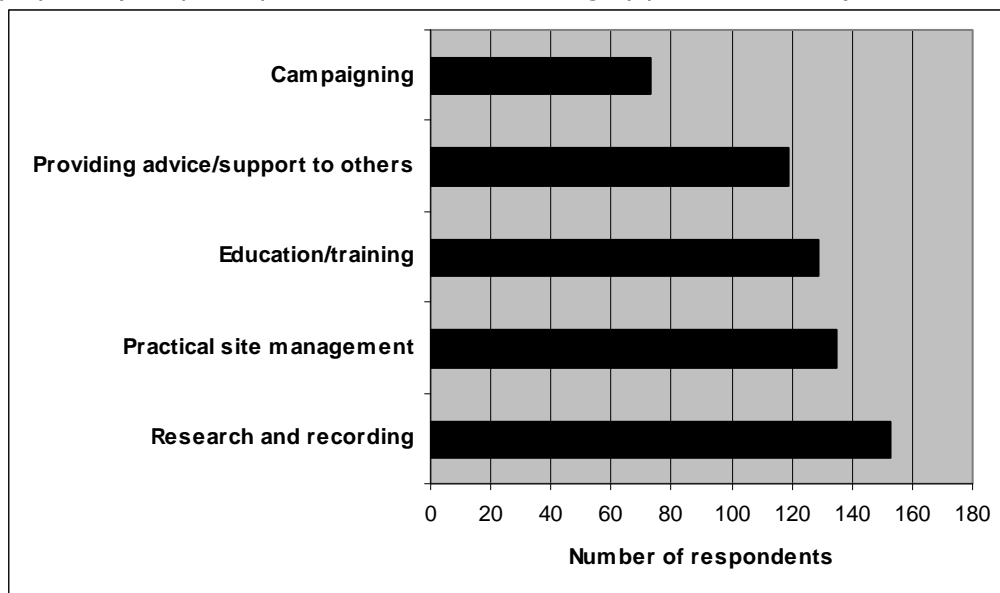
Activities undertaken (Figure 1)

Generally, organisations undertake more than one type of activity to fulfil their purpose. Of the list provided to respondents, research and recording was the most common purpose. Of those which undertake practical site management, 64% do this on one site, while the other 36% work on multiple sites. Other activities included:

- Providing funding to other organisations;
- Project management;
- Publication of journals and papers;
- Promotion of the historic environment or a specific site;
- Entertainment/visitor attractions;
- Consultancy.

It is of note that no one activity dominated amongst respondent organisations; there appears to be a reasonable spread of activities across the sample.

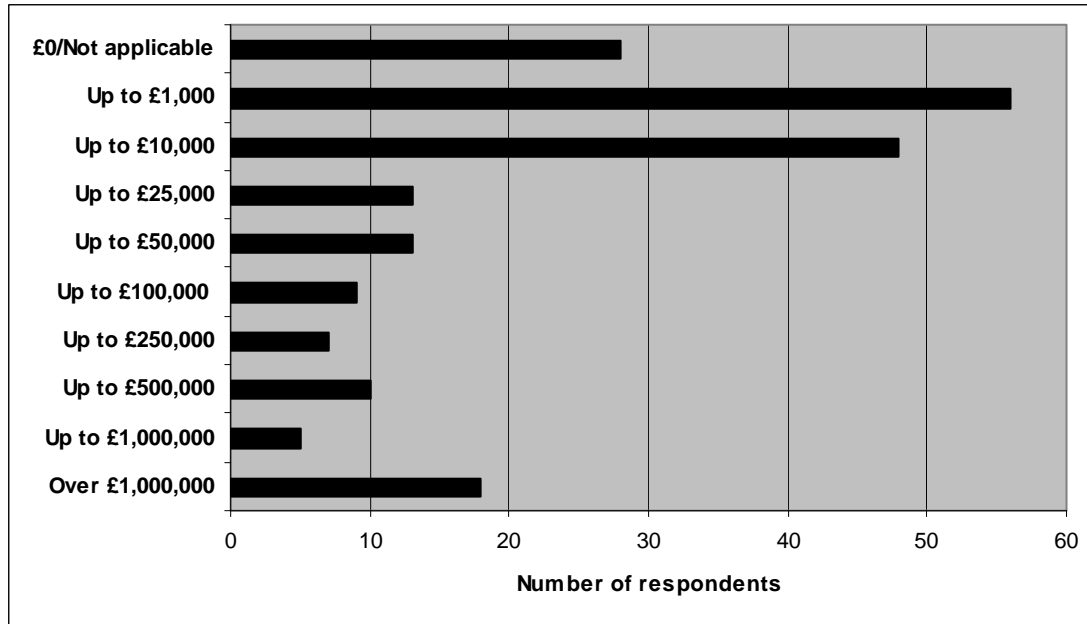
Figure 1: Q3 What activities does your organisation or group undertake in Scotland to fulfil this purpose? (Multiple responses allowed, 'other' category provided, n=216)



Annual income (Figure 2)

The majority of respondent organisations (64%) were in the lower income brackets of £0, up to £1,000 and up to £10,000. This information provides a measure of the size of respondent organisations and can be used to analyse the other data collected in the questionnaire by organisation size.

Figure 2: Q4 What is the annual income of your organisation or group in Scotland?
(Single response, 'other' category provided, n=207)



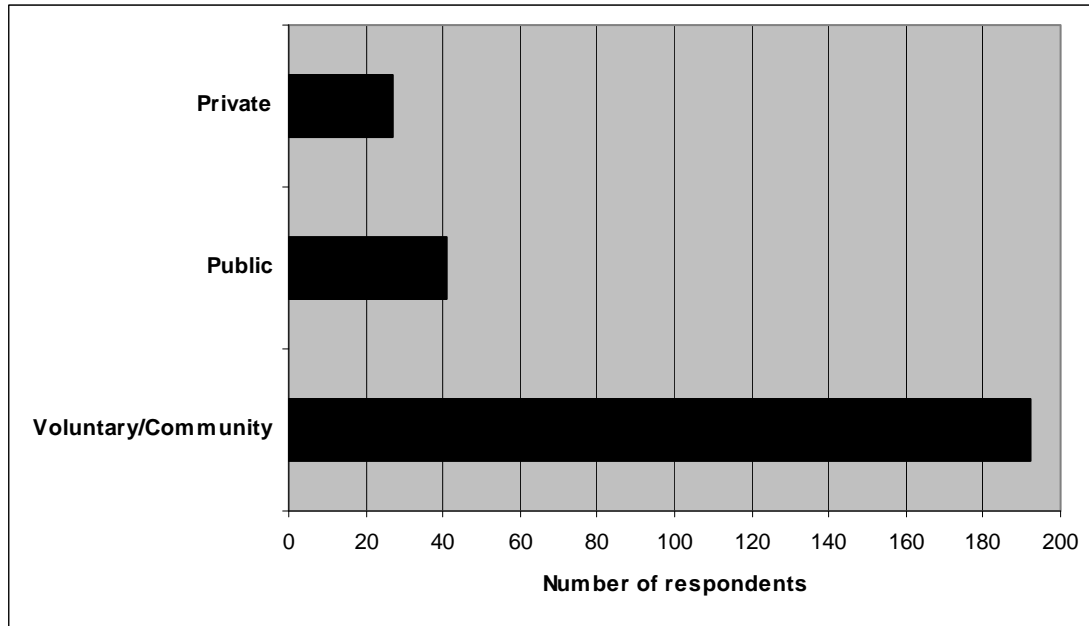
It should be recognised that this data is a snapshot, and that organisation income will vary from year to year, particularly where funding is mainly through specific projects. Some organisations gave detail of where their funding came from:

- Membership fees;
- Fundraising/donations;
- Grants;
- Capital projects; and
- Publication sales.

Sector (Figure 3)

The majority of respondent organisations are working in the voluntary/community sector – around 74%. This is similar to research findings in 2004, which demonstrated that around 76% of Scotland’s volunteers overall work in the voluntary/community sector (VDS, 2004).

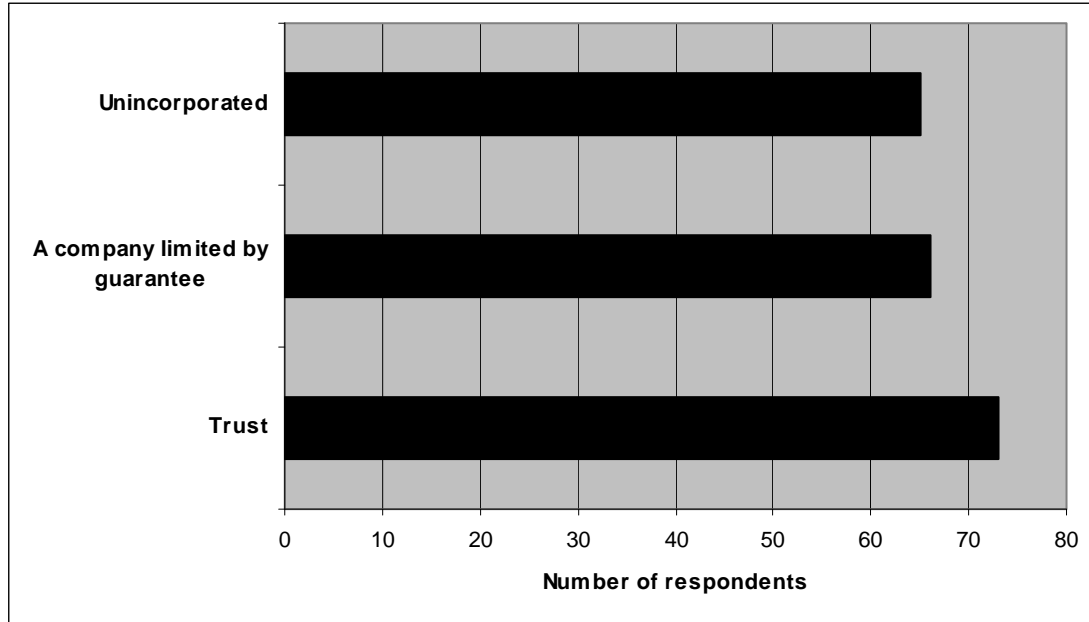
Figure 3: Q5 In which sector does your organisation or group work? (Single response, n=228)



Status (Figure 4)

Figure 4 shows that there is no dominant organisation status amongst respondent organisations. Other organisations specified that they were a public body and did not therefore fit the categories provided.

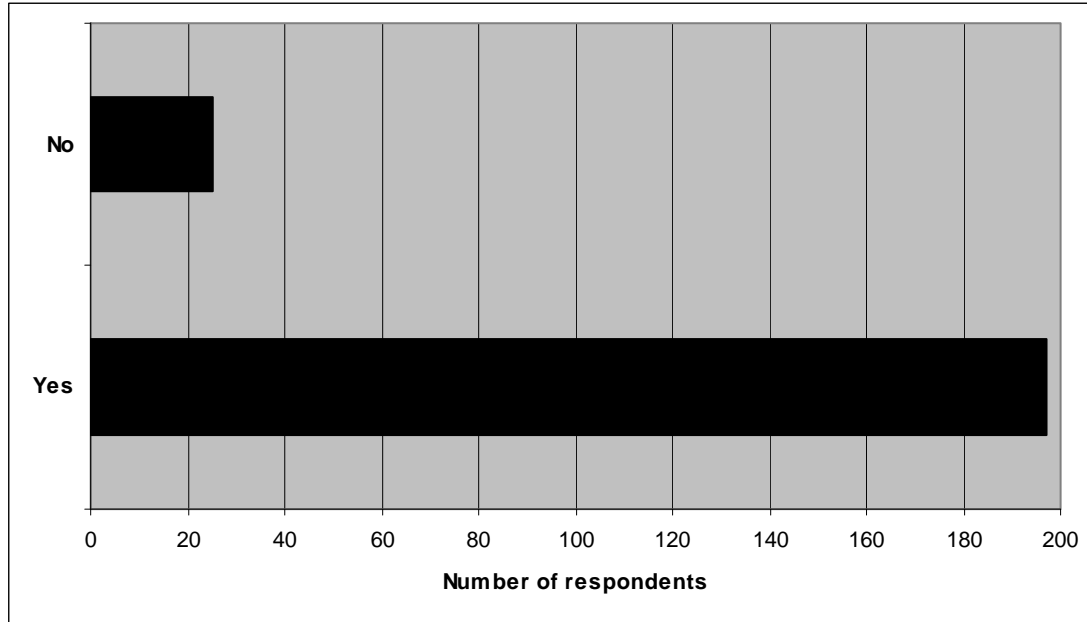
Figure 4: Q6 Is your organisation or group a company limited by guarantee, or unincorporated? (Multiple responses allowed, 'other' category provided, n=191)



Volunteer involvement (Figures 5-6)

Respondents were asked to specify whether they currently involved volunteers (**Figure 5**). If they said yes, they were asked to continue to answer a series of questions about volunteer involvement. If they said no, they were asked whether they planned to involve volunteers in future and then directed to the end of the questionnaire where they were asked about their networks and where they went for support. It is important to note that it remains unclear whether the 664 non-respondent organisations involve volunteers.

Figure 5: Q7 Does your organisation or group currently involve volunteers in Scotland? (Single response, n=222)



Just over 10% of respondent organisations said that they did not currently involve volunteers in their work. The remainder do involve volunteers, and many went on to provide details of volunteer numbers and volunteer management practices which will be detailed in the next section of the report.

The way in which the database was populated, i.e. mainly through 'volunteering' sources, may have resulted in the high number of volunteer-involving organisations taking part in the research. Further information on this is contained within the methodology.

In addition, the high number of voluntary sector participants (see **Figure 3**) suggests high levels of volunteer involvement, even if solely at a board of director level.

Just over 12% of organisations not currently involving volunteers said that they planned to involve volunteers in future (**Figure 6**). For example, one said that they would like to develop volunteer activities while another suggested that volunteers might get involved in casework:

"It is an area of activity we would like to develop"

"Possibly - might arrange a visit or undertake casework?"

Others explained that they did not directly involve volunteers for a variety of reasons, including lack of staff capacity, the need for a skilled workforce, or the type of organisation:

"With only one employee fully occupied, no chance of managing volunteers"

"The restoration work is very highly skilled. The contractors use trainees but unskilled volunteers could be a danger to them"

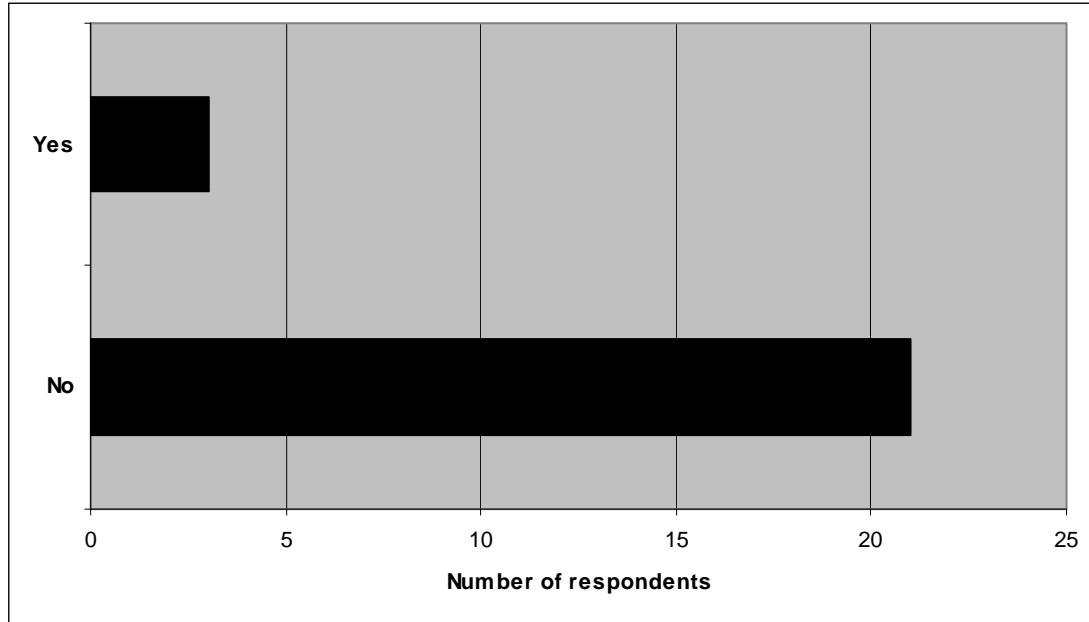
"We do not involve volunteers directly, but hundreds are used in the many projects we support"

The first two of the three comments above give some insight into perceptions of volunteer management and volunteers. The first comment seems to suggest that volunteers would have to be managed by paid staff and that the time this would require would negate any benefit of having volunteers involved. It is of course the case, as the report later suggests, that the majority of respondent organisations either have no provision for volunteer management, or the role is carried out by a volunteer themselves.

The second comment seems to suggest that there exists a perception that volunteers are unskilled. The majority of volunteer-involving organisations report that volunteers are undertaking skilled activities, such as archaeology and construction. Case study organisations suggested that some of the volunteers in their organisations were professionals or retired professionals from the historic environment sector, who wished to share their skills from paid employment with the organisations for which they volunteered.

It is notable that during the course of the fieldwork, the researchers fielded several enquiries from organisations about their eligibility to participate in the research. This was mainly around organisation leaders not recognising that individuals involved in their organisation are volunteers, despite fitting the provided definitions. Some organisations decided to take part after a conversation about their work clarified whether or not they involved volunteers, while others declined. This experience indicates that there is a lack of shared understanding in the historic environment sector of what it means to be a volunteer.

Figure 6: Q8 Does your organisation or group plan to involve volunteers in Scotland in the near future? (Single response, 'please specify' category provided, n=24)



The volunteers

The organisations or groups which answered “yes” to currently involving volunteers were then asked a series of supplementary questions. These included:

- Why they involve volunteers;
- What activities volunteers undertake;
- Levels of volunteer involvement;
- Number of volunteer hours given in the average month;
- Who their volunteers are.

Why involve volunteers?

Organisations were asked an open question about why they involved volunteers. Various reasons were given, some focussing on the needs of the organisation and others on the needs of the volunteers.

Many organisations were entirely voluntary, i.e. with no paid staff, and would not exist without the input of volunteers. Others had no funding to employ paid staff and so relied on volunteers to fulfil their aims.

"It has no funds to pay staff. It is run voluntarily by enthusiasts"

"The contribution made by volunteers is a key part of our organisations ability to fulfil its objectives"

A number of organisations mentioned the need for the knowledge and experience that volunteers could bring to their organisation, particularly skills gained from paid employment. Some mentioned that they felt that providing volunteering opportunities enhanced their delivery, situated their work in the local community by making it locally relevant, and gave individuals the chance to experience a particular activity.

"People want to offer their time and expertise to raise the quality of delivery; many of our volunteers are people like retired professors who can contribute to raising knowledge levels"

"To undertake specific archive projects and to provide individuals with experience of archive work"

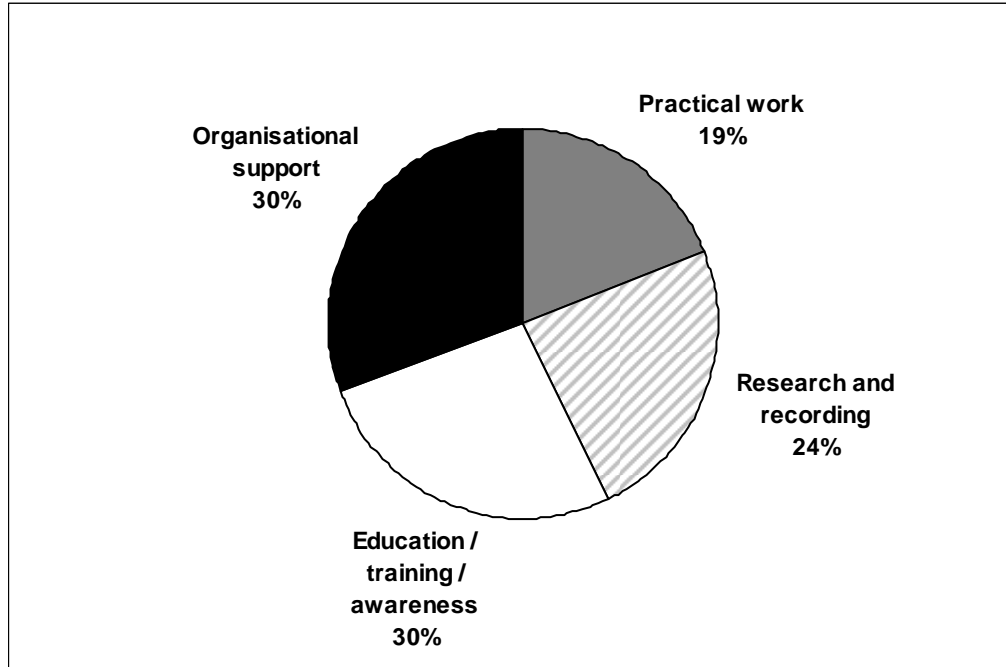
"They are a central part of our small team, they ensure involvement of local residents, they support our programme of activity, and they enrich the experience that we offer to users"

Activities undertaken by volunteers (Figures 7-8)

A list of activities that volunteers might undertake for organisations or groups was provided, based on the categories used in a similar audit of the natural heritage and approved by HEACS as equally relevant to the historic environment. Organisations were asked to select which activities their volunteers undertook.

The activities were split into four groups; practical work, research and recording, education/training/awareness and organisational support (e.g. committee work or administration). **Figure 7** below depicts the levels of activity under each of these categories; the most commonly selected being organisational support and education/training/awareness. An 'other' category was provided in this question, but on examination of responses, they were all able to be categorised under the four main headings.

Figure 7: Q10 Which of the following activities are undertaken by volunteers for your organisation or group in Scotland (Multiple responses allowed, 'other' category provided, n=190)

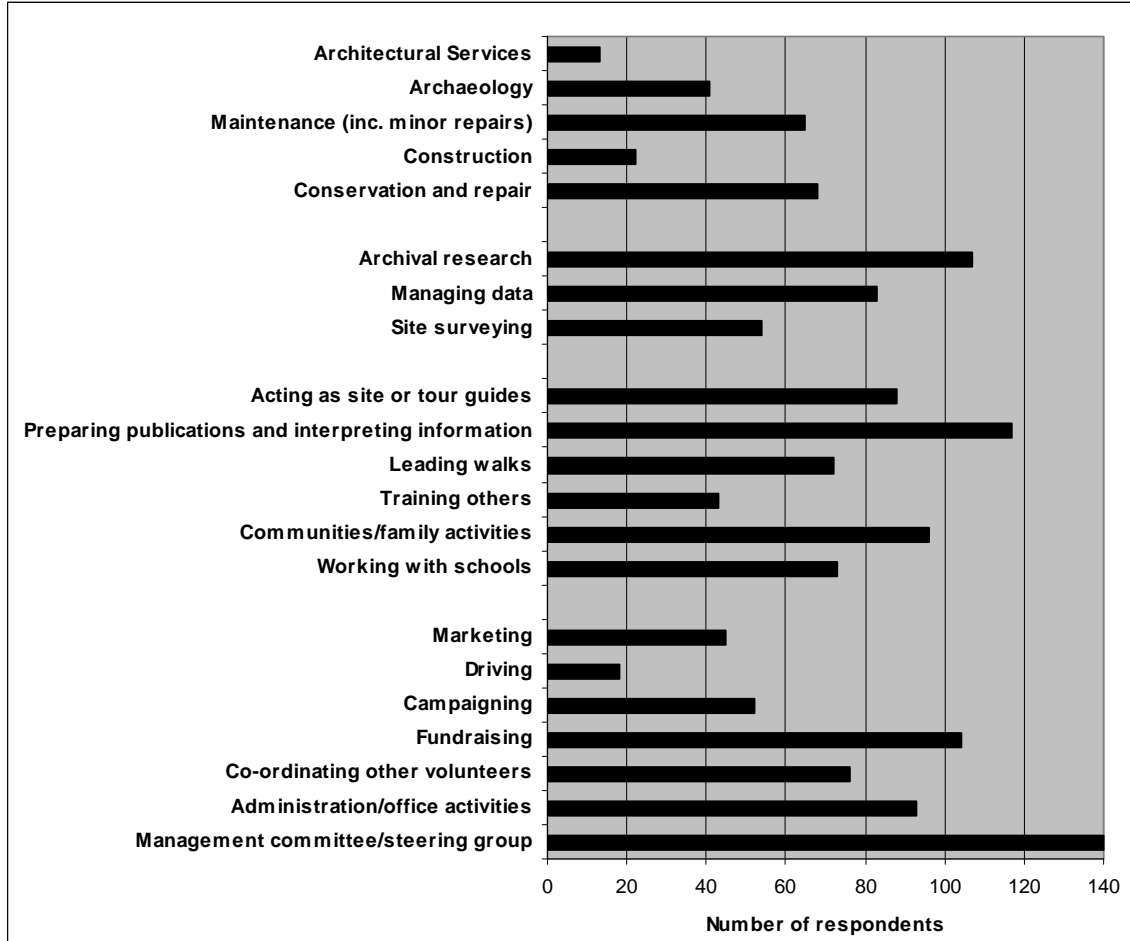


When asked specifically which activities were undertaken within these categories, a larger list was provided (**Figure 8**). The most common activity undertaken is being on a management committee/steering group. In the case of most organisations, a range of activities are undertaken, usually under more than one of the four categories (practical work, research and recording, organisational support and education/training/awareness). Activities in the organisational support category were the common denominator across the majority of organisations. Most organisations have a need for organisational support activities in addition to any 'hands on' work that they might do to fulfil their aims, which may explain the high level of responses selecting those activities.

In addition to the list of activities provided, respondents identified other activities undertaken by volunteers. These included:

- Giving talks;
- Events organisation;
- Arranging outings;
- Consultation;
- Live history displays; and
- Website development/maintenance.

Figure 8: Q10 Which of the following activities are undertaken by volunteers for your organisation or group in Scotland (Multiple responses allowed, 'other' category provided, n=190)



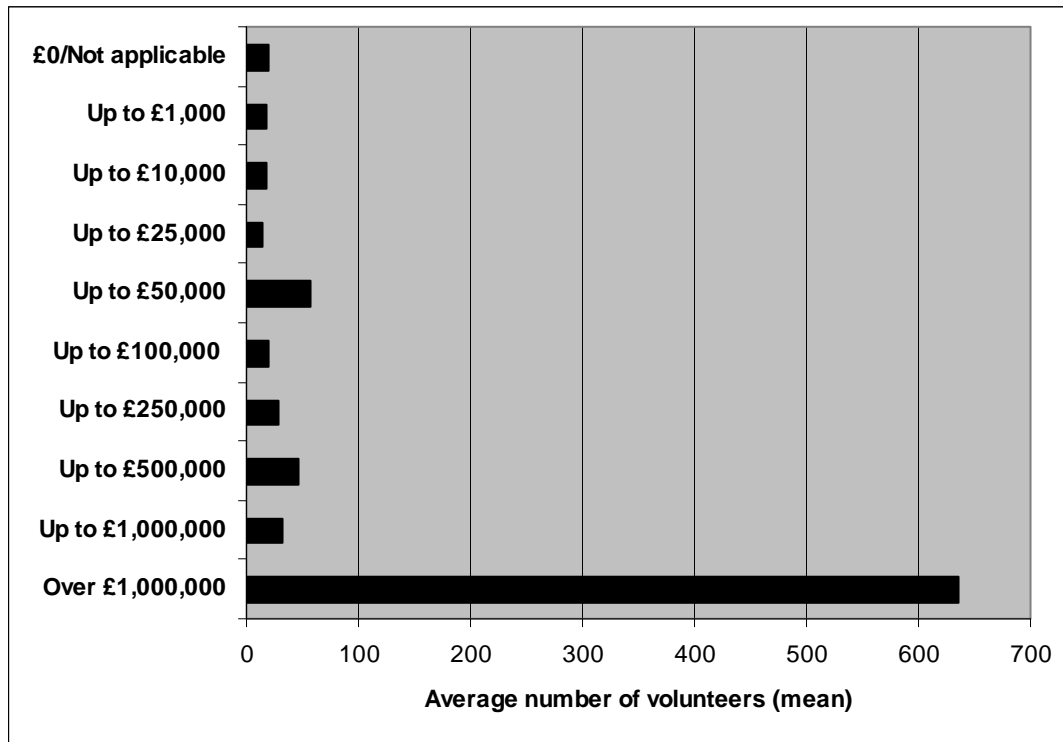
Volunteer numbers (Figures 9-12)

Respondents were asked to provide information on the number of volunteers *actively* involved in the activities of their organisation or group in the past year or six months. It is important to note that in some cases, numbers may be an estimate.

Of the 171 respondents who answered this question, a total of **13,204** volunteers were reported to be actively involved. The number in each of the organisations varied widely, ranging from 1 to 4,100 volunteers. In further discussion with organisations, it appears that some volunteers are involved in a number of different groups and activities – it may then be the case that the 13,204 are not 13,204 separate individuals, but do represent the number of individual volunteer contributions.

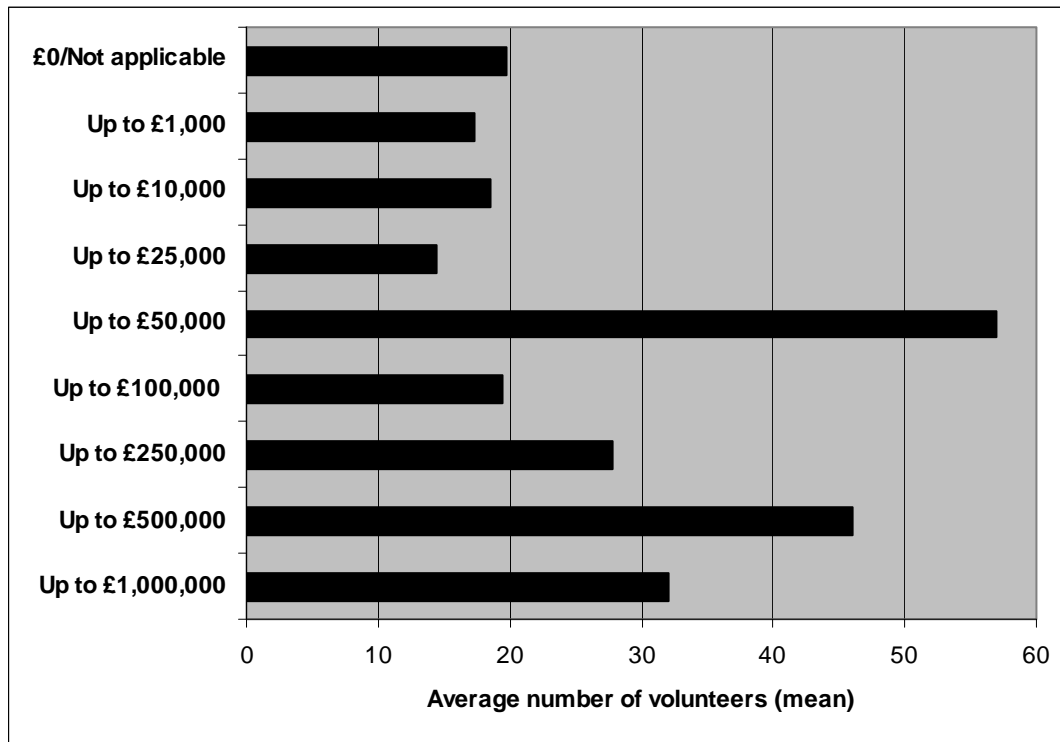
Figure 9 shows the distribution of these volunteers across the different organisation sizes (i.e. levels of income). The average (mean) number is shown on the graph. The highest number of volunteers, perhaps unsurprisingly, is concentrated in the organisations with an annual income of over £1,000,000.

Figure 9: Q11 At present, how many volunteers are actively involved in the activities of your organisation or group in Scotland? (Open question, n=171)



By removing the organisations with an annual income of over £1,000,000, **Figure 10** provides a clearer picture of average volunteer involvement in the smaller income organisations – between 15 and 57.

Figure 10: Q11 At present, how many volunteers are actively involved in the activities of your organisation or group in Scotland? (Open question, n=157)



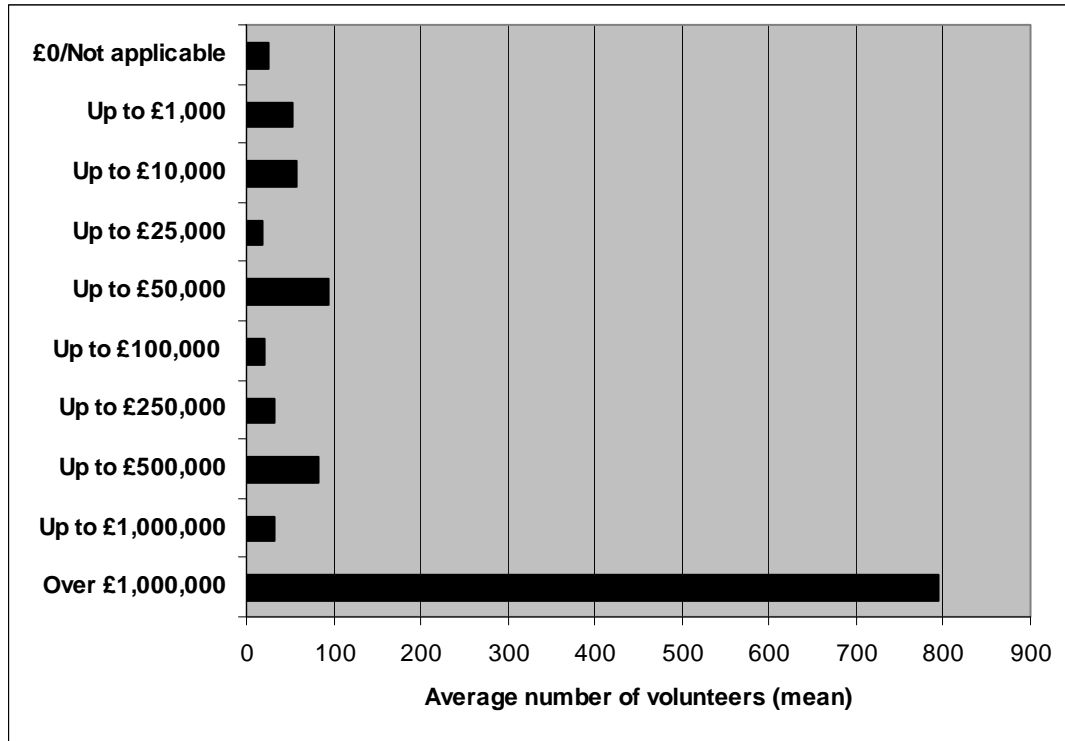
Further to this, respondents were asked how many volunteers in *total* were involved in their organisation or group (**Figure 11**). This was phrased as a total of both 'active' and 'non-active' volunteers. Of the 171 respondents who answered this question, a total of **18,564** volunteers were reported to be involved.

Many organisations provided the same number for both 'active' and 'total' volunteers, stating that they didn't have any 'non-active' volunteers. Others reported a higher number of 'total' to 'active' volunteers, suggesting that they had a number of 'non-active' volunteers. There was a minority of organisations who reported a lower number of total volunteers to active volunteers – this may suggest that people are active at one-off events, e.g. actively involved in activities in the last year or six months, but not counted as an organisational volunteer within the total reported.

There are some implications to consider around 'non-active' volunteers. Non-activity could be due to seasonality; these volunteers should still be considered and identified as part of the multitude of people supporting the volunteer work that goes on in the historic environment sector. If non-activity is due to lack of opportunity or access to opportunity with their chosen organisation or group, these volunteers could be considered untapped potential.

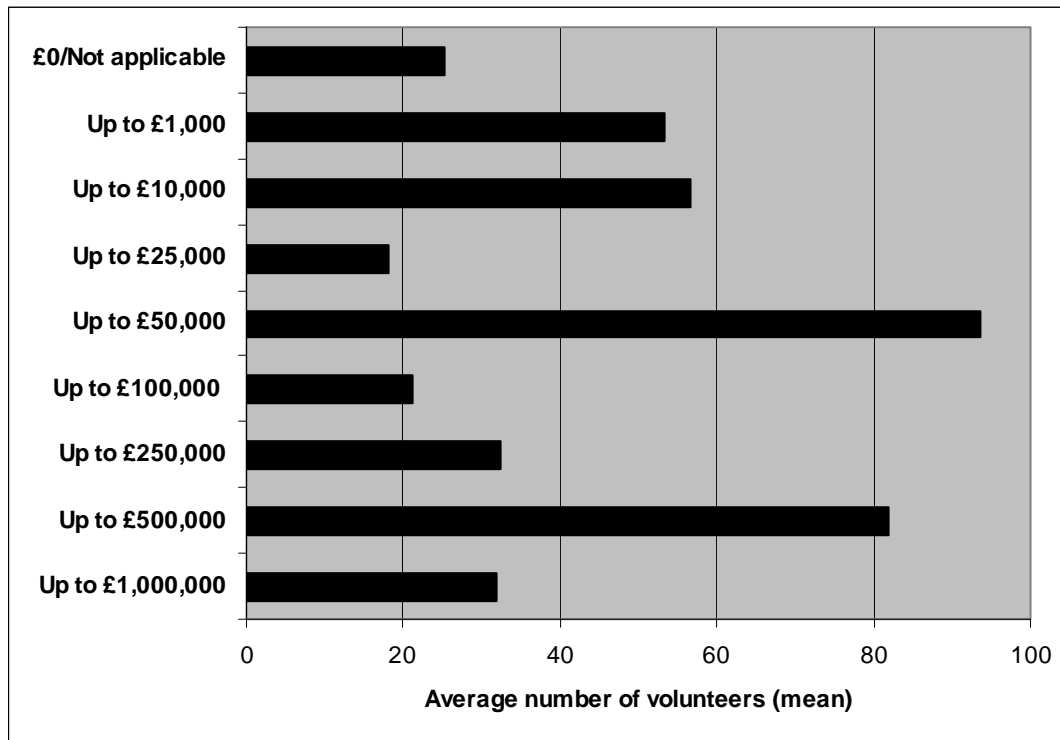
Again, **Figure 11** demonstrates that most volunteers are in the organisations with an annual income of over £1,000,000. It is apparent also that the average number of volunteers has increased across all income categories, with the exception of up to £1,000,000. The biggest increases in volunteer numbers are demonstrated in two categories: over £1,000,000, and up to £50,000.

Figure 11: Q12 How many volunteers does your organisation or group have in total in Scotland? (Open question, n=171)



By removing the organisations with an annual income of over £1,000,000, **Figure 12** provides a clearer picture of average volunteer involvement in the smaller income organisations, that is, between 18 and 94.

Figure 12: Q12 How many volunteers does your organisation or group have in total in Scotland? (Open question, n=157)



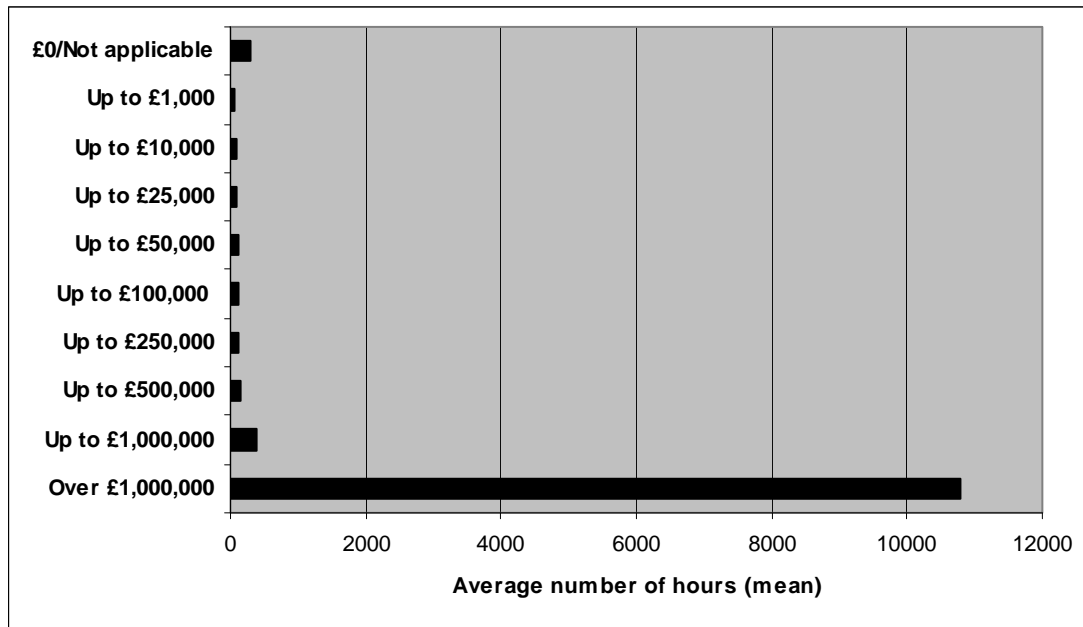
Volunteer hours (Figures 13-14)

Organisations were asked to estimate the total number of hours that volunteers gave to their organisation in the average month (**Figure 13**). Some organisations felt unable to answer this question as they did not keep records, while others made it clear that they were giving an estimation and not a definite report of hours given. In some particular organisations, there was great variance in hours given in the summer and winter months, and so these organisations made it clear how they reached their overall average monthly figure. It is important to note that numbers may be an estimate, particularly in the light of the fact that only 12 respondents reported collecting data on volunteer hours.

It is also important to note that 161 organisations answered this question. Therefore the number of hours given does not relate to the levels of volunteering reported in the previous section (n=171). However, by using the data from those organisations who answered the question on hours, and calculating the volunteer numbers accordingly, it is possible to report that a total of **167,721** volunteer hours are given by **12,449** active volunteers in Scotland in the average month. This works out at an average of **13 hours per volunteer, per month**.

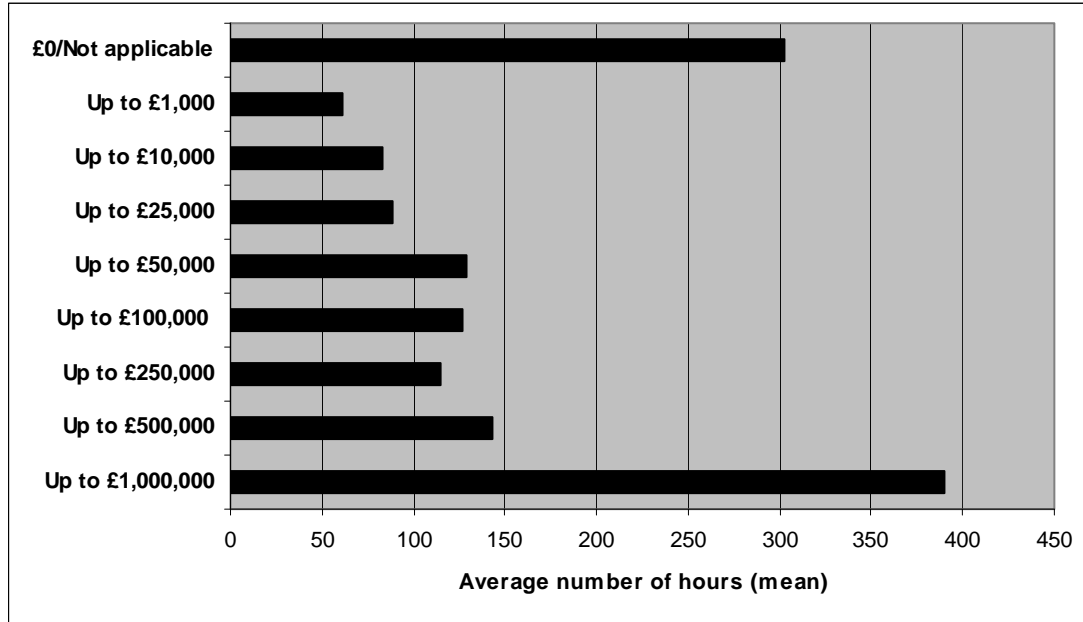
Figure 13 shows the average number of hours given by volunteers. It is of no surprise that the largest number of volunteer hours are given by those with the largest number of volunteers, i.e. organisations with an income over £1,000,000.

Figure 13: Q13 Please estimate the TOTAL number of hours volunteers give to your organisation or group in Scotland in an average month. (Open question, n=161)



By removing the organisations within this income bracket, a clearer picture emerges of volunteer hours (**Figure 14**). Although the highest reported volunteer hours are within the highest organisation income bracket, it is interesting to see the high level of volunteer hours given within organisations with no income.

Figure 14: Q13 Please estimate the TOTAL number of hours volunteers give to your organisation or group in Scotland in an average month. (Open question, n=148)

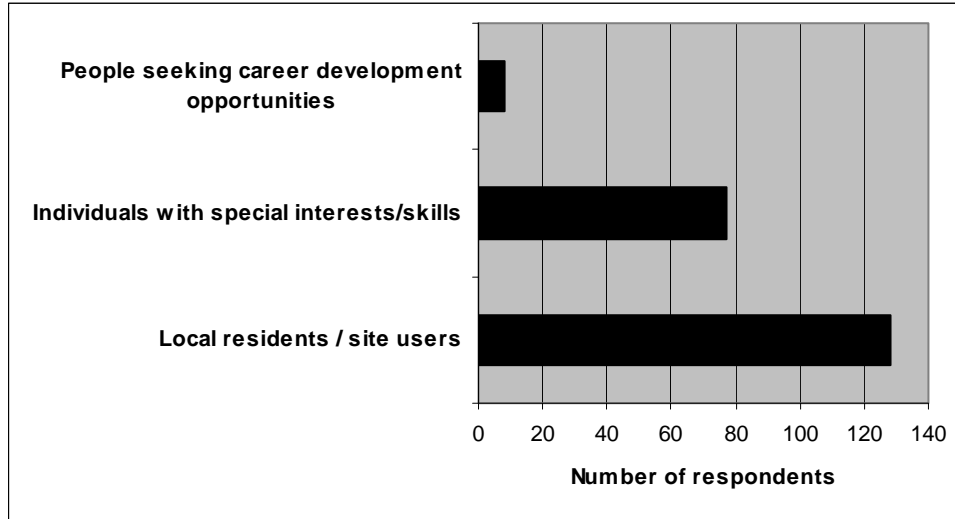


Using the average Scottish weekly wage (ONS, 2007), it is possible to calculate a notional economic value for this volunteer contribution - **£28,223,653** per annum. For a full explanation of this calculation see Appendix Three.

Who are the volunteers? (Figures 15-16)

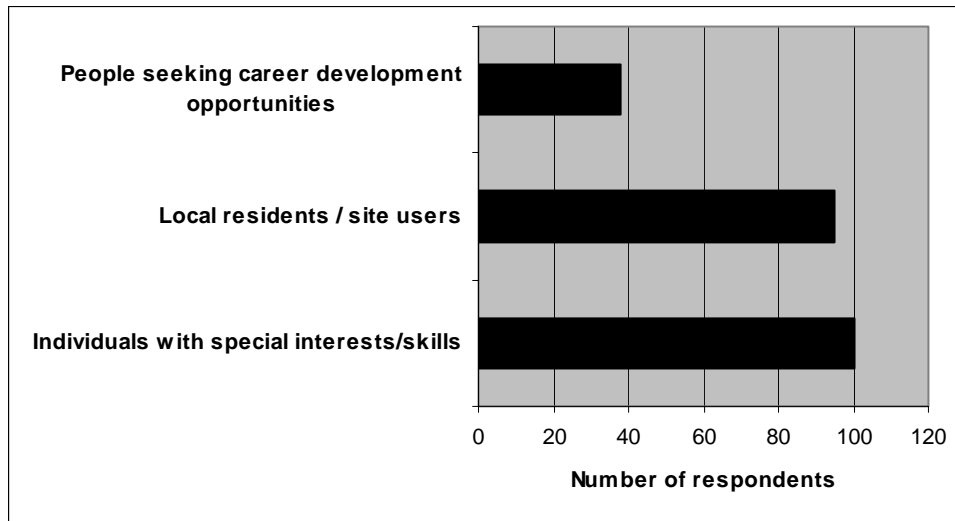
Organisations were asked to specify who the majority of their volunteers were from a list of possible options. As Figure 15 shows, the majority of volunteers are local residents or site users.

Figure 15: Q15 Who makes up the MAJORITY of the volunteers in your organisation or group in Scotland at present? (Single response, 'other' category provided, n=182)



The question was then repeated to ask what other kinds of volunteer organisations or groups they worked with (**Figure 16**). However, on reflecting on the responses, it would seem that the meaning of the two questions was confused by some respondents, limiting the robustness of any conclusions drawn from this data.

Figure 16: Q16 What other kind of volunteers does your organisation or group work with in Scotland? (Single response, 'other' category provided, n=148)



It may be the case, therefore, that respondent organisations were locally focused, and a high number of volunteers are local residents or site users. It is also the case that organisations know who their members are with regard to where they live, whereas they

may not, at least initially, know all of their skills and interests and whether they are seeking career development opportunities.

It is perhaps no surprise that organisations recognise that a number of their volunteers are 'people seeking career development opportunities'. Case study organisations have suggested that the historic environment sector is a sector where volunteer experience stands individuals in good stead for obtaining paid employment:

"...like many other sectors, you can rarely get a job unless you have volunteered. So it is often a catch 22 situation where you can't get a job without experience, but you can't get the experience unless you get a job"

Some organisations specified that they get a number of people seeking experience, such as university students on historic environment related subjects, such as archaeology. Case study organisation E (medium, public sector) noted that they had a mixture of experienced and non-experienced people interested in volunteering:

"...we provide as much or as little training as people require. So if someone wants to take part in excavation who has never done it in the past, then we will provide them with the opportunities; we will train them, we will provide them with equipment, transport (usually to the site) as well if it is our own specific project."

They further noted that:

"It can be quite a closed shop to take part in activities, in archaeology and some other areas as well."

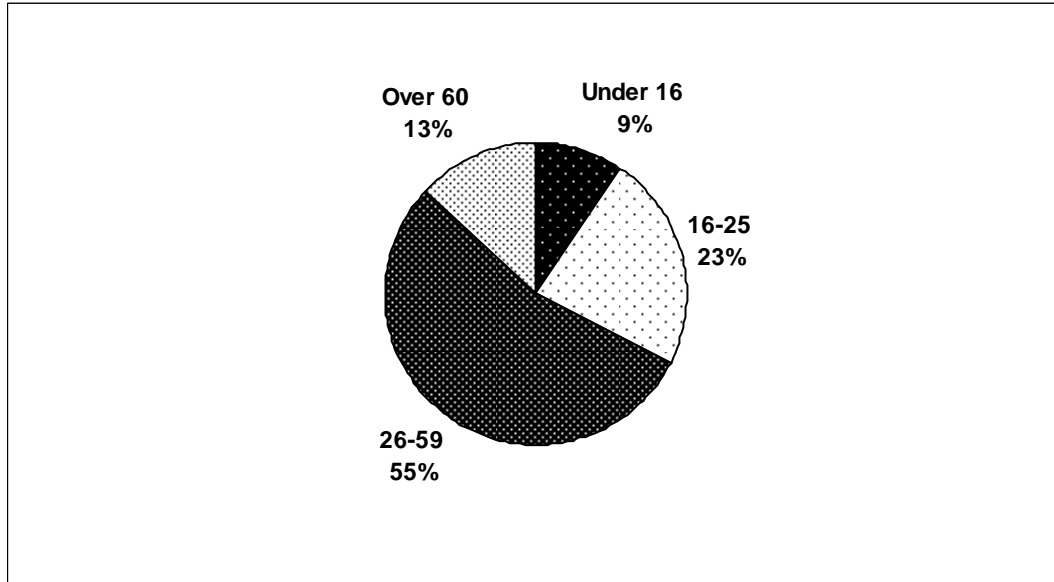
Case study organisation F (large, voluntary sector) noted that the ProjectScotland initiative was a great help to young people seeking experience in the sector:

"ProjectScotland was really helpful in that regard because people could volunteer for long enough to learn the job and move into employment."

Volunteer ages (Figures 17-18)

As some organisations gave figures in the volunteer age categories that appeared to exceed their total number of active volunteers, the proportions shown in **Figure 17** should be considered estimates. The general proportions given below can be considered largely accurate however, as it is likely that organisations have an understanding of the age bracket in which the majority of their volunteers lie.

Figure 17: Q20 Please estimate the number of volunteers in each age bracket involved in your organisation or group in Scotland. (Open question, n=192)



The six case study organisations stated that the majority of their volunteers were over 60, as demonstrated in **Figure 18**.

Figure 18: Age group proportions of case study organisations. (Open question, n=6)

Case Study	Under 16	16 – 25	26 – 59	Over 60
A	-	-	33%	67%
B	-	1%	42%	57%
C	-	-	75%	25%
D	-	-	100%	-
E	-	5%	15%	80%
F	3%	11%	43%	43%
TOTAL PROPORTION	3%	10%	42%	45%

These six organisations were asked about their volunteer demographics in the telephone interviews. Some suggested reasons for the age groups of their volunteers, or explained that retention was different across the age bands:

"When it comes to outdoor work it is practical, physical work, so they tend to be younger and still in employment; so there is a difference in the type of activities that volunteers are undertaking by age range".

"Now young people tend to disappear, for various reasons, they move away from the district or whatever. The older folk are looking for something more permanent to be involved in, they're the ones that tend to stick".

With regard to the two younger age groups, under 16 and 16-25, it seems that they are to be found across all organisation types (as categorised in question three), but more likely to be found in organisations which undertake research and recording, or education/training activities.

Volunteer management

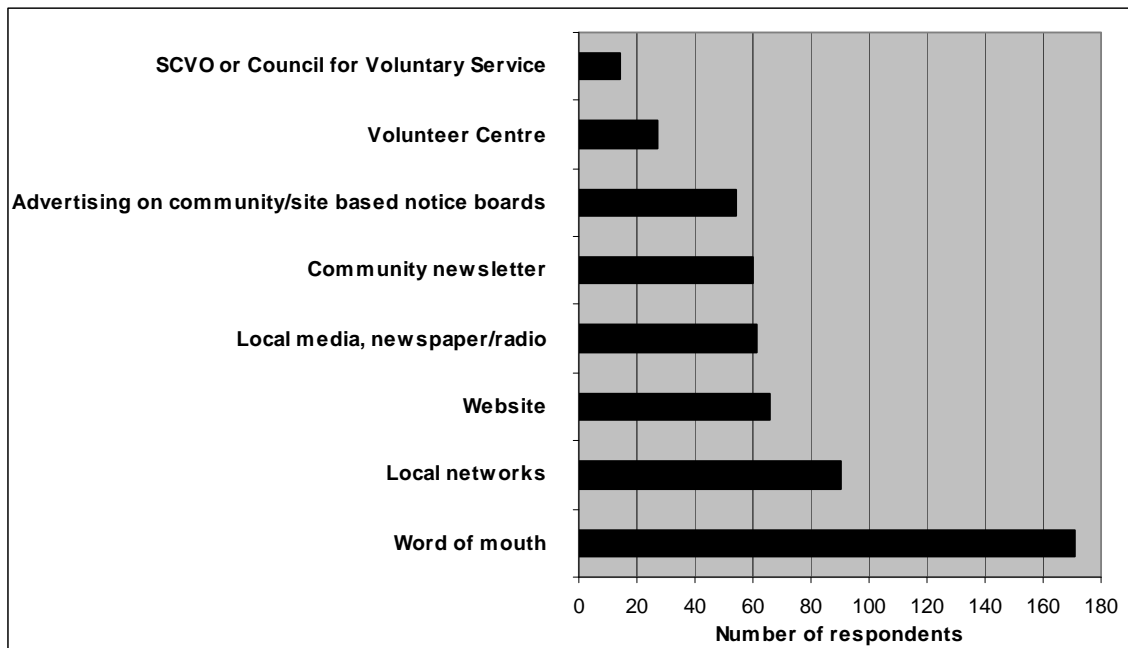
Organisations were then asked questions about their work with, and support of, volunteers. These included questions on:

- Volunteer recruitment;
- What information is collected on volunteers;
- Whether an economic value of volunteer time was calculated;
- Volunteer support; and
- Policies and practices.

Volunteer recruitment (Figure 19)

Organisations completing the questionnaires were asked to specify from a list of possible options how they recruited new volunteers. An 'other' option was available for groups to specify ways that they recruited that were not on the list.

Figure 19: Q14 How does your organisation or group recruit new volunteers in Scotland? (Multiple responses allowed, 'other' category provided, n=179)



In common with findings from general volunteering research (Danson, 2003), the most common method of recruiting volunteers is through word of mouth. When recruitment was discussed with the case study organisations, they expressed the opinion that this was the most successful method of recruitment as they were able to invite people to

participate in whatever needed doing at the time, and if people were interested and had time, they were able to help out.

Research carried out into 'asking' people to volunteer found that people liked to know specifically what is expected of them and what time commitment is involved (VDS, 2005). Case study organisation E (medium, public sector) added interested participants to a volunteer list. The list members were regularly sent details of upcoming events and asked to get in touch if they were interested. Details of what was required were made clear at this stage so that individuals could choose to participate if the circumstances suited them:

"The only thing that we ask is about general level of fitness and so on. Maybe if there is a specific time frame, for example in our work with partners, where they need someone to commit for say three days, we would check that."

Many questionnaire respondents specified that in addition to using local media, they used their own newsletters and publications to advertise for volunteers. In organisations where there was a membership and a smaller subset of volunteers, appeals would be made to the membership for any help that was needed.

Other organisations worked in partnership with local organisations to recruit or share volunteers. Depending on the activity for which volunteers were required, this had varying levels of success. One case study organisation (small, voluntary) had registered with their local Volunteer Centre, but found that they were unable to provide volunteers for the times that the organisation needed them:

"They [the Volunteer Centre] tried to get people to us but that's never been much of a success; most of their people are looking for something Monday to Friday and it's no good to us. So because we're operating weekends and maybe evenings, there's seldom been an opportunity for people. There's not an awful lot they can actually do for us; the trouble with archaeology is that it's a very specific business".

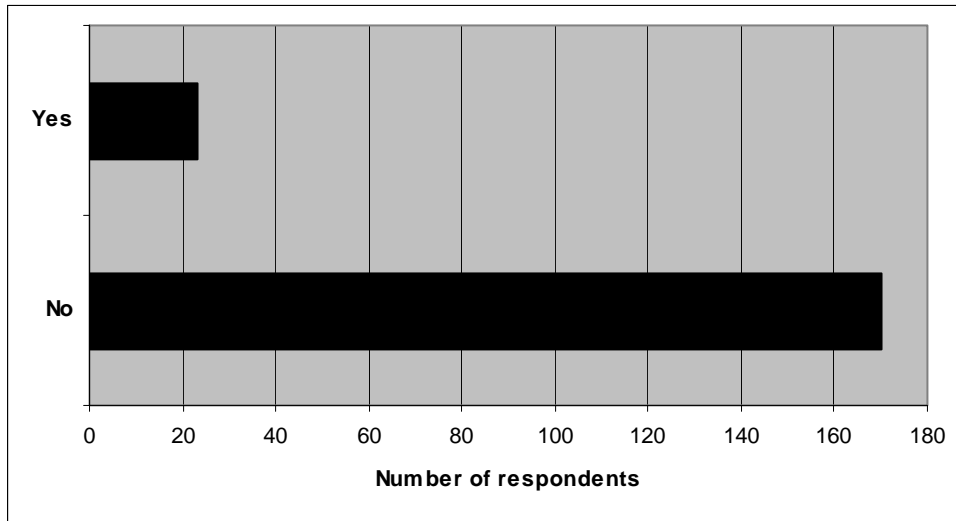
It is noteworthy that the Volunteer Scotland volunteering opportunities portal was used to find participant organisations for the research, yet the response to this question suggests that few historic environment organisations are accessing their local Volunteer Centre to recruit volunteers.

There was a theme of recruiting through school or university placements. In university placements specifically, links were made with students of subjects with a link to the historic environment.

Information on volunteers (Figures 20-21)

A small number of organisations collect information on volunteers (Figure 20). It is interesting to note that the majority of organisations doing so are in the voluntary sector; on further examination, however, a greater *proportion* of respondents in the public sector do so.

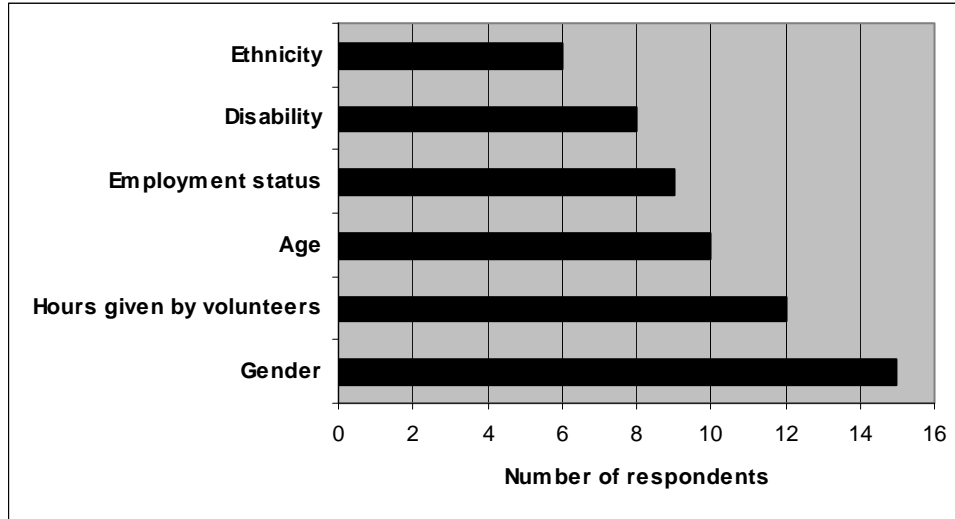
Figure 20: Q17 Does your organisation or group collect information on volunteers in Scotland? (Single response, n=193)



Many organisations stated that the only information collected was contact details and availability of their volunteers. Others collected additional information, including relevant medical information, emergency contacts, reasons for volunteering, and individual interests.

From the case study set, two of the six collect information on volunteers: organisations E and F (medium, public sector, and large, voluntary sector, respectively). Organisations which answered yes to this question were then asked what specific information they collected from a list of options, as shown in Figure 21.

Figure 21: Q18 Which of the following information on volunteers in Scotland does your organisation or group collect? (Multiple responses allowed, 'other' category provided, n=19)

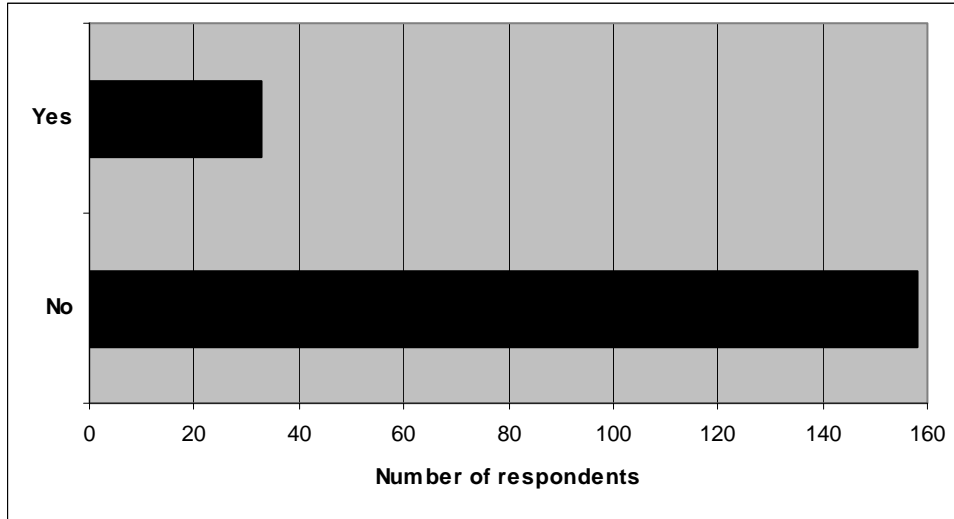


It is interesting to note that 12 organisations claim to collect information on the hours given by volunteers, and yet in the earlier question on volunteer hours, 161 organisations provided data on this. It may be the case that the question was misunderstood, or, more likely, that it was felt that 'collecting data' was a more official task than simply having an idea of how much time was spent.

Calculating economic value (Figure 22)

Figure 22 shows that a small number of organisations carry out this calculation. The majority of organisations which do so are categorised as medium or large (i.e. annual income of over £50,000). Some case study participants mentioned the need to have this information when applying for certain types of funding.

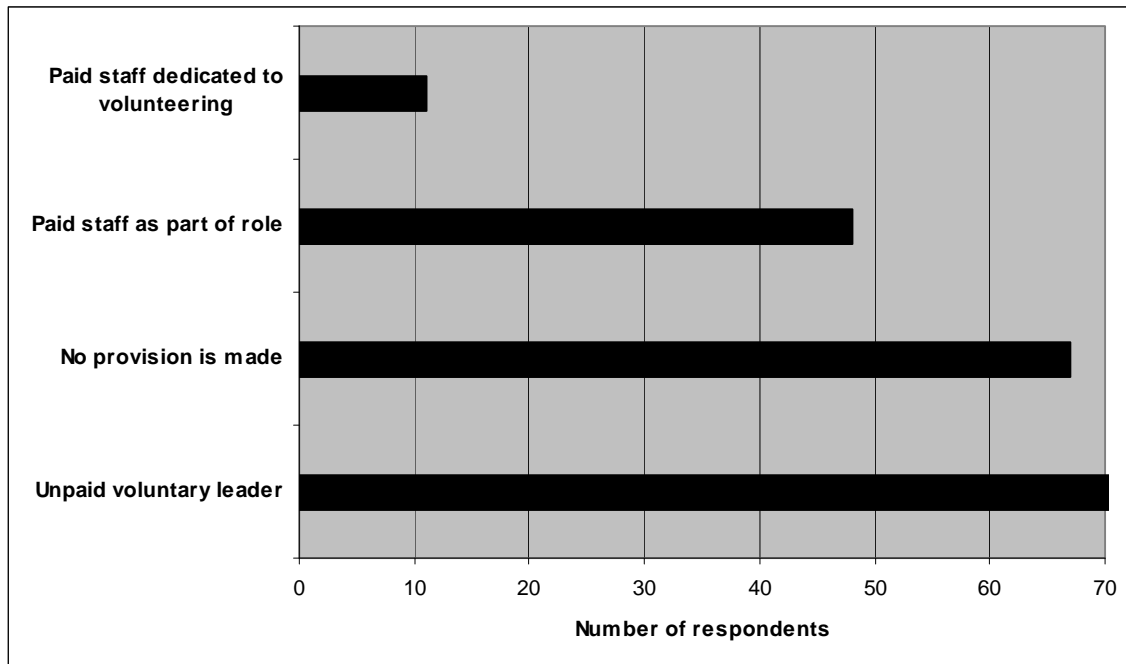
Figure 22: Q19 Does your organisation or group calculate a financial equivalent of the volunteers work/contribution to your group/organisation? (Single response, n=187)



Volunteer support (Figure 23)

Figure 23 tells an interesting story about the provision of volunteer support in organisations.

Figure 23: Q21 Who supports volunteers in your organisation or group in Scotland? (Multiple responses allowed, 'other' category provided, n=175)



Unsurprisingly, as many organisations in the sample are small and local with little or no income, there is a high proportion with either unpaid voluntary leadership, or no provision for volunteer leadership. Case study discussions on this suggested that the 'leader' position is often filled by the committee chairperson or club president. The high number of organisations where no provision is made is worthy of further consideration. In the case of small, committee-based organisations, a system of peer support may be in place, and therefore this is not recognised as a system of volunteer support. Indeed, the 'other' category in the question attracted many comments about volunteers training and supporting one another.

On further examination, it seems that the majority of organisations across the sample with a dedicated member of staff for volunteer management are of medium or large size (i.e. with an annual income over £50,000). The majority of organisations with no volunteer management provision are small.

Within our six case study organisations, there appeared to be a link between organisation size and the likelihood of having paid staff dedicated to volunteering. In case study organisation F (large, voluntary sector), there was a mix of paid volunteer managers and unpaid volunteer leaders. This adds further complexity to the picture painted by the quantitative findings.

A further theme from the case studies was that Government funding and support, particularly from Historic Scotland, could make a considerable difference to the sector. One case study respondent compared the investment in the historic environment with the investment in the natural environment by a similar Government body:

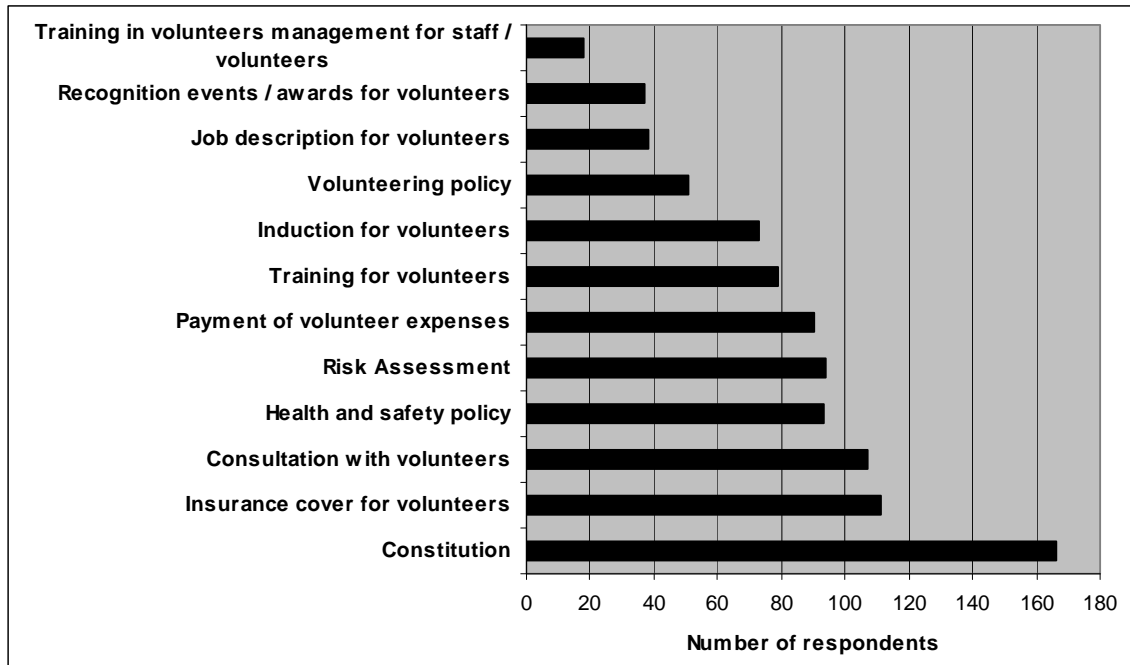
"Because I am also involved in the environment sector and see the big difference that Government funding for volunteer management in the sector is making, if the same could happen within the historic environment, it could change things quite dramatically."

Policies and practices (Figures 24-25)

The most commonly reported policy held by respondent organisations was a constitution. What is interesting, particularly in the light of the previous question, is that very few organisations (18 out of 143), report providing training in volunteer management for staff/volunteers. In the case study group, two of the six reported having training in volunteer management for staff/volunteers; these were organisations categorised with 'medium' and 'large' incomes respectively.

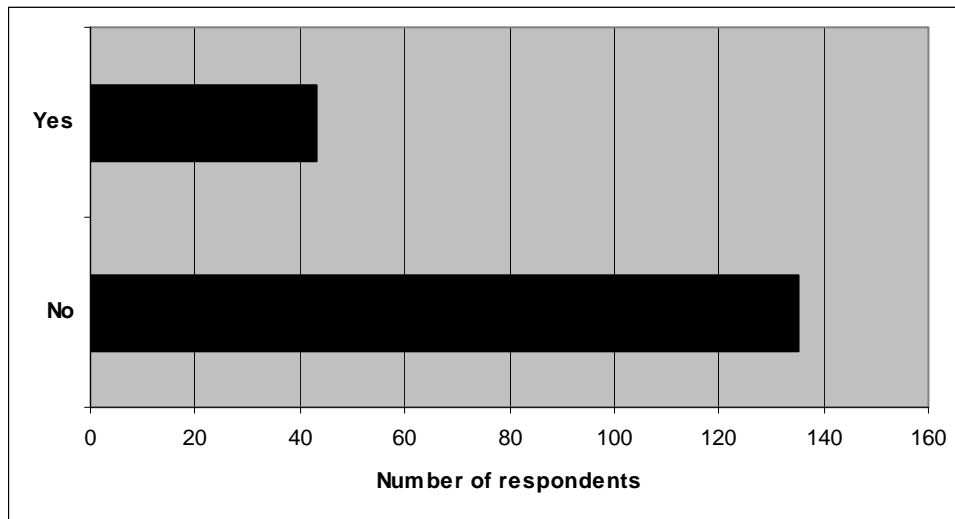
A total of 37 out of 145 organisations have recognition events/awards for volunteers. When asked further about this, a number of organisations provided information on how they recognise their volunteers. Some organisations have long service awards, some larger organisations have regional and national awards in various categories, and others have certificates, while others award free membership to serving volunteers. In addition, some have annual social events, such as a Christmas lunch, where volunteers are thanked for their contributions; and others organise 'thank you outings' for volunteers. Others show their appreciation more regularly: *"our volunteers are thanked every day and know how important they are to us"*.

Figure 24: Q22 Here is a list of possible policies and practices for volunteer-involving organisations. Please indicate below whether or not your organisation or group has these in place in Scotland. (Multiple responses allowed, 'other' category provided, n=186)



Around a quarter of organisations have a process to monitor and review their ways of working with volunteers (**Figure 25**).

Figure 25: Q24 Does your organisation or group have a process to monitor and review its ways of working with volunteers? (Single response, n=178)



Of the case study group, organisation F (large, voluntary sector) selected 'yes' to this question, and went on to specify that *"the Volunteer Policy is reviewed annually"*. One of the other case study organisations stated that they only reviewed policy when there was legislative change, while the remainder had not had policies in place long enough for them to require review, or did not currently have policies to review.

There was a sense that when policies were written, or reviewed, it was important to involve volunteers in their review, and to seek support from other organisations.

Organisational support

Finally, organisations were asked about the support to which they had access, on both volunteering and historic environment issues. This included questions on:

- Where they sought information on volunteering; and
- Any networks that they were in contact with, either volunteering, or historic environment.

Information sources (Figure 26)

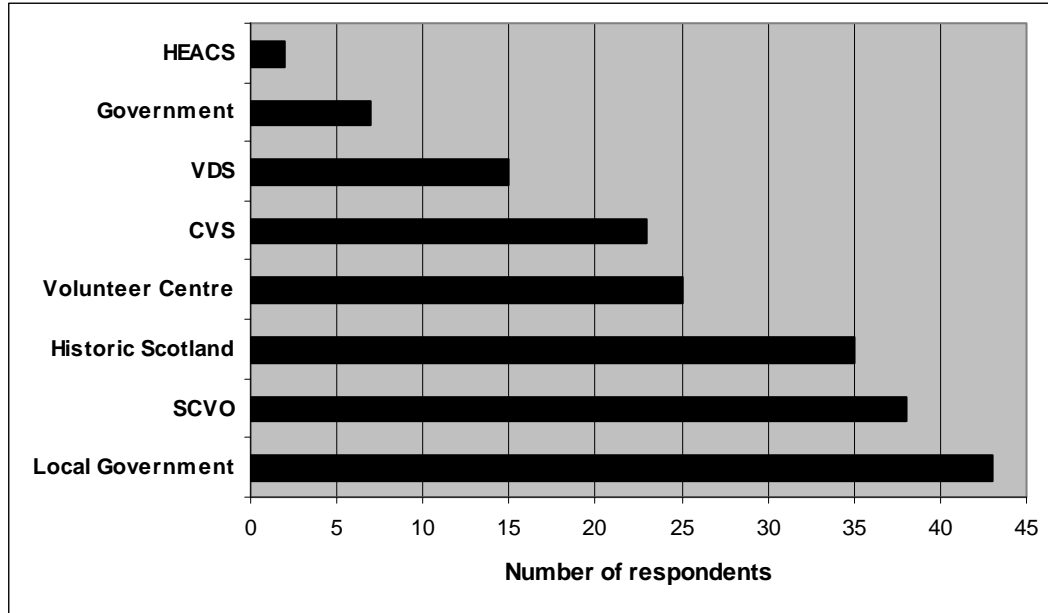
Figure 26 demonstrates that the most commonly approached source of information and advice on volunteering issues is the local authorities. The historic environment falls into a range of different departments across the different local authorities, including:

- Planning;
- Archives;
- Community Learning and Development;
- Communities; and
- Community Education.

An 'other' category was also provided in this question, which elicited a range of responses from both within and outwith the historic environment sector, including:

- The National Trust for Scotland;
- Association of Building Preservation Trusts;
- Community Service Volunteers;
- British Trust Conservation Volunteers;
- Archaeology Scotland;
- Volunteering England;
- RCAHMS;
- Scottish Enterprise; and
- Society for Archivists.

Figure 26: Q25 Where does your organisation or group go for information and advice on volunteering issues? (Multiple responses allowed, 'other' category provided, n=142)



It is notable that Historic Scotland is reported to be the primary point of contact for many historic environment organisations for information and advice on volunteering. This is interesting in light of other feedback, both from consultation responses and case studies, questioning Historic Scotland’s commitment to volunteering in the sector. The level and quality of support (other than funding) that Historic Scotland provides to organisations which seek assistance on volunteering issues remains unclear.

A further question was asked about the volunteering and/or historic environment networks with which organisations or groups had contact. Some respondents reported organisations, rather than networks, with which they have contact.

Of the 113 organisations or groups which responded, the majority reported contact with networks in the historic environment rather than volunteering. It is interesting to note that no private sector organisations and only one public sector organisation reported engaging with any voluntary sector networks for support. This suggests that voluntary sector organisations are better connected to volunteering support networks. This finding was also supported by the case study organisations where only the voluntary sector organisations reported links with volunteering networks.

Volunteering networks reported include:

- Volunteer Centres;
- Councils for Voluntary Service;

- British Trust Conservation Volunteers;
- Forum for Environmental Voluntary Action;
- Volunteer Development Scotland;
- Project Scotland;
- Association of Volunteer Managers/Scottish Association of Volunteer Managers; and
- National Trust for Scotland.

It is not immediately clear that all of these are 'networks', but this list provides a clear idea of the organisations with which historic environment groups have regular contact regarding volunteering.

The list of historic environment networks reported included some 88 separate entities. The most commonly reported were:

- Historic Scotland;
- Association of Building Preservation Trusts;
- National Trust for Scotland;
- Scottish Civic Trust;
- Archaeology Scotland; and
- Scotland's Rural Past (RCAHMS).

The remaining reported organisations could be categorised into the following groups:

- National historic environment bodies, e.g. RCAHMS;
- Local authorities, e.g. Glasgow City Council;
- Professional institutes, e.g. Institute of Historic Building Conservation;
- UK bodies, e.g. British Waterways, Council for British Archaeology;
- Local forums, e.g. Moray Heritage Forum;
- Building preservation trusts;
- Funding organisations; and
- Local archaeology societies.

Although the research did not set out to gather information on Historic Scotland (apart from where it was listed alongside other organisations in a question about possible sources of information: Q25), respondents to the consultation, case studies and the questionnaire commented unprompted on Historic Scotland. These comments described the different ways in which Historic Scotland was viewed: as a regulator, a funder or a supporter. However, much of this comment was critical of Historic Scotland's attitude to volunteering.

Many respondents to both the questionnaire and case studies stated they had received funding from Historic Scotland which enabled them to undertake important work.

Historic Scotland also funds Doors Open Day through grant aid to the Scottish Civic Trust. It is estimated that this high profile annual event involves around 4,800 volunteer helpers, who generate a total of 3,500 working days.

Historic Scotland itself involves a relatively small number of volunteers as part of its workforce, but has no central point within its organisational structure for volunteering. It was suggested that it might be helpful if Historic Scotland had a member of staff, such as a volunteer manager, who could be an 'advocate' for volunteering. Both case study and consultation respondents suggested that Historic Scotland was reluctant to involve volunteers in its own work. Despite this, Historic Scotland encourages the recipients of its grant funding to involve volunteers, allowing them to cost volunteer time as a cost equivalent.

Case study respondents suggested that Historic Scotland could be more supportive in other ways, such as sharing their expertise, resources or facilities. Some voluntary groups expressed concern that Historic Scotland did not appear to appreciate the time and expertise that volunteers donated to the sector. One respondent suggested that the agency could take "*more of a lead in volunteering*". It was mentioned by a number of consultation and case study respondents that SNH demonstrated a more positive attitude to volunteering.

Organisational Challenges

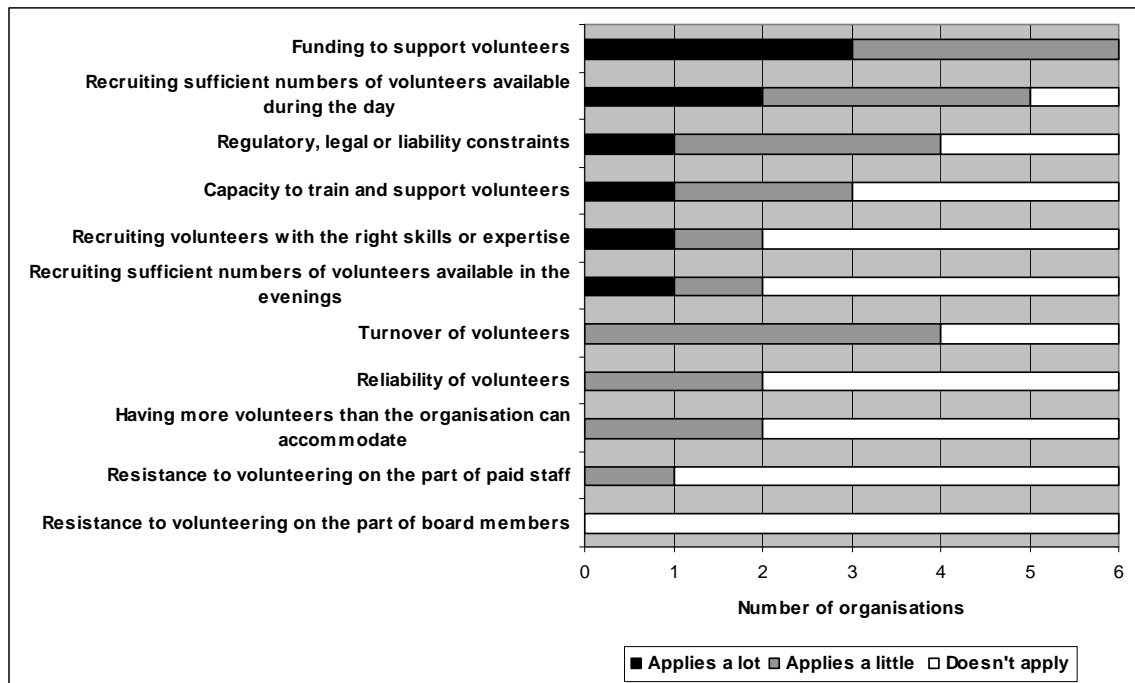
The six case study organisations were given a list of the challenges that a volunteer-involving organisation might face and asked to say whether they were applicable to them. This question was used in VDS's Volunteering 100 survey, and so the data can be compared with data collected across a wider distribution of Scottish volunteer involvers.

Challenges for volunteer-involving organisations (Figure 27)

Respondents were asked to select a response to each challenge from three options: applies a lot, applies a little, and doesn't apply.

As the graph shows, the most commonly reported challenge is funding to support volunteers. Data from the Volunteering 100 Group indicates similar trends in the challenges faced across the wider group of Scottish volunteer involvers.

Figure 27: Below is a list of possible challenges for volunteer-involving organisations. Please indicate whether each of these applies to your organisation. (Multiple responses allowed, n=6)



Across the case study organisations, there were various opinions around the issue of funding, based on the organisation's circumstances. For example, in one case, funding was devolved to local groups and there were concerns that the money might not be spent on volunteering when there were other pressures on the budget. In another,

there was concern that funding was project-based and short-term, and that without a longer-term commitment from funders, the group might not be able to continue:

"Our work can be seen as peripheral by local and central government. So the challenge is to convince the people who are holding the purse strings that there is a value in this, a wider social value, it's an important thing to try to continue."

In a further case, concern was expressed about obtaining funding for specific tasks and the impact this had on the delivery of other services and the sustainability of the organisation:

"Most of them [funding] are a one-off actually; we have a core fund which we work with. But you don't get money just to put in the bank, most people get funding for a specific purpose. And that thing has to be achieved. They want to know where the money's gone."

A further point to note from **Figure 27** is that all case study organisations were unanimous that 'resistance to volunteering on the part of Board members' did not apply. It was stated by two respondents that this was the case because everyone on the Board was a volunteer themselves.

Disbanded organisations

During the fieldwork process, four organisations which had recently disbanded responded to the invitation to participate in the research. One stated that lack of interest had led to the organisation's demise. Another felt that some of the bureaucracy around funders, Companies House and OSCR had put strain on the organisation's ability to function. The village focus of the group meant there was a limited number of available volunteers, and those available and willing had a limited amount of time. There was also comment about the onerous restrictions placed on work on scheduled ancient monuments.

Discussion

This chapter covers in detail some of the key themes arising from the research context and the research findings.

Identification with 'volunteering' and the 'historic environment'

One of the consultation interviews suggested that the fluidity of volunteering in the historic environment might make it difficult to measure with an accurate snapshot. It was also suggested that organisations may not identify with the phrase 'historic environment'. During the research fieldwork, it was noted that some organisations were not identifying individuals involved in their organisations as volunteers, although they fitted the research definition.

Volunteering is, by its very nature, problematic to measure accurately. In organisations where volunteers are managed by a volunteer manager, provided with volunteer inductions and are part of volunteer programmes, then there is more likely to be a clear understanding of the term 'volunteer'. In smaller organisations, with no organised volunteer management, the 'v' word may never be used, and the individuals concerned may not identify with the term. It is possible that this research, by defining volunteering, actually excluded organisations or individuals who would be defined as volunteers by others, but who do not view themselves this way. The same might be true of the term 'historic environment'; some historic environment organisations might not identify themselves, or the work that they do, as being part of the historic environment sector.

Despite the aforementioned issues of data collection on volunteering, this research has found a significant breadth and depth of volunteer involvement amongst respondent organisations. In summary, it has identified a total of **13,204** 'active' volunteers, and a total of **18,564** volunteers overall ('active' plus 'non-active'). It has calculated that the total of **167,721** hours, given by **12,449** volunteers in the average month, represents a value of around **£28 million**⁴ to the Scottish economy annually.

This figure of £28,223,653 is significant. To put it into perspective, Historic Scotland's annual budget is around £50 million (Scottish Government, 2008b). The funding provided by the Government, through Historic Scotland, to the historic environment voluntary sector in 2007/8 was £587,190 (Historic Scotland, 2008).

⁴ It is important to note that this is a notional (rather than a cash) figure, based on a specific number of organisations and their reported hours, using the average Scottish weekly wage as a multiplier.

If this economic value is compared with other Scottish economic data, it represents the equivalent of 0.03% of Gross Value Added (GVA⁵).

Volunteers and the sector

The essential role of volunteers

Much of the existing literature on volunteering in the historic environment emphasises the vital role that volunteers play in the sector. Without volunteer input, some organisations would cease to exist. The finding that almost 90% of the organisations which took part in the research involve volunteers gives some indication of the scale of volunteer support for the historic environment, and the very real adverse impact that a reduction in volunteering would have. In fact, 74% of our respondent organisations were in the voluntary sector, which suggests that not only would the practical work of the organisations go undone without volunteers, but that the governance component of organisations would also be severely depleted.

Reliance on local people

An issue identified by this research, but not raised in the reviewed literature, was that many organisations are locality-based, and rely on local people to support their work. In some cases, volunteering was seen to be the link with the community, demonstrating a commitment to the involvement of local people. This is no different from other sectors where volunteering opportunities arise out of a local need or issue, thereby involving local people and encouraging local ownership.

This may help to explain the reliance on the local authorities for support. Local issues often necessitate contact with, or applications to, the local authority for funding or permissions. This may raise awareness of the availability of assistance, advice and support from the local authority.

The skills of volunteers

The literature review suggested that the roles undertaken by volunteers in the historic environment were often highly skilled. The research findings on the roles undertaken by volunteers support this view, demonstrating that the sector involves volunteers in a wide array of activities of a professional nature, including preparing publications, archival research, conservation and fieldwork. The research also identified that some respondents felt that volunteers should not be allowed to become involved in skilled work. It is beyond the scope of this study to be able to comment on the quality of the

⁵ GVA measures the contribution to the economy of individual sectors or industries.

work conducted by volunteers. However, it should be noted that there is evidence to suggest that volunteers in the historic environment in Scotland are spending considerable amounts of time carrying out skilled activities.

This evidence suggests that there may be different perceptions within the sector as to what constitutes an appropriate activity for a volunteer in the historic environment. This difference may result from a lack of understanding of the abilities of volunteers, suggesting a need for further research and/or monitoring to counter perceptions. Improved volunteer training would help to realise the potential demonstrated by the sheer volume of volunteer contributions across the sector.

'Active' and 'non-active' volunteers

This research has distinguished between 'active' and 'non-active' volunteers. This distinction had been made in previous research and had demonstrated the reach of organisations in terms of both 'hands-on' supporters, and supporters who helped the organisation in different ways. Responses to questions about 'active' and 'non-active' volunteers raised some possible issues around seasonality (particularly relevant to the historic environment), episodic volunteering, and possible untapped potential where non-active volunteers could be moved into active volunteering as they already have an interest in furthering the aims of the organisation.

The uptake of good practice

Collecting volunteer data

The literature review demonstrated that there is some concern in the historic environment sector that organisations do not know much about their volunteers. The research findings here demonstrate that the majority of organisations do not officially collect data on volunteers. Despite this, many can approximate the numbers of hours spent by volunteers, which demonstrates that organisations have some level of 'unofficial' volunteer knowledge.

Larger organisations tend to have systems in place to collect volunteer data, while smaller organisations do not. It seems to be the case that where organisations have a specific need for data (e.g. for funding applications), then they will collect it. The literature reviewed suggests volunteering in the sector was unrepresentative of certain groups of the population. Systems for collecting and reviewing information routinely can help organisations to check how inclusive or representative they may be.

Engaging a diverse range of volunteers

The most common method of recruitment reported by respondent organisations was 'word of mouth'; this echoes research findings from various sectors on volunteering recruitment (Danson, 2003). There are various writings on the impact of this method of recruitment in terms of its likelihood of recruiting individuals similar in status and values to those who are already volunteers (ibid). The wider impact of this might be that groups engaging particular types of people as volunteers may be seen as 'closed shops' by others. Lack of diversity has implications for the sustainability of organisations, illustrated by the examples of disbanded organisations (p59). It is in the interest of groups (and the historic environment) to develop a range of recruitment practices in order to ensure that different types of people with a wide range of experiences and skills are encouraged to become involved (ibid).

Young People

Findings from the early context-setting part of this study suggested that young people might be under-represented as volunteers in the historic environment; that there was a need to engage young people to ensure the sustainability of organisations; and that the sector might not 'fit' with the interests of young people. It is interesting to note, therefore, that the subsequent research found that around 23% of volunteers in the historic environment were in the age group 16-25. Further analysis of this finding suggests they are more likely to be found in organisations that undertake research and recording, or education/training.

Case study comments suggest some wider issues around the involvement of young people, namely that they tend to prefer physical work, that young people are less likely than their older counterparts to stay involved over long periods of time, and that many young people need voluntary experience to pave the way to paid employment in the sector. It is to be expected, therefore, that organisations which take due consideration of the motivations and needs of young people might be more successful in engaging them to become involved in volunteering in the historic environment.

The inclusion of young volunteers in some organisations and not in others suggests that there are varying degrees of success in engaging young people. This may be connected with a lack of volunteer opportunities affording the prospects that young people seek; or it may be that young people are not accessing some of the volunteering opportunities on offer. In common with other research, this study has found that 'word of mouth' and 'local networks' are the recruitment methods of choice for most organisations. If young people are not linked in to local networks where they would hear of opportunities, it is unlikely that they will find out enough to become involved.

The policy review highlighted the support of the Scottish Government for skills development, and specifically, recognition that volunteering was a means by which young people could gain skills that would stay with them for life. The case studies, in particular, highlighted that those wishing to work in the historic environment sector needed skills and experience, and that volunteering can help individuals to gain this experience. The volunteer-involving organisations in the sector, therefore, are well placed to help to 'skill-up' the future workforce, enabling not only the acquisition of skills by individuals, and increasing opportunities for sharing skills, but also helping fill some of the present gap in availability of traditional craft and building skills.

The Project Scotland scheme was mentioned as a very effective means of involving young people in the sector and affording them the opportunity to develop skills and gain experience for future employment. This scheme gave young people the opportunity to take up full-time volunteering with financial support for their living costs.

Volunteer management structures

The majority of volunteer management in the historic environment sector is through unpaid peer support, and many organisations have no provision at all. It may be useful to have a better understanding of how this support is perceived by the volunteers 'on the ground'.

Research carried out by the Urban Institute in 2003 suggests that investment in volunteers and volunteer management, can yield significant benefits to organisations large and small (Hager and Brudney, 2003). Consideration should be given to how more organisations could be encouraged to make provision for volunteer management and support; and how organisations which already make some provision could further invest in their volunteers and what impact this would have on the volunteer experience.

The role of the local authorities and Government

The majority of respondents depended on their local authority for information and advice on volunteering issues. What remains unclear is what information and support is being provided, and whether it meets the needs of organisations. The research indicates that a good number of Scottish local authorities involve volunteers in their own work in the historic environment; this may have a positive impact on them being viewed as a source of support locally.

There appears to be concern from case study and consultation respondents about Historic Scotland's attitude to volunteers and volunteering. This theme was prevalent at all stages of the research (consultation, questionnaires and case studies), which indicates that this perception may be widespread. It is felt by some respondents that

Historic Scotland could do more and should lead by example with regard to volunteer involvement.

A number of research respondents also mentioned positively the support given by the National Trust for Scotland to volunteering, and to voluntary organisations in the sector. It is likely that support for volunteering in the historic environment needs to come from various avenues, and that these should be sufficiently diverse that organisations could choose which support mechanism is most relevant to them and their activities.

Comparison with the natural heritage

As mentioned in the literature review, at the outset it was suggested that the scale of volunteering in the historic environment might be similar to that in the natural heritage sector. It is therefore interesting to make comparisons between the data collected here, and the findings of a similar audit and review of volunteering carried out on the natural heritage sector. It is possible to make direct comparisons as the methodology used was similar.

The database of organisations developed for the SNH research contained 553 organisations, in comparison to 897 for the HEACS research. However, the SNH questionnaire was also distributed to around 500 organisations through BTCV.

In the volunteer-involving respondent organisations, a total of 23,340 volunteers were reported in the SNH study, while the figure reported for the HEACS study is 13,204. Drawing on both pieces of research, it appears that there are more volunteers in the *participating* organisations in the natural heritage than in the *participating* organisations in the historic environment. However, it is interesting to note that historic environment organisations report a higher level of involvement of 16-25 year olds (23%, compared with 18% in the natural environment).

Although there is a clear difference in volunteer numbers identified by the two studies, with larger numbers of volunteers identified in the natural environment, there appears to be a reverse trend in the reported time given by volunteers. More volunteer hours are given to the historic environment in the average month than to the natural heritage (167,721 compared with 91,149 in the natural heritage). A further calculation finds that the average number of hours given per volunteer in the average month is 13 in the historic environment, compared to 4 in the natural heritage. Therefore, although this indicates that there are fewer individual volunteers in the historic environment, those volunteers on average appear to give more time than those in the natural heritage.

As a result, the economic value of volunteering in the historic environment is double that reported in the SNH research (£28,223,653 compared with £14,246,706)⁶.

Further examination of the two sets of data indicates that there is less paid provision for volunteer support in the historic environment than in the natural heritage; 79% of organisations in this study have no paid provision for volunteer management, compared with 44% in the SNH study. This may be a factor in the high number of hours given by volunteers in the historic environment; projects are not only fully run and managed by volunteers, but volunteer support is also carried out by the same volunteers who carry out the main activities of the organisations.

⁶ Updating the SNH economic value calculation with the latest average income figures raises the latter figure to around £15 million.

Conclusions and Recommendations

From the 233 organisations which participated in the research (26% response rate), we have found that 12,449 volunteers carry out a total of 167,721 hours per month, which equates to an economic value of £28,223,653 per annum.

We recommend that:

- This baseline set of organisations is invited to participate in a longitudinal study to monitor trends in the scale, nature and value of volunteering within the sector over time.
- The significant contribution of volunteers is taken into account by Government and others when considering the overall contribution of the historic environment sector to the Scottish economy and National Outcomes.
- Organisations are encouraged to collect and maintain robust volunteering data in order to inform volunteer development activities and provide evidence of the impact of volunteering. A simple method of volunteer sampling could be employed to establish estimated volunteer contributions.

Volunteers play a key role in the historic environment, giving a large number of hours in carrying out skilled and semi-skilled tasks. This evidence, together with examples of resistance to skilled volunteering roles within some parts of the sector, suggests a lack of shared understanding of what roles and tasks are appropriate for volunteers.

We recommend that:

- The skills of volunteers and the quality of their work in the historic environment are better identified and understood.
- Research be undertaken to improve understanding of the scope and quality of volunteers' work in the historic environment, in order to help target training and build a shared understanding of volunteers' contribution to the sector.

Evidence suggests that good volunteer management practices (as defined by quality standards such as Investing in Volunteers) are not being implemented consistently across the sector.

We recommend that:

- The volunteering infrastructure, including Volunteer Development Scotland and the Volunteer Centre Network, engage with the historic environment sector to assist in improving the application of good volunteer management practices.
- Volunteer involving organisations are supported by historic environment bodies, local authorities, and the voluntary sector to consider their policies and practices around volunteering and volunteers.
- Individuals tasked with supporting volunteers are given appropriate training and support.
- Organisations consider the Investing in Volunteers quality standard as a benchmark of good volunteer management practice, whether or not they formally undertake to achieve the Investing in Volunteers (iV) Award.
- Organisations providing funding to the sector consider the usefulness of quality volunteer management practices, and encourage grant applicants to consider their practice in relation to quality standards such as iV.

Concern had been expressed by key individuals in the sector that young people did not seem to be much involved in volunteering in the historic environment. However, this survey has shown that a relatively high number of young adults are involved, compared both with sector expectations and the numbers volunteering in the natural environment, but they appear only to be involved in particular types of organisation.

We recommend that:

- Organisations across the sector consider how to involve more young people in their work, and identify what activities might appeal to young people considering volunteering in the historic environment.
- Organisations consider developing innovative methods of recruiting and roles that will help engage people (of all ages) who might not typically become involved in the historic environment.
- Organisations consider consulting their local Volunteer Centre for support in attracting young volunteers through existing youth-focused programmes.
- Further research is undertaken to examine enablers and barriers to young people's involvement in the historic environment sector.

Historic Scotland, while being a major funder of organisations which involve volunteers, is seen by some respondents as somewhat negative about volunteering in the historic environment. It was felt that Historic Scotland could take more of a lead.

We recommend that:

- HEACS meets with Historic Scotland to discuss the findings of this research and begin discussions on how volunteering can be better supported in the sector.
- Historic Scotland considers the wider policy context within which the Scottish Government supports volunteering and, against this background, considers how best it can help the historic environment sector to realise the full potential of volunteering.

The research findings have some interesting similarities and differences to those found in a similar audit and review of the natural heritage carried out on behalf of Scottish Natural Heritage in 2006. For example, there are higher numbers of volunteers reported in the natural environment, yet the historic environment volunteers generate a higher number of volunteer hours.

We recommend that:

- Historic Scotland, HEACS and other key historic environment bodies engage with their counterparts in the natural heritage sector in order to understand how they might better support volunteer development, share resources and improve practice across both sectors.

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Appendix 1 Research Questionnaire

VOLUNTEERING IN THE HISTORIC ENVIRONMENT IN SCOTLAND

QUESTIONNAIRE

The information gathered through this questionnaire is CONFIDENTIAL and will be used to establish a baseline for the number of organisations and number of volunteers involved in the historic environment sector in Scotland. The information will also be used to establish a picture of the scale, structure, opportunities and requirements of volunteering in the historic environment.

The Historic Environment Advisory Council for Scotland (HEACS) aims to: "increase awareness and understanding of the scale and range of volunteering in the historic environment sector in Scotland, leading to enhanced recognition and support for the work of volunteers."

This study includes a wide range of activities such as practical conservation work; research and recording; involvement on a committee/board/steering group; administration and office work; fundraising for an organisation or group; or any other roles that fulfil the purpose of the organisation or group.

Returning Completed Questionnaires

All completed questionnaires returned to VDS by Friday 5th September 2008 will be entered in a PRIZE DRAW and the lucky winner will receive a HAMPER OF FAIR TRADE EDIBLE GOODIES. Please use the stamped addressed envelope provided to return the questionnaire.

- Q1. Name of Organisation or Group
- Q2. What is the main purpose of your organisation or group?
- Q3. What activities does your organisation or group undertake in Scotland to fulfil this purpose?

Practical site management (if so please specify one or multiple sites)

One site

Multiple sites

Research and recording

Education/training

Campaigning

Providing advice/support to others

Other, please specify

- Q4. What is the annual income of your organisation or group in Scotland?

£0/Not applicable

Up to £1,000

Up to £10,000

Up to £25,000

Up to £50,000

Up to £100,000

Up to £250,000

Up to £500,000

Up to 1,000,000

Over £1,000,000

Other, please specify

- Q5. In which sector does your organisation or group work?

Voluntary/community

Public

Private

- Q6. Is your organisation or group a company limited by guarantee , or incorporated?

A company limited by guarantee
Unincorporated
Trust

Q7. Does your organisation or group currently involve volunteers in Scotland?

Yes (please go to Q9)

No (please go to Q8)

Q8. Does your organisation or group plan to involve volunteers in Scotland in the near future?

Yes

No (please continue to Q25)

Q9. Why does your organisation or group involve volunteers?

Q10. Which of the following activities are undertaken in the past year, or six months by volunteers for your organisation or group in Scotland?

Practical work:

- Conservation and repair
- Construction
- Maintenance (inc. minor repairs)
- Archaeology
- Architectural services

Research and recording:

- Site surveying
- Managing data
- Archival research

Education/training/awareness:

- Working with schools
- Communities/family activities
- Training others
- Leading walks
- Preparing publications and interpreting information
- Acting as site or tour guides

Organisational support:

- Management committee/steering group
- Administration/office activities
- Co-ordinating other volunteers
- Fundraising
- Campaigning
- Driving
- Marketing

Other activities:

- Q11. At present how many volunteers are actively involved in the activities of your organisation or group in Scotland in the past year, or six months?
- Q12. How many volunteers does your organisation or group have in total in Scotland? (active plus non-active)
- Q13. Please estimate the total number of hours volunteers give to your organisation or group in Scotland in an average month.
- Q14. How does your organisation or group recruit new volunteers in Scotland?
- Word of mouth
 - Local networks
 - Volunteer Centre
 - SCVO (Scottish Council for Voluntary Organisations) or Council for Voluntary Service
 - Website
 - Advertising on community/site based notice boards
 - Community newsletter
 - Local media, newspaper/radio
 - Other, please specify
- Q15. Who makes up the majority of the volunteers in your organisation or group in Scotland at present? (Please tick one box only)
- Local residents/site users
 - People seeking career development opportunities

Individuals with special interests/skills
Other, please specify

Q16 Which other kind of volunteers does your organisation or group work with in Scotland?

Local residents/site users
People seeking career development opportunities
Individuals with special interests/skills
Other, please specify

Q17 Does your organisation or group collect information on volunteers in Scotland?

Yes (go to Q18)
No (go to Q19)

Q18 Which of the following information on volunteers in Scotland does your organisation or group collect?

Gender
Age
Employment status
Ethnicity
Disability
Hours given by volunteers
Other, please specify

Q19. Does your organisation or group calculate a financial equivalent of the volunteers work/contribution to your group/organisation?

Yes
No

Q20. Please estimate the number of volunteers in each age bracket involved in your organisation or group in Scotland?

Under 16

16-25

26-59

60+

Q21. Who supports volunteers in your organisation or group in Scotland?

A paid post dedicated to volunteering, e.g. volunteers manager/coordinator
Paid staff to support volunteers as part of their role
An unpaid volunteer leader who supports other volunteers
No provision is made
Other, please specify

Q22. Here is a list of possible policies and practices for volunteer-involving organisations. Please indicate below whether or not your organisation or group has these in place in Scotland, or is working towards having these in place?

In place Working towards

Constitution
Volunteering Policy
Health & Safety Policy
Risk Assessment
Insurance to cover for volunteers
Payment of volunteer expenses
Induction for volunteers
Training for volunteers
Training in volunteer management for staff/volunteers
Recognition events/awards for volunteers
Consultation with volunteers
Job description for volunteers
Other, please specify

Q23. If your organisation or group has recognition events/awards in place for volunteers, please give details e.g. the nature of the awards, any age targeting etc.

Q24. Does your organisation or group have a process to monitor and review its ways of working with volunteers? e.g. policies and procedures, annual audit.

Yes
No

Q25. Where does your organisation or group go for information and advice on volunteering issues?

Historic Scotland
Historic Environment Advisory Council for Scotland
Volunteer Development Scotland
Volunteer Centres
Scottish Council for Voluntary Organisations
Council for Voluntary Service
Local Government, please specify
Government General, please specify
Other, please specify

Q26. Please list any historic environment networks and/or volunteering networks with which your organisation or group has contact.

Historic Environment Volunteering

.....
.....
.....

Thank you very much for taking the time to complete this questionnaire.
Please return it in the FREEPOST envelope provided to: Volunteer Development
Scotland, Stirling Enterprise Park, Stirling, FK7 7RP by Friday 5th September.



Appendix 2 Telephone Interview Schedule

We would like to record the interview with permission. The data will be used to inform our understanding of volunteering in the historic environment as part of the wider study on behalf of HEACS. Data from these case studies will be anonymised in the final report and a copy of the transcript can be made available to you for checking before use in the report.

The Organisation

Some details to give context to the interview data

Structure of Volunteering

Think about how people volunteer for your organisation

Structure of Volunteer Management

Think about how your volunteers are managed and supported:

Volunteer Policies and Practices

Think about the policies and practices relating to volunteers you have in place or are working towards having in place

Training Needs

Think about any training that your organisation provides for volunteers or volunteer managers

Support Needs

Is there any way in which you feel that other organisations could support you to further develop your involvement of volunteers? E.g. historic environment or volunteering focused organisations?

External Policy

Are there any external influences e.g. policies or regulations that impact on your work?

Opportunities for Joint Working

Do you currently work jointly on volunteering with any other organisations?

Do you see any opportunities for joint working with organisations both in and outwith the historic environment?

Challenges

Below is a list of possible challenges for volunteer-involving organisations. Please indicate whether each of these applies to your organisation. We will ask you your answers during the telephone call.

	Applies a lot	Applies a little	Doesn't apply
Recruiting sufficient numbers of volunteers available during the day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruiting sufficient numbers of volunteers available in the evenings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruiting volunteers with the right skills or expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having more volunteers than the organisation can accommodate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turnover of volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reliability of volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding to support volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capacity to train and support volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regulatory, legal or liability constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resistance to volunteering on the part of paid staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resistance to volunteering on the part of Board members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any other challenges?

Anything else?

Appendix 3 Economic Value of Volunteering

Total volunteer hours volunteered in the average month	= 167,721
167,721 x 12	= 2,012,652 hrs per annum
2,012,652 ÷ 35	= 57,504 FTE ⁷ Weeks
57,504 ÷ 48	= 1198 FTE jobs p. a.
Average ⁸ Scottish weekly wage exc. Overtime	= £409.01
57,504 X £409.01	= £23,519,711 p.a.
+ 20% ⁹	= £ 28,223,653 p.a.
Total economic value of volunteering in the sample of organisations	= £28,223,653 p.a.

⁷ Full time equivalent.

⁸ The average Scottish weekly wage is used rather than the minimum wage to recognise the skilled contributions of volunteers.

⁹ The Institute for Volunteering Research advises adding 20% to represent the cost of 'employment overheads'. This is because, in addition to paying the actual wage, an employer also covers employee costs such as national insurance, holiday pay and other benefits.

Appendix 4 Summary of Investing in Volunteers Indicators

The Investing in Volunteers Standard comprises of 10 Indicators. These have been developed to cover all the aspects of volunteer management.

- Indicator 1. There is an expressed commitment to the involvement of volunteers, and recognition throughout the organisation that volunteering is a two-way process, which benefits volunteers and the organisation.
- Indicator 2. The organisation commits appropriate resources to working with volunteers, such as money, management, staff time and materials.
- Indicator 3. The organisation is open to involving volunteers who reflect the diversity of the local community, in accordance with the organisation's stated aims, and operates procedures to facilitate this.
- Indicator 4. The organisation develops appropriate roles for volunteers in line with its aims and objectives, and which are of value to the volunteers and create an environment where they can develop.
- Indicator 5. The organisation is committed to ensuring that, as far as possible, volunteers are protected from physical, financial and emotional harm arising from volunteering.
- Indicator 6. The organisation is committed to using fair, efficient and consistent recruitment procedures for all potential volunteers.
- Indicator 7. The organisation takes a considered approach to taking up references and official checks which is consistent and equitable for all volunteers, bearing in mind the nature of the work.
- Indicator 8. Clear procedures are put into action for introducing new volunteers to the organisation, its work, policies, practices and relevant personnel.
- Indicator 9. Everybody in the organisation is aware of the need to give volunteers recognition.
- Indicator 10. The organisation takes account of the varying support needs of volunteers.