AASLH
TECHNICAL LEAFLET BUNDLE
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Not Just Warm Bodies

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How would you like some help? Could you use one or two extra hands? How about someone who really knows how to make progress with your latest challenge? “Regular” employees are one option, but the organization may not be able to afford them or be willing to make a long-term commitment. Volunteers, interns, and consultants are other options that may fill your need. This bundle of leaflets can help you find and build a mutually beneficial relationship with these valuable resources.

TL 065 – Volunteer Docent Programs: Programmatic Approach to Museum Interpretation (1973)
TL 082 – Using Consultants Effectively (1975)
TL 170 – Establishing a Volunteer Program: A Case Study (1990)
TL 184 – Student Projects and Internships in a Museum Setting (1993)
TL 192 – Effective Internship Programs (1996)

technical leaflet

VOLUNTEER DOCENT PROGRAMS:

a pragmatic approach to museum interpretation

By Mary Claire Bradshaw

The way a museum organizes its volunteer program can make the difference between good interpretation and disaster. Properly planned and directed, a volunteer program provides an invaluable service to the museum, the community, and the volunteers themselves.

The museum must understand, however, that a volunteer force does not assume responsibility for any phase of the program independently. Volunteers, to work successfully, need guidance and training. Groups of volunteers become an extension of the total interpretive program, not a substitute for staff responsibilities. They do not replace staff effort—they expand it.

Such programs need not be limited to large museums. In fact, the smaller the museum the more valid the program, for carefully trained and supervised volunteers can enable the museum to carry out projects it could not otherwise undertake. In larger museums, with a number of staff members, it is particularly important to have a clear understanding that volunteers are there to assist—and not to replace—paid workers.

No matter what size the museum—or how it is organized—there are certain essentials to a good volunteer program. These include wise advance planning, adequate training with continued instruction through group excursions and study, and expressions of appreciation.

PLANNING THE PROGRAM

The first step in planning a volunteer program is to clearly define what tasks volunteer interpreters, or docents, as they have come to be called, will perform: give tours, guide school groups, greet the general public, help provide security for the collection, sell admissions, conduct special interest programs, or other responsibilities directly related to the museum's interpretive functioning. Deciding the tasks for docents may well result in re-evaluation of the museum's over-all program and goals. Once the decisions are reached, the role of the volunteer should be written into a job description which can be given to prospective docents.

A museum of the life and history of Fredericksburg, Virginia, came to life with the help of Historic Fredericksburg volunteers. Since completion of the exhibits, the docent group offers daily tours to visitors.

FINDING VOLUNTEERS

In seeking volunteers the museum may approach other community organizations such as the Junior League, the American Association of University Women, and the Daughters of the American Revolution. Working through established groups has the advantage that the groups generally feel responsible for the performance of their members when they are working in the name of the group. They tend to be reliable, for they are interested in their group's reputation.

There is a good deal to say, however, for a group of volunteers organized completely in the name of the museum and for no other purpose. Loyalty to the museum is maximized, and the museum retains authority for making decisions on operation and interpretation. Occasionally an interested volunteer will help to build a group from among her contacts who, in turn, will have contacts of their own. It is essential, however, that the *museum* maintain control over admission of volunteers to the group.

Prospective docents should be interviewed by the staff member of the museum responsibile for volunteers. The interview can be followed by an invitation to visit a meeting of the docents,

and, if still interested, the individual should participate in the next regular training session, take any tests which have been established as part of the training, and be assigned to duty.

During the training period, the staff member has an opportunity to observe the ability of the prospective docent to do what is asked and to work well with the group. An unsuitable individual can be tactfully counseled, or channeled into more appropriate work by the museum staff. Even then, ideally, a volunteer's initial work should be on a "provisional" basis for a short interval.

STANDARDS

No matter how desperate the need for volunteers, it is imperative from the beginning to have standards from which the museum never wavers. The standards should be written down and available to everyone: docents, prospective docents, the museum staff, and even board members.

Standards make a group effective. The fact that an individual is a volunteer is no justification for inferior performance. No group or individual should join a museum docent program without this clear ground rule: he who does not measure up will be asked to change responsibilities or resign.

Some standards are universal: willingness to take criticism, desire to learn, reasonable appearance, satisfactory speaking voice, punctuality, and dependability. Other requirements will be more specifically related to the docents' functions in the museum.

Just as the museum sets standards for the volunteers, so the volunteers will have expectations from the museum. These include scheduling efficiency, ade-

Training sessions such as the one below, which brought together docents from all parts of Virginia, as well as social contacts and informal interaction, are some of the benefits that stimulate volunteer service.

quate resource materials, communication, and advance notice of training programs.

One common pitfall of museum staff in working with a volunteer group is failure to keep the group informed. Many a docent has been surprised on her monthly day of guiding in the museum to discover a new exhibit she knew nothing about, or a special event which catches her unaware. Although this situation is inexcusable, the problem is universal. Its solution seems to be a combination of things, ranging from use of bulletin boards to being certain all docents are on any mailing lists the museum uses for newsletters or press releases. If the volunteer group has a regularly scheduled meeting, a staff member can also "brief" the group as a whole on upcoming events and plans.

A docent has a right to expect a valid

Volunteers from the D.A.R. have provided tours for the public at the John Marshall House as an on-going program for a number of years. The docent group acts as a committee of the Chapter with special identification as the John Marshall Docents.

return for her time. There are two legitimate remunerations a volunteer may receive beyond social contact with her peers and museum or gift shop discounts: intellectual and cultural stimulation and the knowledge that she is making a genuine contribution. To accomplish the first, the museum provides ongoing training which may include excursions to other museums. To accomplish the latter, the museum makes sure that volunteers do not do "busy work"—that what they are asked to do is worthwhile.

TRAINING

It is impossible to overestimate the need for proper, adequate, and thorough training for volunteer interpreters. Too often they are given a pat on the back and shown a large group to guide having received no details of their assignment or background information on the museum.

Formally structured training programs are a necessity. They should include lectures, discussions, seminars, tests, and field trips. It is also imperative for training to include *demonstrations* of the type of interpretation the volunteer is being asked to provide. Volunteers should be shown exactly what route they should follow and should be given sample tours, room descriptions, book reviews, library materials, and any other information that will help put across the museum's message to the specific groups they meet. Such a program will put an end to the myth-making and repetition of gossip to which the untrained volunteer often turns in desperation.

The museum cannot expect the docent to present its collection, message, or historical significance unless additional *written* material is provided from which to select appropriate interpretation. The importance of written material cannot be overestimated for it allows constant

IDAHO HISTORICAL SOCIETY

The Idaho Historical Society in Boise was the scene of this marionette show produced by volunteer workers to an audience of fourth-graders. At right, youthful visitors to Lorton, Virginia's Gunston Hall are guided in the intricate art of quill pen writing by a volunteer who has received special training in working with children.

review and confirmation of details.

One way of accumulating this background data is the development of a continuing series of study papers—no longer than a few pages—discussing subjects important to the museum's interpretive program: history, decorative arts, biography, and so forth. These papers should never overwhelm the potential reader and should be written in an interesting enough manner that volunteers will look forward to their arrival.

In addition, a docent group needs written information on the collection: furnishings lists and room descriptions in the case of a historic house; knowledge about artifacts and specific exhibits in a museum.

A bibliography for study can be provided as well, and the museum should tell docents where they may obtain the books and articles on the list. Nor should the list be too long. Suggest basic readings to be followed by additional titles later.

An ongoing series of lectures should also be part of the docent's training. In fact, experienced docents may develop a knowledge in a specific area that they can share with the other volunteers. The lectures could be taped, typed, and duplicated for inclusion in the study paper series. The material would thus be available to anyone who missed the lecture and to newcomers to the group.

In short, docents need a steady flow of provocative information relative to the subjects with which they deal in their interpretive role and relating to the art of interpretation itself. This stimulation must be constant, informative, entertaining, relevant, and it must be geared to their needs, not over their heads.

Be sure the docents are given practical information as well, such as a statement of their job description, and whatever rules and regulations for operations have been agreed upon. They need names and addresses of all other volunteers and the museum staff.

All aspects of the training session should be planned and publicized well in advance, including dates, times, and topics to be discussed. Ideally, a program for the academic year should be announced in the fall.

Docents' training might also include field trips to other museums and historic sites. The trips should be planned in advance, include study papers on the sites or collections to be visited, and perhaps lectures enroute. Museums are generally most cooperative about entertaining other docent groups. Docents are usually willing to finance such trips —which can be surprisingly inexpensive —and eager to assume responsibilities such as chartering the bus.

Small museums might consider sharing the responsibility for training volunteers through joint programs, lectures, and field trips.

ORGANIZING DOCENT GROUPS

Docents' associations may assume management of the volunteer program. They may take charge of notifying members of meetings, scheduling specific individuals for duty, and providing their own discipline for breakdowns in reliability. It is wise to allow the Docents Association a good deal of self-identity. The group may wish to elect officers or plan get-togethers on its own.

It is important, however, that a "social

set" image is not created. This will kill any worthwhile volunteer program. To help avoid this and to facilitate communication, one member of the museum staff should work closely with the docents. He should be an ex officio member of all committees and attend all meetings of the group.

The museum should also avoid confusion as docents arrive for duty. It is a good idea to set aside a small area or room with a coffee pot, coat rack, purse drawers, name tags, and a bulletin board for messages.

Docent groups should never get too large. If there is an excess of docents, they may not get the opportunity to use their training in actual interpretation. Interest will quickly wane, and they will drop out of the group. A docent should never expect to work less than once a month. Once a week seems to be a more reasonable commitment.

Alternative volunteer service should be made known to the docent organization. Those unable to serve in an interpretive capacity may be willing to help with mailings, press releases, telephoning, or office tasks. Many museums have even integrated volunteers into the research or cataloguing program. Docents who are temporarily unavailable for scheduled duty may also be willing to assume some other responsibility that could be completed at odd moments. Remember that the interests and abilities of volunteers are as varied as those of the paid staff.

In scheduling volunteers, either the museum staff or the docent organization should plan for possible emergencies, such as sickness, preventing a docent from showing up. One system is to book an "alternate," so that docents on duty automatically have someone to call at the last minute. Alternate docents can be asked to be available until an appointed hour.

Finally, the museum staff should acknowledge the enormity of the volunteers' commitment—the energy, time, loyalty, and often money they give to the museum. An occasional "thank you" is not only a big morale booster; it is also recognition that the docents' job is significant to the museum's program. Volunteers relieve an over-burdened budget. Even more important, they enable the museum staff to invest its time and resources more effectively.

During her professional career the author has developed a deep interest in the problems of properly interpreting historic sites. She has worked for a variety of historical organizations, including the National Trust for Historic Preservation, the Virginia Historic Landmarks Commission, the Association for the Preservation of Virginia Antiquities, and Gunston Hall Plantation in Lorton, Virginia, since her graduation from Rice University in Houston, Texas. Mrs. Bradshaw's present free-lance work speaking at AASLH seminar programs and consulting with museums and preservation groups has given her additional opportunity to observe volunteer programs in many different settings. With one exception, the photographs throughout the leaflet were taken by the author.

TECHNICAL LEAFLET 65

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technical leaflet

USING CONSULTANTS EFFECTIVELY

By William T. Alderson
American Association for
State and Local History

Consultants serve many functions. They provide expert and professional advice. They also provide a degree of objectivity. By viewing your problem from a wider perspective, they can come up with solutions you had not thought of. A consultant might be called when you have a technical problem to solve; or you might seek a consultant when you know the answer but cannot get others to go along with it. A well-thought-out report can provide the support you need to get on with a project.

Before calling in a consultant, be sure that you really need one. If your problem is a technical one, you may find the answer in one of the many fine publications available. Your state society also may be able to furnish you with this information or steer you in the right direction. Local architects, engineers, and other professionals are a good source for specific technical information. Solving your problem this way will save both time and money.

There will be times, however, when involving local personalities in the solving of problems will cause hurt feelings. People with the best of intentions may have made mistakes that have to be corrected. This is a tough problem; and few of us have the courage to lead the move within an organization to correct these mistakes, knowing that it will involve hurting the feelings of people who really did try hard. Calling in a consultant can solve these awkward situations. The smaller the community, the more difficult some of these situations become and the more useful this "authority from the outside" can be. Although you should never hire a consultant simply to arbitrate interoffice feuds or support preformulated ideas, he does bring detachment and authority to your project. He can provide just the boost you need.

DEFINE YOUR NEEDS

Your first responsibility when bringing in a consultant is to decide exactly

what your problems are. Ask your committee or board how they define your needs. Study this analysis, perhaps returning it to them for further clarification. Once the direction is clear, set down *on paper* a specific description of what you have identified as your major stumbling block. Do you need advice on architectural restoration of a historic structure or advice on the proper furnishings for that structure? Is your problem more general—an evaluation of what your society's goals should be?

The nature of the problem will determine what kind of consultant you are looking for. If it is an architectural problem, you will want someone trained in historic architecture; but if it is a question of furnishings, you will want someone with training in that field. On the other hand, a successful historical society director who has had broad experience in the field may be best if projecting the society's goals is your greatest need.

To get the right person to do the job, you must know just what the job is. When defining a number of objectives, remember that one person may not have answers to all the various questions raised. Most of our problems are too specialized for any one person to handle more than one or two of them at a time.

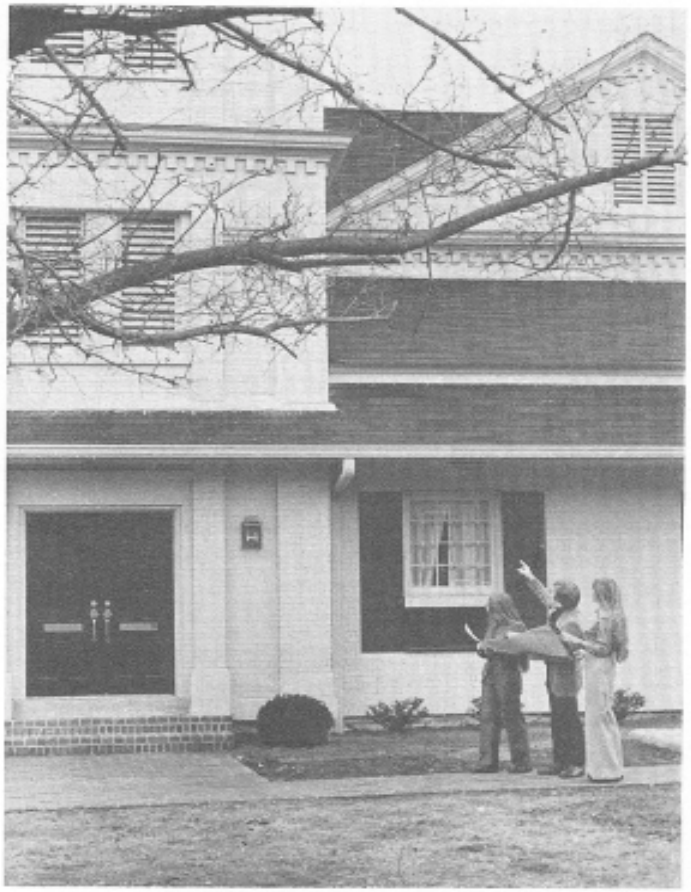
CHOOSING A CONSULTANT

Knowing what advice you are seeking is your best guide in choosing an appropriate consultant. Frequently help is available right in your own locality—someone who has the expertise you desire and knows your area, as well. If a person from your area can do the job—and you are not trying to seek the weight of "an authority from outside"—use the local person. If your problem is a restoration, for example, check first with local architects. Local colleges and universities, too, can provide valuable expertise. You will not have travel expenses to pay, and the local person may even contribute his services to your cause. The problem with using a local consultant, however, is that while his advice may be just as good as the person's from 300 miles away, people will pay more attention to the expert from far off. And, of course, some problems may require expertise that is not available locally.

Assuming that no one in your area can do the job, you are faced with the question, "How do we find the right person?" Choosing a consultant is similar to hiring an employee, so you should give your decision the same care that you would give to hiring a new director for your society. Check

You may be able to consult with local architects on restoration or construction projects.

You may want to have the consultant make a preliminary visit to discuss the help you need, and to give him a chance to see what progress has been made.



qualifications, references, and past consultations. Never take a consultant on face value—many people pass themselves off as consultants, claiming to have expertise that they do not, in fact, possess. Others are riding on past reputations and have not kept up with changes in their profession.

Use the telephone. You will get more reliable references this way. Contact other societies the person has consulted for on similar problems. Ask them whether they felt his work was satisfactory. Was it finished on time? Did the finished report really help with the problem?

Some organizations have prepared lists of "approved" consultants and their areas of expertise, which they will gladly give you. Check with professional organizations. For instance, if your problem is an architectural one, seek recommendations from the American Institute of Architects. Other national organizations offer consultant services, often at minimal cost. Your state historical society may also have field representatives who consult with local groups. While you are considering possible consultants, choose two appropriate candidates. If one is unavailable, you can contact the other immediately.

PREPARING A WRITTEN AGREEMENT

Once you have found a consultant, it is important to enter into a written agreement on just what is to be done. You may wish to discuss this first by telephone. You may even want to schedule a preliminary visit by the proposed consultant (at your expense) to discuss the kind of help you need. Do you expect him to advise you on how to begin the restoration of a given build-

ing? Do you expect him to consult with you on the age of the building and possible dates when architectural changes were made so that you can restore the building as it was at a given point in time? Do you expect consultation on the decorative arts? On managing the building? On setting up your organization? Or on running the site most effectively after restoration? Does he feel your needs can be adequately solved in the allotted time period?

The final agreement may be simply a letter summarizing your mutual decisions about the consultation. Include a paragraph on the kind of report you expect. Some people will work with you only if you accept an oral report. (Either they are too busy to write one or they just don't like to write.) If you agree on a written report, what do you want included? Tell him also how long you expect the consultation to be (usually one or two days) and the fee you can offer. If the consultant will have considerable out-of-pocket expenses for travel or other costs, it is considerate to advance some expense money. Confirm dates and local arrangements if possible. This is a good time to include information on your project so that he can do some preparation ahead of time.

What kind of deadline do you have on the project? Dates for both the consultation and the report are involved here. Remember that many good consultants are scheduled months in advance. So get the deadline in writing beforehand. Sometimes there is no important deadline, and you can accept the consultant's report two weeks later, a month later, or even six weeks later when he has analyzed all the data. In some cases, it may be crucial that you have the report by a given date—you might, for instance, need it for a grant request.

FEES AND EXPENSES

How much should you offer a consultant? There is no magic formula. The fee paid to most people in historical preservation work ranges from $100 to $200 a day ($150 a day is most common), depending upon who the expert is, the demand for his services, and whether he needs the money in the first place. If he is really sold on your project, he will sometimes do it for less. If he cares very little about your project and is interested only in the money, he will charge more.

State a figure in your initial offer—and make the offer by telephone. That way if he seems to gasp all of a sudden, you can say, "We mean only per day, and you will be here two days so that means twice as much." Or if he seems stunned by the prospect of getting so much money, you can try to get him to pay his own expenses.

Negotiating by telephone generally is more satisfactory than negotiating by mail because you are in a position to answer the prospective consultant's questions about both the nature of the job and the fee. When negotiating by mail, you frequently have problems with communication—you may be turned down by a person with whom you could have reached an agreement by phone. After reaching a verbal agreement, be sure to get a written confirmation. This will prevent later misunderstanding.

State the consultant fee in specific terms. Some consultants charge a fee of $100 for each day they work on the project. That might be one day at your site and two days writing the report. It can be quite a shock for an organization that has hired a consultant for $100 a day, thinking they will be charged only for the one day he spent at the site, to receive a bill for $300, including two extra days spent in writing the report. Other consultants expect only $100 a day for the time actually spent at the site, figuring that this fee will also cover the costs of preparing the report later on their own time. Some charge their daily fee from

Anticipate the consultant's need for tools and working space, and have them prepared for him.

the time they leave their homes until their return, others charge for time spent in travel at half the regular rate. Be sure that you make a special arrangement in advance. This will save embarrassment and even argument later on.

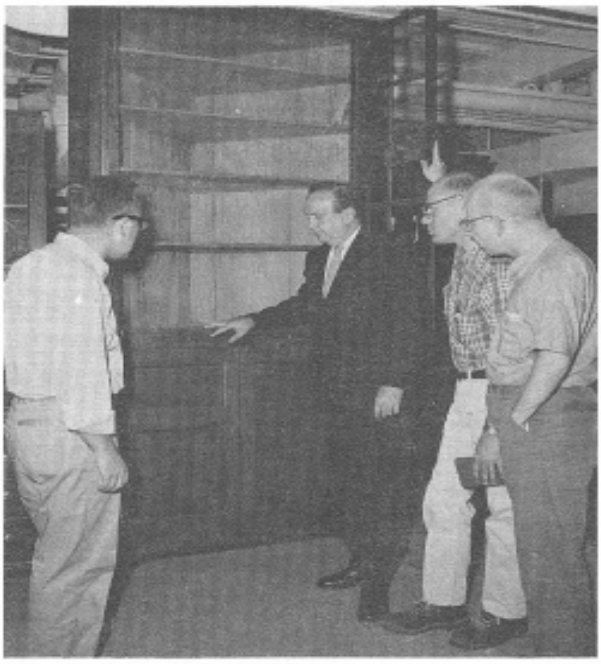
Customarily you pay the expenses of the consultant unless he lives so close to your site that he can drive over, spend the day working with you, and drive home that night. If he must be gone overnight, you should pay for his lodging and meals. Generally, consultants will not abuse this expense—they will try to live in modest comfort. But if you are nervous about that very expensive motel down the road and there are others that are more moderate, you might agree to make arrangements in advance at, say, the local Sheraton or Holiday Inn. This should put your worries to rest.

Occasionally, you will run into a consultant who will accept your accommodations and then send a bill including items you do not feel you should be responsible for—telephone calls, dry cleaning, or even liquor. Here, you will just have to use your best instincts, basing your decision on how good a report he turns in and what kind of person he is. If a little liquor made him feel better, it's worth it. Perhaps he got his suit dirty while crawling around underneath your house—the dry cleaning bill is not an unreasonable expense for him to pass on. The telephone call may have been to a friend he thought might have an answer to a question that puzzled him. You cannot set a hard and fast rule on this situation—just be aware that sometimes it occurs.

PREPARING THE CONSULTANT

Before the consultant arrives, send him background information about your organization, its membership, board of trustees, and whatever seems appropriate about your community. Consultants are often brought in because there is some dissension within the local group. There may be one faction that is running the organization and needs help, while another faction within the organization is lying in wait to trap the consultant when he arrives. If the consultant is going to run into this problem, for goodness sake let him know in advance that there is difference of opinion on the premises. You don't have to go into details—just let him know enough so that he doesn't arrive totally unaware and get clobbered from both sides.

Presumably a preselected group within your society will be planning for the consultation—determining what you need to know and what the consultant must understand before he comes. Keep this committee small and be sure that they clearly understand your goals ahead of time. They, too, should prepare carefully before the consultant arrives. He may suggest some reading



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Only a small group should accompany the consultant.

for them to do beforehand. Facts about the project may need to be collected and discussed. The consultant is dependent on the information provided him if he is to come up with valid suggestions.

What information you send the consultant will depend upon how you define your problem. If you want an evaluation of how to restore your building, make sure you send him data on previous studies, give him an idea of your financial potential, and include any overall description of your society that might enter into his decision. Remember, the better prepared he is when he comes, the better his ability to evaluate quickly. The time you spend now will pay off later.

Prepare a careful itinerary for the period of consultation. Be sure that you have a clear set of questions to ask and that each important aspect of the problem has been included. Consultants weary of constant questions months after their report has been submitted, especially when they could have been avoided by careful preparation before the actual consultation.

What else do you expect the consultant to do? Do you expect him to attend a board meeting? If so, tell him in advance. When he walks into the board meeting, he should know just what purpose you expect him to accomplish there. The fewer "surprises," the better the consultation.

THE VISIT

Once you have identified your problem, sought out references on someone who is supposed to be an authority, and reached an agreement with a consultant to come in for a certain fee, now what? What do you do upon his arrival? Assuming that he is flying in, do you meet him at the airport or not? If your community has good taxi service from the airport and he will arrive late at night, instruct him to take a taxi to the motel where you have reserved him a *guaranteed* room, and tell him you will call for him in the lobby at nine o'clock the next morning. He will be grateful because he will have a better night's sleep; you will be grateful because you did not have to go chasing around the countryside to pick him up when he really did not want to be picked up. If the consultant arrives in the middle of the day, it is gracious to offer to pick him up at the airport. The ride into town will also give you a chance to talk to him about some of the things that you are going to show him later.

What kind of hospitality should you offer a consultant? Here you should *exercise restraint.* It is very tempting to roll out the red carpet, party him at lunches, take him to a fine place for dinner, sit around and talk for a while, then have a couple of nightcaps. But remember, you are paying him $100 to $200 a day to give you advice about your project. You are not paying him to come and be entertained. If you overextend the hospitality, he will not do nearly the work that he could have done.

Remember also that you have bought

a consultant's services for what amounts to a reasonable work day. You can lengthen that work day beyond eight hours to perhaps nine or ten; but bear in mind that you have not bought the consultant. Do not book up every hour. Give him a chance to catch his breath—to return to the motel and freshen up. Turn him loose an hour before dinner and let him sit down and take off his shoes and stretch out on the bed for a while or watch the evening news.

Who will accompany the consultant? Suppose, for instance, that you have a restoration committee of fifteen members, all of whom are dying to meet the consultant, to learn from this charming "outside" person. But suppose you then have fifteen people going over the site with him, asking him questions about every little item of interest he discovers. He cannot possibly answer all of their questions and, at the same time, do the job he was hired to do.

Only a *small* group should work directly with the consultant. Ideally, this group should consist of people who are known for listening, rather than talking; people who are good at elucidating the problems that you are trying to solve, rather than telling the consultant what a great job you have been doing. The small committee will work more effectively with the consultant; he will do a better job; and your site will prosper as a result.

Avoid the unexpected speech. Do not tell the consultant upon his arrival how lucky you were to be able to book him as the Rotary speaker at noon. That is not what he came for. Avoid, too, the clever trap. Do not bait him into expressing his opinion about matters unrelated to his job simply to justify either minority or majority opinions within your organization. Do not, for instance, ask him what he thinks about the weird color in which the hearth was painted, hoping he will say, "I think it's terrible" so that one or several committee members can say, "See, I told you so."

What about the end of the visit? If he is taking a very early morning flight and there is good taxi service from his motel, he might simply leave on his own. Otherwise, it is gracious to drive him to the airport, bid him farewell, thank him for the good work he has done. And when he has gotten back, write him a letter: "Thanks for coming, we enjoyed having you and are looking forward to receiving your report."

THE REPORT

What kind of report should you expect from the consultant? First, you should expect an honest, open evaluation of whatever the problem was. The consultant should "tell it like it is" even though he knows that some feelings are going to be ruffled. He has to call the shots the way he sees them even if these cause some hard feelings back in the society. That is what you hired him to do—to give an honest opinion. You should expect his report to identify problems that you may not have been aware of.

He should also suggest ways of correcting these problems. A good consultant will seldom tell you what you must do; rather, he will suggest several possible courses of action, including the one that he feels will work best. He should also suggest additional sources of information; that is, he should tell you not only what he knows, but where he has gotten his information so that you can follow up on it yourself. Beyond even this, the consultant should suggest where your society should go next for additional help by furnishing a bibliography and the names of experts who might be useful on specific anticipated problems. Finally, the report should focus not only on the immediate problem, but also on a long range plan toward your ultimate goals.

Inevitably, there will be questions about the precise meaning of statements in the report. It is part of the consultant's job to provide those clari-

fications. It is not fair, however, for you to ask his advice and counsel on new problems that may be encountered in carrying on the post-consultation work without offering an additional fee to pay him for the additional time he must spend in your behalf.

Perhaps when you read the report, the suggestions will seem totally inappropriate. After all, the consultant is writing on the basis of one or two days at your site and you have been living with the problems for fifteen or twenty years. But consider his suggestions carefully anyway—he just may have come up with a new idea. While an outside consultant's unfamiliarity with your local conditions may give him difficulty in identifying solutions, it also gives him a broader perspective. He is able to view the problems more objectively because he is not influenced by the personalities that may be involved. If you did your job properly in getting references and screening the field to get the right person, you should assume, until proven otherwise, that his recommendations are good and are probably worth following.

Use the consultant's report with restraint. If it is pretty harsh about some things that were done in the past, don't broadcast it throughout the organization in all its gory details—especially not to the people who are responsible for the things the consultant deems wrong. You will tear your organization apart in the process, and you will not accomplish what you really want to do —which is to get on the right track now.

Finally, if you get a good consultant report, put it to use. You might send him occasional progress reports or clippings from the local newspaper describing the fruits of his suggestions. And if over a period of a year or two, it seems to be a very fine document, take the time to write him a letter telling him that it was good—everyone likes to know that his work is beneficial.

William T. Alderson has been Director of the American Association for State and Local History since 1964. In that capacity, he has directed numerous seminars on historical society and museum administration and has lectured widely on the work of historical organizations.

Alderson holds degrees in history from Colgate and Vanderbilt Universities. He served as state librarian and archivist for Tennessee before becoming director of AASLH. He currently is a Fellow of the Society of American Archivists and serves on the Board of Directors of American Heritage Publishing Company, the Advisory Council to the Smithsonian Institution for the National Museum Act, and the Museum Panel of the National Endowment for the Arts.

The author wishes to express his thanks to consultant Mary Claire Bradshaw for reading the original manuscript and making a number of useful suggestions.

TECHNICAL LEAFLET 82

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Technical Leaflet

Technical Information Service | American Association for State and Local History

Establishing a Volunteer Program

A Case Study: The Valentine Museum, Richmond, Virginia

by Laura Daly

Volunteer staff augment the paid staff in a majority of state and local history organizations, allowing these institutions to accomplish goals well beyond their means. This source of personnel is critical, especially in light of the increasing competition for decreasing state, local, and grant-sponsored support available for cultural institutions.

The need for volunteer staff support has caused institutions to broaden the range of available job opportunities and benefits for volunteers, thus appealing to a wider range of potential help. Conversely, this dependence on volunteers has required institutions to demand a higher degree of professionalism from volunteer staff, who are the most recognizable link between an institution and its visitors. In addition, volunteer staff often arrive with a college degree and professional experience, and in turn, place reciprocal demands on the institution to provide solid volunteer opportunities which include advanced training, thorough communication, and generous benefits.

Successful volunteer staff programs create a balance between the demands placed on volunteer staff and the training, recognition, and opportunity afforded them. Based on that premise, a small, urban history museum in Richmond, Virginia, sought to identify the components necessary to establish the ideal volunteer staff program.

The Valentine Museum's UPSTART Committee – Unpaid Staff: Training, Achievement, Reward, Tenure – grew out of an awareness that certain aspects of the museum's existing volunteer program met neither the needs of an organization that has experienced fundamental changes and rapid growth over the past five years nor the needs of current or potential volunteers. The director of the museum, therefore, created a paid staff position to coordinate the Unpaid Staff (UPS). The coordinator of unpaid staff (CUPS) then recruited a committed group of current volunteers charged:

- To examine the current UPS program identifying strengths, weaknesses, and potential areas for growth;
- To consider the future plans of the museum and how unpaid staff might play their fullest role in the institution's development;
- To examine existing practices in the field of volunteerism through careful consideration of successful programs at other institutions;
- To design and implement an unpaid staff program at the Valentine, reflecting the findings of the research, that would both meet current needs and

Laura Daly is the coordinator of unpaid staff (CUPS) for the Valentine Museum, where she also chairs the Committee for Development and Planning of Human Resources of paid and unpaid staff for the museum's long range expansion planning.

remain flexible enough to adapt to the rapid growth and change of the institution.

Based on these goals and an in-house survey of the Valentine's current UPS, the committee targeted specific areas for program research. These included practices in recruitment, application, interview, placement, training, evaluation, benefits, communication, and increased opportunities for unpaid staff.

Through a series of phone surveys, the coordinator of unpaid staff gathered reference information from fifteen institutions, ranging vastly in size, scope, and focus. In addition to responding to a series of questions from the UPSTART committee, volunteer coordinators at these institutions sent packets of information on their institution's comprehensive unpaid staff programs.

From these materials, the UPSTART committee identified several institutions' programs with components that seemed appropriate to the Valentine's identified goals and selected two cities, Chicago and San Antonio, where institution programs could be studied in-depth. With specific topics in mind, the committee developed a series of questions and areas of focus. The subjects ranged from average time commitment expected from volunteer staff, to length of training provided, to benefits and rewards offered to the volunteer staff by the museums.

The Valentine sent three UPSTART Committee members and the CUPS to Chicago, Illinois, to study volunteer staff programs at the Art Institute of Chicago, the Field Museum of Natural History, the Chicago Historical Society, and the Museum of Science and Industry. A month later, three more committee members traveled with the CUPS to San Antonio to survey the programs at the Institute of Texan Cultures, the San Antonio Museum of Art, the Witte Museum of Natural History, the Marion Koogler McNay Art Institute, and the Southwest Arts and Crafts Center. In addition, the coordinator made a two-day visit to the Mint Museum in Charlotte, North Carolina.

Although each institution had its special strengths and weaknesses, and vast differences existed in the handling of programs and problems, the committee found several components that appeared in virtually *every* program. Summarized below are the best solutions to each problem the committee posed and some helpful hints picked up along the way.

Recruitment

The Chicago Historical Society appeared to have a well-rounded approach to recruitment. Its philosophy was simply stated by the volunteer coordinator: "If the volunteers are satisfied in a program, they will be its best promoters." The historical society's volunteers recruit by word-of-mouth and by recruitment slide-show presentations before various groups, particularly retired teachers and senior citizen groups. CHS has developed productive networks, again through volunteers, with other institutions and community service organizations. The Science Museum of Virginia, Richmond, on the other hand, uses open houses to recruit volunteers. At these gatherings, the volunteer coordinator leads a round table discussion, then various supervisors and unpaid staff describe volunteer needs and opportunities. The Mint Museum uses a similar format, preferring "job banks" over the presentation style used at the Science Museum. Job banks are manned by volunteers who can speak about each job from experience. Volunteer applications are available at these sessions so that new volunteers may sign up immediately at both the Mint and Science museums. Other good recruitment ideas include distributing flyers on cars and at libraries, including a recruitment slide at the beginning of every film or show sponsored by the museum, and of course, sending the standard public service announcements and news releases. Also, if a particular type of volunteer is being sought – i.e., females, males, seniors, youth, etc. – ask a volunteer of that type to make the recruitment presentation.

Application, Interview, and Placement

Proper interviewing and placement of volunteers increases the likelihood that they will be satisfied with their experiences and, consequently, will do good jobs. In turn, the paid staff will appreciate the presence of volunteers and will create more fulfilling opportunities for them. The occasional careless placement can lead to dissatisfied volunteers and to an even more dissatisfied paid staff.

Of the institutions studied, the Art Institute of Chicago maintains the most thorough system of application, interview, and placement. Prospective volunteers must complete a detailed application that includes work experience and two references that are reviewed by the volunteer coordinator before a phone interview is conducted. During this process, the coordinator makes clear the expectations of the institution to the potential volunteer, which include attending all training sessions; giving 100 hours of time during a school year; a significant degree of studying, and writing a paper that must be presented to the docent corps; and lastly, a probationary period, not unlike an apprenticeship. The

phone interview is used as a time for the volunteer coordinator to discern the potential volunteer's expectations, constraints, and motivations. A *successful interview* is the key to placement in the AIC program.

Other excellent means to achieve proper placement of volunteers include: (1) maintaining a job description notebook, which includes a summary of job duties, basic skill requirements, time commitment needed, and other pertinent information, thus enabling the volunteer coordinator to screen and match applicants to jobs for which they are best suited; and (2) including appropriate supervisors in the second phase of the potential volunteer interviews, which includes any supervisors who will work with the volunteers. The supervisor is responsible for conducting an in-depth interview and for determining if the volunteer has adequate skill and experience to meet the designated job requirements. Because it is ultimately the volunteer and the supervisor who will work most closely, work habits and personalities are also a major concern. A list of interview topics and strong volunteer characteristics (appearance, self-esteem, enthusiasm, oral communication) is a good tool to have handy during an interview.

Training

The Field Museum of Natural History has an excellent training procedure. The institution's basic philosophy – "people who train should be people who do" – and the importance of team exhibition development have carried over into its volunteer programs. The Field sponsors training twice a year on weekdays, evenings, and weekends. Each session is videotaped for those absent and for use as reference material and contains a segment dedicated to general museum orientation, including the Field's goals and plans.

Several paid staff are involved in the training process. An educator (the Field employs one full-time trainer in the education department), a recruiter, the placement coordinator, and a subject area specialist comprise the team of staff who introduces volunteers to topics and techniques that will help them become effective teachers. Experienced docents help develop materials. Volunteers are expected to learn one exhibition thoroughly (no small task at the Field) and are then encouraged to learn additional exhibits over time. The Field maintains that *proper training is the most important part of a successful evaluation process*. School teachers also are offered outreach training to help them make better use of exhibitions. Using outreach programs in a teaching capacity brings in visitors who would not otherwise use the museum on a regular basis.

Scheduling

Three prevalent methods are used to schedule volunteers: ask the volunteer to commit to a certain morning or afternoon on a regular basis, e.g., every Wednesday afternoon; let volunteers sign up on a weekly or monthly basis, permitting individuals to vary schedules as needed; or a combination of both. The average hourly commitment for volunteers is twelve hours per month.

Almost every institution the Valentine committee visited held the view that volunteers are expected to come in at their scheduled times whether or not tours are scheduled. Regular attendance ensures that a volunteer becomes comfortable being at the museum and being recognized as a part of its staff. Moreover, a regularly scheduled volunteer is available to assist in research or other work always needing to be done.

The use of day-captains, responsible for coordinating schedules and groups for the day, is a very effective management technique used at both the San Antonio Museum Association (SAMA) and the McNay. This type of volunteer administration serves several purposes: a volunteer easily can handle the time-consuming task of coordinating schedules and groups; a "mini-team" for each day is created so that all volunteers on a specific day answer to one available person, thereby providing a constant route for communication of problems and successes; a vehicle for self-evaluation also is established because members of a certain day's team do not want to have their reputations tarnished by an indifferent volunteer, encouraging all team members to do the best jobs possible. The Chicago Historical Society, which has a high volume of group traffic, utilizes a multipart form to assure that the volunteer, the group leader, and the traffic controller all receive the same information. This serves as a confirmation system, also, verifying the docent's scheduled tours and the group's commitment to a certain day and time.

Review and Evaluation

Even among paid staff, the topic of review/evaluation is a touchy area. While absenteeism and tardiness are clear and concrete signs of inadequate volunteer performance, presentation skills and style can be obscure and threatening areas to a volunteer, especially to someone who feels he or she is being "sized up" by a member of the paid staff.

One program used for both the Witte Museum of

Natural History and the San Antonio Museum of Art was designed to eliminate volunteer feelings of anxiety during evaluations – the peer evaluation system. With this format, volunteers who have received equal training compare each others' performances and offer constructive suggestions about presentation practices. Before any evaluation can take place, or even be considered fair, the institution must provide the volunteer adequate training. Volunteers must feel well prepared before they can be comfortable about being assessed.

This style of evaluation may not be suitable for all institutions, however. For many places, evaluation still hinges on spot-checking done by volunteer coordinators or supervisors and on comments from visitors and teachers. A universal caveat, however, is for supervisors to avoid dropping in to watch volunteers without prior warning to them. A volunteer should always know in advance of being observed for evaluation purposes. Any problem in the volunteer's performance observed by the coordinator or supervisor should then be discussed with the volunteer. More often than not, volunteers convey a sense of relief if they are asked about problems with their placements or presentations.

Reward/Benefit

Volunteers at the Institute of Texan Cultures offers members of their volunteer corps,"The Alliance," culturally-based theme parties such as Polish Zabawa; pens with the institute's logo; special classes; ongoing training; newsletters (with articles written by the volunteers); and pins with gems on them (the more hours a volunteer contributes, the more expensive the gem). These items are in addition to providing a nice lounge area with coffee, a place to hang their hats, and a paid staff of about six to facilitate the volunteers' experiences.

The Mint Museum has an equally inviting program of benefits. Its volunteer staff receives extensive training and training manuals; previews and special tours of new exhibits; certificates of award; awards that increase in value or prestige with increases in the number of volunteer hours; a special identification badge; volunteer-of-the-week or -month programs; and various contests through which participating volunteers can win special prizes, such as free hours added to their total number of hours. Theme parties, like a "Come as Your Favorite Work of Art or Artist" costume party, are also offered for the volunteer staff to celebrate a new installation at the Mint.

These institutions also offer their volunteers discounts in their gift shops, free museum publications, free admission to the museum, free or discounted admission to programs as well as priority access. Lastly, the social benefits and camaraderie provided through the volunteer experience are themselves rewards, bringing together groups and individuals who support a community resource.

Almost all programs the Valentine committee studied had graded benefit/reward programs that increase as the volunteer increases hours of service. While these institutions had specified the number of hours that volunteers have to fulfill, volunteers could gain extra credit by attending meetings or continuing education sessions or by working at public programs outside normal unpaid staff responsibilities.

Communication

Without exception, every institution visited stresses *the importance of constant and thorough communication with volunteers*. Monthly newsletters and meetings, combined with day-to-day contact, provide the constant flow of information necessary to keep volunteers current with the institution and with any pertinent knowledge about their jobs. (The most creative unpaid staff newsletter that the committee saw was that from the Institute of Texan Cultures, where the majority of newsletter articles are written by volunteers with the rest featuring different volunteers or programs.)

Job Opportunities

All but one or two of the institutions visited or contacted use volunteer staff throughout their buildings, at jobs ranging from docent to lab technician. The Taft Museum in Cincinnati offers a conservation training and job position to its volunteers, The Chicago Historical Society, the Field, and the Institute of Texan Cultures offer volunteers opportunities that include first-person costumed interpretation, many involving presentations of skills, crafts, or equipment. The Southwest Arts and Crafts Center does not use volunteers as teachers, but they do use volunteer assistance with all the other facets of the organization.

The McNay volunteer program is run and supported exclusively by volunteers. A president and board elected from within the volunteer staff make all decisions for the group, including development of funding, allocation of resources, training, scheduling, and motivation. (Their most impressive feat to date was a trip organized by the docent board and paid for by individual docents, to Paris, France, as a training/benefit package.)

The Valentine UPS Program

When the travel segment of the UPS research was complete, written summaries of the committee's notes were submitted, then compiled into a single UPSTART Committee report. A two-year plan was developed, designed to facilitate the changes to occur in the Valentine's program over the next two transitional years. The following list of "common components" were shared by the programs studied:

- Thorough and ongoing assessment of a program's goals and needs.
- Presentation of the museum's expectations and benefits in interviews with potential volunteers.
- Making placements carefully, including in the interview process those people who will work with the volunteers.
- Providing adequate introduction to the institution's purpose and goals and to the paid staff.
- Making training as comprehensive as possible, supplementing it with meetings and materials.
- Communicating with volunteer staff frequently, and creating vehicles for them to communicate with the volunteer coordinator or supervisor.
- Showing appreciation for unpaid staff – a smile, a birthday card, and a place to leave a hat go as far as a great party or a certificate.
- Realizing that volunteers are "part visitor and part staff" and therefore need to be treated with care and their contributions respected.

Most of these suggestions can be implemented even if resources are limited and can be adapted to the scope and size of any program. (In fact, real creativity can emerge from trying to make the means cover the ends!) Based on the UPSTART report and considering the resources available to the Valentine, the UPSTART committee selected various elements from the different programs visited or investigated and molded them to meet the needs of its institution and of the Valentine's volunteer staff, creating a "restructured" unpaid staff program.

After a review of the museum's five-year plan and mission statement, a statement of purpose was formulated that defined the role of the unpaid staff program in the context of the institutional goals. This lends the program viability and commands from the paid staff the support necessary for unpaid staff to work effectively. After adding UPS to the organizational flow chart, the committee then outlined its own program goals, focusing on the next two years as transitional. Finally, the policies and procedures of the unpaid staff program were redefined as summarized below:

Recruitment. After preliminary direct mail campaigns to determine interest levels, the museum is recruiting via several channels. A women's business association and a retired citizens club are the two groups targeted for recruitment. Chairpeople for these groups receive written information for distribution which provides an overview of the museum and its current projects, as well as categorical descriptions of job opportunities available for slide show presentations at group meetings if further information is desired.

The Valentine also promotes its UPS program through press releases, public service announcements, and distribution of flyers from several public locations and the front desk in the lobby of the museum. All information publicizing the program directs inquiries for additional information to the CUPS. For individual recruitment, the following occurs: (1) Potential UPS must contact, by phone or in writing, the coordinator of unpaid staff, asking for further specific information about becoming an UPS; and (2) Upon request, a packet of information which includes the following is mailed: a general brochure about the museum; a current newsletter; several print pieces which provide an overview of current museum projects; a UPS job description overview; and a handwritten coverletter that thanks them for their interest and asks any perspective UPS to call for an interview appointment. This process has proven to be an effective double screening which indicates level of commitment by placing the burden of pursuit on the potential UPS.

Interview, Application, and Placement. The process of interview and application begins when the potential UPS schedules an appointment with the CUPS. The first phase of the interview is a meeting of the UPS and CUPS, where the following is discussed frankly: statement of the needs and expectations of the institution; focus and pace of museum activity; expectations, motivations, and abilities of potential UPS, as well as special circumstances and concerns (a reference list of suggested questions and concerns is included in the UPS program manual for the interviewer's use); particulars of jobs that are of interest to the potential UPS, based on job descriptions provided by the supervisors (each description includes time commitment, special skills required, days required, training required, and general job overview); and, completion of an information sheet to be kept on file in the CUPS office.

At the conclusion of this screening process, a sec-

ond phase begins which includes: an interview between potential UPS and the supervisor of the proposed job; a discussion of training required and scheduling starting date; and, placement agreement for the fiscal year. Supervisors determine if a potential UPS possesses the skills, or at least "trainability," necessary to perform a specific job and afford the UPS an opportunity to meet the people with whom each will work directly. Though placement is not irreversible, it is crucial to the success of paid and unpaid staff working together.

Training. The first phase of training, organized and conducted by the CUPS, is a general orientation to the museum staff, goals, and projects. At the session, UPS tour the museum and the Wickham House, meeting paid staff in context, and learning for what each area of the museum is responsible and in what each is currently involved. Each volunteer receives an orientation folder, which includes: a statement of purpose for the UPS program and mission statement of the museum; a calendar of special dates for UPS (parties, meeting, etc.); policies and procedures for UPS program (rules, benefits, museum emergency procedures); collections profiles; written overviews of marketing projects; public programs and yearly calendar museum events; a staff list with job descriptions; list of board members; letter of welcome from the director; address list of all UPS, with job assignments by each name; and an identification card, time sheet (copy for home), orientation agenda, and orientation evaluation form. Child care, parking, drinks, dessert, and snacks are provided by the museum. UPS bring brown-bag lunches to eat while they listen to presentations.

The second session of training, which occurs on a different day, is directed by supervisors. After meeting for coffee and breakfast, UPS divide into groups where training includes: receiving all pertinent materials specific to their jobs, thorough explanations of particular skills and information necessary for them to work effectively, and on-the-job practice for several hours.

Because UPS staff have diverse jobs throughout the museum, the second session takes varied forms, depending on the area. Historic house docents participate in a longer training period than do UPS who work in the gift shop. Some training includes working with experienced UPS to learn how to present a tour, for example. UPS commit to necessary training time in the interview process and are therefore aware if additional time is required on their part after the initial two sessions. Again, such needs as child care, parking, etc., are provided by the museum.

Scheduling. A unique aspect of the UPS corps at the Valentine is its age range. College students, married women with young children, retired citizens, and people who are employed full-time are all represented within our volunteer corps. Because of the diverse needs of the institution and the UPS who staff it, a system of flexible scheduling was adopted. This system best meets all needs, since staffing the information booth requires a much different time commitment than staffing a public program or collections area. Scheduling occurs in one of three ways:

1. A calendar is provided with the shifts to be covered each month, and UPS fill their appropriate number of shifts by committing to the appropriate number of shifts on the days that best suit them that month (for areas such as the gift shop and historic house tours, which need regular coverage all day, everyday, this process is successful).
2. Calls are made to schedule on an "as needed" basis, and UPS commit to those programs or tours they can cover (this system works well for special gallery tours, public programs, and school tours during slow periods).
3. An option is offered to UPS through which they can commit to two-four mornings or afternoons a month, and they are scheduled automatically at those times (this has proven effective in the gift shop as well and in collections areas and clerical assignments).

The only restriction placed on scheduling is that UPS must give the number of hours each month that is included in the job description submitted by the supervisors. The average time commitment is eight-twelve hours a month, though there are some jobs which only require six hours a month and some project-oriented jobs that need an intense concentration of time for a brief period, such as fundraising activities. Two UPS fulfill their time each month as schedulers for the CUPS.

Review and Evaluation. Review is the tool that encourages growth, hence the forerunners of evaluation must be adequate training, preparation, and dissemination of information. Evaluation is less intimidating to those who have input in its design, and those who perform a job are often best suited to assess its successful implementation. Thus, UPS will work to design a format of evaluation appropriate to each job area. The goal is a combination of paid staff and peer evaluation. UPS work first with immediate supervisors to address concerns or difficulties in the delivery of their jobs. If no solu-

tion can be defined, then the coordinator of unpaid staff is alerted to the issue and works with the UPS to solve the problem. Often a different placement or additional training fulfills the need.

Reward/Benefit. In redefining this component of the UPS program, consideration was given to what could be offered with current limited resources and to what could be offered as the program becomes stronger and the budget increases. Benefits would be based on hourly accumulation each fiscal year by the UPS.

Each person who joins the UPS corps immediately has access to the following: training, continuing education, preview tours of new exhibitions, special bus trips to other museums and historic sites, UPS newsletters, two parties a year, and free admission to the museum. When a volunteer's combined hours – training, meetings, job assignment – equal fifty, their benefits include everything listed above, plus all the benefits of individual membership to the museum: museum newsletters, invitations to openings, discounts in the gift shop, and discounted or free admission to programs. With seventy-five combined hours, benefits include everything mentioned above, plus the privileges of family membership, which extends the benefits of individual membership to all the immediate members of the volunteer's family. One hundred total hours adds to the benefits increased discount in the shop and choice of Valentine promotional pieces, such as glasses, mugs, etc. At 140 hours or more, UPS have access to discounted rental of the facility.

UPS also are given nametags and have an area designated for them with a phone, coffee, coatrack, resource materials, and a question/concern box. Individuals or groups of UPS are highlighted in the bimonthly museum newsletter, and all volunteers have access to several organizations affiliated with the museum including a ladies guild and junior board. Over the next years, other improvements and increases in the benefits program are being planned, including the addition of several higher dollar items from which UPS can choose after a certain number of hours are given.

Communication. UPS listed communication as an area of weakness in our pre-travel surveying, consequently this component received particular attention in the restructured program. Vehicles of communication include quarterly meetings that feature an educational component, a museum update, and a social facet; quarterly UPS newsletters which supplement information every six weeks between meetings; museum newsletters that keep UPS informed about general museum news; a bulletin board in the UPS area used for announcements and opportunities UPS wish to make available to each other and to paid staff; open office doors and a very accessible paid staff; a coordinator of unpaid staff whose focus is facilitating the enjoyable and successful experience of each UPS. In addition, supervisors constantly provide updated information to facilitate UPS performing their jobs more effectively.

Job Opportunities. UPS currently are used in every available area in the museum, and the museum continues to increase the variety of job opportunities by expanding visitor services. New programs that are designed to improve the experience of museum visitors, such as an information booth and greeters for the lobby area, provide new areas in which UPS can work.

Another addition to job opportunities is the daily worksheet system. These sheets, filled out by supervisors, list jobs throughout the building that can be completed in thirty to forty-five minutes, can be started with little explanation, or can be put down to be completed later. These jobs act as "fillers" for UPS who find themselves with extra time during a scheduled shift. They also provide UPS with exposure to different areas and projects in the museum they would not encounter when performing their own scheduled jobs.

The museum's five-year plan includes adding first person interpretation in the Wickham historic house and period rooms and more extensive children's and adult programming. UPS also have opportunities to lead workshops focused on special skills they possess, such as calligraphy. Lastly, we are working toward the UPS program developing a greater degree of autonomy. A variation of the day-captain concept would be successful in several areas staffed by UPS. A working example is the gift shop which is managed and staffed completely by UPS. The shop grossed over $100,000 last fiscal year, thus bolstering confidence in the idea of volunteer management.

Other Helpful Resources. The coordinator of volunteer staff is a personnel officer who must manage the needs and goals of not only the unpaid staff but also those of the institution that must rely on its volunteer help. Managing a program means coordinating and organizing meetings, training sessions, job opportunities, schedules, and parties. The following organizational tools have proven helpful in managing a program and in making a program easily accessible to paid staff in the absence of the coordinator:

• A manual that outlines volunteer staff policies, procedures, master copies of forms, step-by-step instructions, sample materials, etc.

• A meeting checklist that includes elements for each meeting – arranging food, parking, speakers, special equipment, meeting space, etc. (When the meeting is completed these lists can be kept on file serving as references for past topics.)

• Planning worksheets for training sessions that outline who does what and where as well as which materials are to be included.

• When formulating training programs, allow commentary/observation from the volunteers. An evaluation form, distributed at the end of training, accomplishes two objectives: (1) volunteer staff can offer constructive suggestions about weaknesses in a training program to which paid staff may be too close to identify; and (2) the unpaid staff can evaluate the performance of paid staff, creating a precedent for evaluating their own performances.

• Many organizations and institutions have active and successful volunteer programs, so check within your community and surrounding communities first for possible assistance. Also do not overlook the experience and expertise of United Way organizations, whose success depends on the volunteer assistance.

Suggested Readings

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Managing Volunteers for Results. San Francisco, CA: Public Management Institute.

Wilson, Marlene. *The Effective Management of Volunteer Programs* and *Survival Skills for Managers*. Boulder, CO: Volunteer Management Associates.

Contributing Institutions

This technical leaflet would not have been possible without the generous assistance of the institutions listed below, who are in themselves excellent resources.

Art Institute of Chicago
Michigan Ave. at Adams
Chicago, IL 60603
(312) 443-3600

Chicago Historical Society
1601 N. Park
Chicago, IL 60614
(312) 642-4600

Field Museum of Natural History
Roosevelt Rd. at
Lake Shore Dr.
Chicago, IL 60605
(312) 922-9410

Institute of Texan Culture
801 S. Bowie
San Antonio, TX 78205
(512) 226-7651

Marion Koogler McNay Art Institute
6000 N. New
Braunsels Ave.
San Antonio, TX 78209
(512) 824-5368

The Mint Museum of Art
2730 Randolph Rd.
Charlotte, NC 28207
(704) 337-2000

Museum of Science & Industry
57th St. & Lake
Shore Dr.
Chicago, IL 60637
(312) 684-1414

San Antonio Museum of Art
P.O. Box 2601
San Antonio, TX
78299-2601
(512) 226-5544

San Antonio Museum Association
3801 Broadway
P.O. Box 2601
San Antonio, TX 78209
(512) 226-5544

Science Museum of Virginia
2500 W. Broad St.
Richmond, VA 23220
(804) 367-0000

Southwest Arts and Crafts Center
Southwest C
300 Augusta
San Antonio, TX 78205

The Strong Museum
One Manhattan Square
Rochester, NY 14607
(716) 263-2700

Taft Museum
316 Pike St.
Cincinnati, OH 45202
(513) 241-0343

The Valentine Museum
1015 E. Clay St.
Richmond, VA 23219
(804) 649-0711

Witte Museum of Natural History
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TECHNICAL LEAFLET

AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

STUDENT PROJECTS AND INTERNSHIPS IN A MUSEUM SETTING

by Mary Ellen Conaway

The purpose of a student project or internship is for the student to gain knowledge and experience in a specific endeavor. The process should benefit the intern, the mentor, and the mentor's museum. It has been argued by some in the museum field that professional standards require payment to an intern because the intern is working for the museum, much like an employee. If the intern is not paid, the argument goes, he or she has been "taken advantage of" by the institution. However, properly designed internship programs involve reciprocal relationships. When the benefits are reciprocal to both parties, the internship does not necessarily have to involve payment for services.

Under a program that is designed to meet a student's interests and a museum's needs, the student should expect to receive course credit and invaluable on-site experience. Students also will benefit by making professional contacts and by receiving instruction in specific skills. After the internship is completed, students should be able to gauge their abilities relative to museum professionals. They also will have concrete evidence of their accomplishments, struggles, and successes.

PLANNING: THE MUSEUM

A museum can expect to commit considerable time, talent, skills, and resources to an intern. A museum must review its resources—such as its available work space, its available staff, the use of volunteers, and its finances—before committing itself to a program of student projects and internships. Successful internship programs are the result of ensuring that the needs of the student and the needs of the museum are congruent. Adequate preparation, however, often takes several months—sometimes even a year or more. During this time, the museum staff must identify its needs and determine how student projects could be beneficial to the museum.

One method that will help the museum plan for its use of interns is to have each staff member make a list of short- and long-term goals and needs. These lists can be categorized several ways. For instance, a museum may choose to prioritize its objectives according to museum functions, by project length, or by the complexity of the projects. In a small museum, the director or administrator most likely would handle the job of organizing the list of needs; in a larger institution, a curator might be in the best position to do so.

One example of a categorized list is in shown in Appendix A. This particular list was compiled by the staff at the Racine County Historical Society and Museum, Racine, Wisconsin, but any museum can come up with with a similar list. Completion of the full list, of which Appendix A is one part, took ten hours at Racine County. Many institutions may find they can compile and organize a list in a shorter length of time.

After the needs of the museum have been prioritized and categorized in a succinct list, the stage is set to promote the museum as an available project and internship site. To create awareness that a museum is an inviting site to interns, the museum's staff must promote it on a regular basis. However, recognition won't come overnight and may, in fact, take years to accomplish.

There are some general steps that will begin to pave the way. A museum staff member must periodically contact area schools, colleges, and universities to discuss the

availability of the museum's resource staff and facilities for students. When dealing with a high school, it is helpful to meet with the faculty involved with the school's honor program. In a university setting, discussing the museum's resources with the appropriate department faculty, such as the heads of the anthropology, history, and museum studies departments, is often the best way to share your information. After many months of dialogue between the museum staff and the academic institutions, information about the museum should begin to appear as part of student syllabus literature on course options.

Occasionally students will approach museums with their own project proposals. This is an attractive option for a museum that already has taken steps to set up a program for interns. The appropriate staff member at the museum should be ready to discuss the student's ideas. At this time, the key for the museum is to be prepared with a project list and a staff member who is ready to become a mentor.

Today, many educational institutions are suggesting—and some even are requiring—that students seek and perform on-site, museum volunteer projects as part of a specific curriculum. One museum, for example, was approached by an architectural student who requested to do the entire renovation to the interior design for a Victorian-era home. According to the project description, the specific goals of the student were to become familiar with the literature on historic house furnishings and renovation through the museum's documents, photos, artifacts, tape recordings, and oral interviews and to develop a thorough knowledge of the house, its occupants, and the renovation completed to date.

It is easy to understand why universities consider these types of on-site projects to be invaluable learning tools. Museum staff should view these student projects as seriously as those called "museum studies." By taking these projects seriously, the museum becomes known to university officials as one in which trained professionals fulfill a valuable educational role within the community.

Planning: The Student

A large part of the success of an internship rests on the amount of initiative demonstrated by the student—even before the project begins. Students have the responsibility to provide certain pertinent information to museums at the outset of their internships. Guidelines, such as the number of required hours per credit, the student's expectations for professional training, time lines, and faculty supervision, should be clearly stated by the student.

The student should draft a time line for the project. Then, working with museum staff, the student should identify what he or she is expected to produce during the internship period. For example, students should understand that producing a small exhibit will take several weeks longer than researching the documentation on an artifact in the museum's collection.

The time allotted to an internship is limited; therefore, it is important that the student's expectations be reasonable. It is critical for the student to complete a finished product during the internship—one that can be viewed with pride and one that meets a particular need on the part of the museum. The greater the congruence between the student's perceived needs and the museum's resources, the greater the likelihood for success. It has been the experience for the staff at the Racine County Historical Society and Museum that roughing out a plan should take a student two to four hours over the course of several meetings. A final internship agreement may take anywhere from two to eight hours to complete, depending on the length and sophistication of the project.

Clearly, the process described here requires a commitment of time and expertise on the part of museum staff. Museums should be prepared, however, that the return—that is, the product and results of the internship—may not pay off in terms of saved staff time or additional human resources for the museum. The reason a museum should engage in a program of instruction and apprenticeship is primarily to promote its professionalism through its capacity to train students and serve as a mentoring facility. Only secondarily, should a museum expect to accomplish its own goals through the use of an intern. Bringing in new ideas, enthusiasm, and a sense of curiosity will be one of the greatest rewards a museum can receive.

Hiring An Intern

Once the museum is ready to receive intern candidates, there are certain steps that the staff should follow to begin the relationship on good footing. At the outset, of course, all students interested in participating in the museum's program must be interviewed. During this first meeting, the student should be given the museum's list of potential projects, its annual program calendar, a sample of a project or internship agreement, and, if applicable, a job description. The museum project list, such as the one shown in Appendix A, will give the student guidance as to what projects are of high priority to the museum; however, museums should be ready to accommodate the special talents and individual interests that a student may have as well.

During the interview, it is a good idea to establish the terms of the relationship through an internship agreement. An internship agreement is a formal document that spells out the objectives of the internship, the location and duration of the work, and the supervisory aspects of the relationship (see Figure 1).

The intern candidate should expect to take an active role in the development of the agreement and should work with museum staff to define reasonable project goals. In addition, the student should clearly state what specific training he or she expects to receive. These are the objectives upon which the intern's performance will be evaluated; so it is critical that the student and the supervisor clearly understand what these goals are and how they will be achieved during the work period.

Because museums traditionally have limited time, resources, energies, and space, a part of the screening process should test the candidate's skills in planning, organizing, and prioritizing. Any student who cannot cooperate with museum staff to produce a coherent internship agreement likely cannot organize and produce a worthwhile project. Agreeing to work with a student who

APPENDIX A

List of Potential Student Projects and Internships

Education Field

Nineteenth-century schoolhouse:

(a) Review all aspects of the schoolhouse living history program (building, yard environment, volunteer school teachers, instructional materials, etc.);
(b) Evaluate the program as an outside specialist, use interviews and questionnaires with volunteers, students, teachers, and parents;
(c) Recommend changes to the program, including its philosophical underpinnings;
(d) Suggest procedures for implementation and evaluation.

Exhibit guide development:

(a) Become familiar with the history of the county and the museum's exhibits;
(b) Become conversant with museum and educational literature about how people learn and interact in museums;
(c) Given the nature and structure of the museum's exhibits, develop a guide for ages eight through fifteen that will enhance visitors' knowledge and make a museum visit a learning experience;
(d) Test guide and evaluate it; revise as needed.

Outreach kits:

(a) Read literature about "suitcase" and "traveling kit" programs and about learning with museum objects;
(b) Select a subject related to the museum's mission, exhibits, and collection that can be developed into a kit;
(c) Define age or grade level, purpose, goals, objectives, and resources needed;
(e) Provide a final plan for kit production, including costs, components, and a distribution plan.

Exhibit and Collection Fields

Cameras and photographic images:

(a) Research and document every camera and piece of photographic equipment in the museum's collections;
(b) Match photo images from the archive collection to camera type, and describe methods of image production;
(c) Research current methods of image conservation and preservation;
(d) Develop an exhibit format using this information, including a preliminary budget and educational components, for either children or adults;
(e) Work with museum staff to develop and install the exhibit and to test the educational program.

Musical instruments:

(a) Research, document and verify or adjust catalog data on all musical instruments in the museum's collection;
(b) Relate instruments to the county's ethnic and social groups;
(c) Develop an exhibit format based on step (b); Include a preliminary budget, exhibit layout, musical instrument conservation needs, and ideas for associated educational program;
(d) Produce the exhibit and test the educational program, evaluate, adjust, and produce finished products.

Collections Care and Documentation Field

Fabrics collection:

(a) Review literature on care of clothing and other fabrics in museum collections including storage and conservation;
(b) Become familiar with the museum's collection and define a specific part of that collection for focused research;
(c) Research and fully document all items in the focus area;
(d) Recommend procedures for upgrading care and conservation needs, and develop a preliminary budget necessary to address these needs;
(e) Based on an evaluation of available resources, implement the recommendations.

Archive:

(a) Become familiar with literature on archive operations, policies, procedures, philosophies, and conservation;
(b) Review all procedures and policies currently used in the museum and their implications for archive operations;
(c) Become familiar with all archive contents and the museum's mission;
(d) Produce recommended changes in archive procedures that relate to the museum's collections policy and specify how these changes will affect archive content, organization, and use;
(e) Implement the recommended changes;
(f) Evaluate changes and make adjustments to plan.

shows signs of inadequate organizational skills from the outset could later result in a major headache for museum staff. Finally, as with the case of any volunteer, it is prudent to have the student sign a volunteer's agreement that includes standard liability clauses for the museum's protection.

Working With Interns

Honesty, dependability, and initiative are vital characteristics for the student to possess if he or she wants to break into history or museum work. The importance of working well with others and the ethics of the profession should be discussed fully during the interview. The student must understand that written proposals must contain accurate information. They also must be neat and written with clarity, consistency, and completeness.

The key to successful museum work is cooperation. Prior to an internship, a student may have experienced a sense of personal achievement and pride after working alone on research and documentation in an academic setting. When applying their research within the museum environment, however, some students may feel as though their personal achievements have been lost in a sea of daily operational concerns. The needs of museum exhibit staff, custodians, and security personnel, among others, may seem as though they are constraining the student's project goals.

Practical use of academic research within the scope of a museum requires that students take part in a dialogue among staff and be ready to consider different interpretations. Students must learn that a compromise between the views of the pure scholar and the views of museum operations personnel sometimes must be made. In his or her role as a museum apprentice, the student must be willing to communicate and cooperate on all levels.

Examples of this process of applying scholastic knowledge to museum operations should be discussed with potential project personnel. It is often useful to set up role playing models that include various museum staff. In museum studies, applied history, and similar courses that include museum work for credit, students should be given projects that consist of "what if" proposals. The following proposals, for example, might be useful for the student to analyze:

- What if a museum department, such as the research archive, was operated by volunteers, and they consistently failed to assist with your request for documentation and photocopies for your internship project? What steps would you take to resolve this problem?
- What if you developed a concept to explain a cultural practice, but you had no idea how to translate the concept into an exhibit setting? Who on the museum staff would be the best person to help you?
- What if you're a student of design and the museum's exhibit preparator, with thirty-five years of experience, thinks your exhibit design is unstable and too exotic? She refuses to help implement it. What do you do to address the impasse and seek solutions?

Work in museums requires interactive, cooperative behavior within the museum as well as within the community. There are no isolated directors or curators. Students should be given tasks that require them to apply information and skills learned in the classroom toward practical needs. For example, students could be asked to develop short programs that could be presented to school children of varying grade levels. Other ideas might be to prepare writing labels or to organize a time line for completion of an exhibit.

Finally, it is not trite to emphasize that limitations are an inevitable part of life. In light of the inherent limits placed upon time and staffing during an internship, it is important for the student periodically to harken back to the objectives laid out in the internship agreement. Training that helps develop good judgment on how to approach projects and on how to judge the amount of time needed to complete a project is crucial. It is at least as important as the intellectual and creative growth that is cultivated during an internship.

Documentation

A museum project of any length, an internship, or a volunteer program should result in a documented, evaluated report. Few museums can pay stipends to students they are teaching and supervising, but they can make certain that every project contributes to the intellectual and programmatic advancement of the student. Keeping documentation also records the number of the interns who have worked in the museum and tracks the kinds of contributions they have made to overall operations.

Developing and Administering Student Internships

The following points are guidelines and suggestions for developing internship programs within a museum or historical society.

(1) The parties responsible for the project—volunteers, students, interns, museum site supervisors, faculty supervisors and counselors, and others—must agree on the overall nature of the project or internship, including its major components, prior to the beginning date of the project.

(2) The responsible parties must develop a draft of the complete project using an approved format that has been established by the school or by the museum. When an agreement has been reached, the draft should be typed and approved, and the final copy should be typed and signed. A copy should be given to each party. The agreement must have specific objectives that include the following:

- The agreement must be consistent with the purpose of projects or internships at the student's educational institution.
- The agreement should be, ethically and professionally, a sound application of the intern's time and energies at the museum.
- The agreement should have reasonable expectations and goals that can be achieved during the time allotted for the project. The agreement should specify what is due on these deadlines.

FIGURE 1

Sample Internship Agreement

Internship in Museology

Student: John Smith
Address: 100 Main St.
Phone: 414-555-1000
Faculty Supervisor: Dr. M. E. Conaway
Address: Racine County Historical Society and Museum
Institution: Racine County Historical Society and Museum
Internship Dates: May 20–August 23, 1985
Credits and total work hours: 6; 20/week; 280 total hours
Site Supervisor: Dr. M. E. Conaway
Address: Racine County Historical Society and Museum
Phone: 414-555-2000

Objectives of the Internship:

- To develop curatorial skills of collections research, documentation, and evaluation.
- To apply academic knowledge, theory, and the data gathered on a collection to the development of an exhibit and accompanying education packet.
- Using museum artifacts, records, and other research materials, survey and evaluate a collection of artifacts used primarily in a kitchen setting.
- Document items in the collection; recommend with appropriate justification the acquisition of artifacts to round out, complement, or replace artifacts in the collection.
- Develop an exhibit concept, and with that concept, design an exhibit and a compatible educational packet.

Intern

Faculty Supervisor *Site Supervisor*

Internship Guidelines

Record keeping: The intern will maintain a timely journal and develop a portfolio on the project. These materials will be reviewed and evaluated by the site supervisor and the faculty supervisor.
Work Schedule: The internship requires a minimum of 160 hours (3 credits), although 320 hours (6 credits) are encouraged. A work schedule will be outlined and agreed upon by the intern and the site supervisor.
Evaluations: Periodic evaluation dates are outlined. A final evaluation will be made by the site supervisor at the end of the internship. The work will be evaluated on its precision, order, accuracy, thoroughness, neatness, and creativity. The intern will be evaluated on his or her ability to synthesize, follow directions, use initiative, and complete tasks on time. A written evaluation by the site supervisor will accompany the intern's journal, summary statement, and portfolio. These materials will be evaluated by the faculty supervisor, who will assign a grade.
Other conditions: The intern is expected to comply with all requirements of security and public relations applicable to regular staff.

Outline of Internship Objectives:

Research and Curatorial Component

Readings, Documentation, Other Research:
Research kitchen-related items using museum records, library and oral history resources, and the artifacts. Evaluate collection in terms of frontier, rural and town life, and the representativeness of the collection in terms of time, quality, and quantity, and relate these factors to an ability to use it interpretatively.

Skills To Be Acquired: May 20–June 22
Use of a multitude of resources to document artifacts and cultural context; curatorial judgment of a collection.
Due June 22: Written report.
Evaluation: Based on comprehensiveness of the artifact and historical data and skill and creativity used to interpret it.

References:
Schlereth, Thomas. *Artifacts and the American Past.* AASLH: Nashville, 1980.
Quimby, M. B., ed. *Material Culture and the Study of American Life.* Norton & Co., New York, 1978.
Anderson, Jay. *Time Machines. The World of Living History.* AASLH: Nashville, 1984.
References on town history in the museum.

Exhibit Component

Readings, Documentation, Other Research:
Development of an exhibit consistent with 1890–1910 kitchen in town. Design an exhibit with the conceptual theme; include artifact placement, mood, recreational and didactic goals; develop mock-up.

Skills To Be Acquired: June 24–July 20
Concept development based on data at hand, education and experience; scale mock-up production.
Due June 29: Written statement on the theme.
Due July 20: Mock-up and associated written materials.
Evaluation: Based on clarity of presentation and consistency of theme, data, artifacts and interpretative message.

References:
Witteborg, Lothar. *Good Show! A Practical Guide for Temporary Exhibits.* Smithsonian Institution. Washington, D. C., 1981 Neal, Arminta.
Exhibits for the Small Museum. AASLH. 1976 Borun, Minda.
Measuring the Immeasurables. A Pilot Study of Museum Effectiveness. ASTC: Washington, D. C., 1977.

- As a guide to the student, the agreement must include major references and source materials and should reflect basic and timely information in the museum field.
- The agreement should describe a coherent, consistent learning process that involves the application of knowledge, skills, and talents and the acquisition of new information, skills, and techniques. These should be specified as needed.
- There should be specific dates noted for formal discussion among the parties regarding the progress of the project. Evaluations must be built into every step. Supervision, crucial to this form of learning, determines the success of a project as well as the potential for future projects.

(4) The faculty counselor's and museum site supervisor's final evaluations are to be based on the objectives and criteria outlined in the written agreement. The final evaluation should be given to the student, and, in the case of a student working for course credits, the evaluation should be filed with his or her school records. Regular evaluations are very important to the student and the museum staff, which is why taking on student projects and internships is a major commitment, often calling on the staff member's personal time as well.

(5) If, for any reason, the student is unable to carry out one or more of the stated objectives, the museum site and faculty supervisor should discuss with the student acceptable alternatives.

Conclusion

The process described in this article does not advocate any specific length for a project or internship. The length of the commitment is dictated by museum studies' course requirements, a school's course requirements, a student's goals, and the project itself. If the project agreement is formulated as described above, then the experience, training, supervision, and results will be evident. A 120-hour project will not be mistaken for a 360-hour internship in content or evaluation.

Reciprocity, the sharing of benefits among all parties, is critical to the teaching and mentoring of students in the museum field. The agreement between the museum and the intern specifies the breadth and depth of the learning experience. It clearly sets out the importance of sharing and professional exchanges. Reciprocity, therefore, keeps the mechanisms of the internship humming.

Having the student develop the terms of the internship agreement is a positive step toward implementing a successful program. A well-thought-out internship agreement requires the parties to address the nature of learning and sharing; giving and taking. The benefits for both parties will be clearly stated at the beginning of the relationship, and the perception that the student was "taken advantage of" will be eliminated.

Mary Ellen Conaway is director of the Racine County Historical Society and Museum, Racine, Wisconsin.

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HISTORY NEWS TECHNICAL LEAFLET

A PUBLICATION OF THE
AMERICAN ASSOCIATION
FOR STATE AND LOCAL HISTORY

Effective Internship Programs: Mutual Responsibility, Shared Opportunity

BY T. ALLAN COMP, WITH ALEX ROGERS

Each academic semester and every summer break, in locales throughout the land, there are thousands of bright, energetic students looking for the elusive and very necessary "job experience." For those organizations willing to blend the students' want for job experience with their own institutional need for project work, the resulting partnership can be mutually rewarding. Students bring fresh ideas, enthusiasm, and creativity to internship sites and are often willing to work for a small living stipend in return for valuable experience and professional connections not attainable in the classroom. For those institutions willing to meet this student need responsibly and intelligently, the pay-off can be significant and enduring.

Organizations should develop internship projects which utilize a student's knowledge and skill. Photo courtesy of the Southwestern Pennsylvania Heritage Preservation Commission.

Successful programs require funding, planning and organization. While it may seem that only large institutions have the time and budget to manage such ventures, internship programs are not out of reach for small museums, historical societies, heritage organizations, and other non-profit organizations. This *Technical Leaflet* describes the elements essential to a formal internship program and outlines how any organization can develop a program beneficial for both interns and mentoring organizations.

DEFINING AN APPROPRIATE PROJECT

For this *Technical Leaflet,* "interns" are presumed to be engaged in their internships on a full-time basis for a concentrated ten to twelve weeks in the summer or a single semester during the academic year, and are primarily graduate students or graduating seniors. Obviously, there are many other forms of student assistance for historical organizations, some discussed later in this *Technical Leaflet,* but serious "job experience" results from full-time engagement by both student and institution. Full-time internships should be viewed as institutional partnerships — brief but serious mutual efforts with mutual benefits.

The first step is to identify the project for student interns. What projects does your organization need to complete? Which of those are appropriate for an intern? By developing a list of possible projects, and the specific skills required for each, you can advertise several options and attract the best-qualified students. In defining these possible intern projects, remember you are seeking to attract professionals-in-training who possess the skills and knowledge to work on substantial projects. Reserve clerical work and unskilled tasks for volunteers and work-study students from local high schools and colleges.

Internships should result in complete, educationally meaningful products, including reports which your organization can keep on file and the interns can take with them for their professional portfolio.

Interns should be given one well-defined project which they work on full-time from start to completion. The standard three-month internship period makes it crucial that the project be fully planned before the interns arrive. While it is certainly possible to give interns several small projects to work on during the course of their internship, the experience will be much more rewarding for the interns if they are able to focus on a single goal. Internships should result in complete, educationally meaningful products, including reports which your organization can keep on file and the interns can take with them for their professional portfolio.

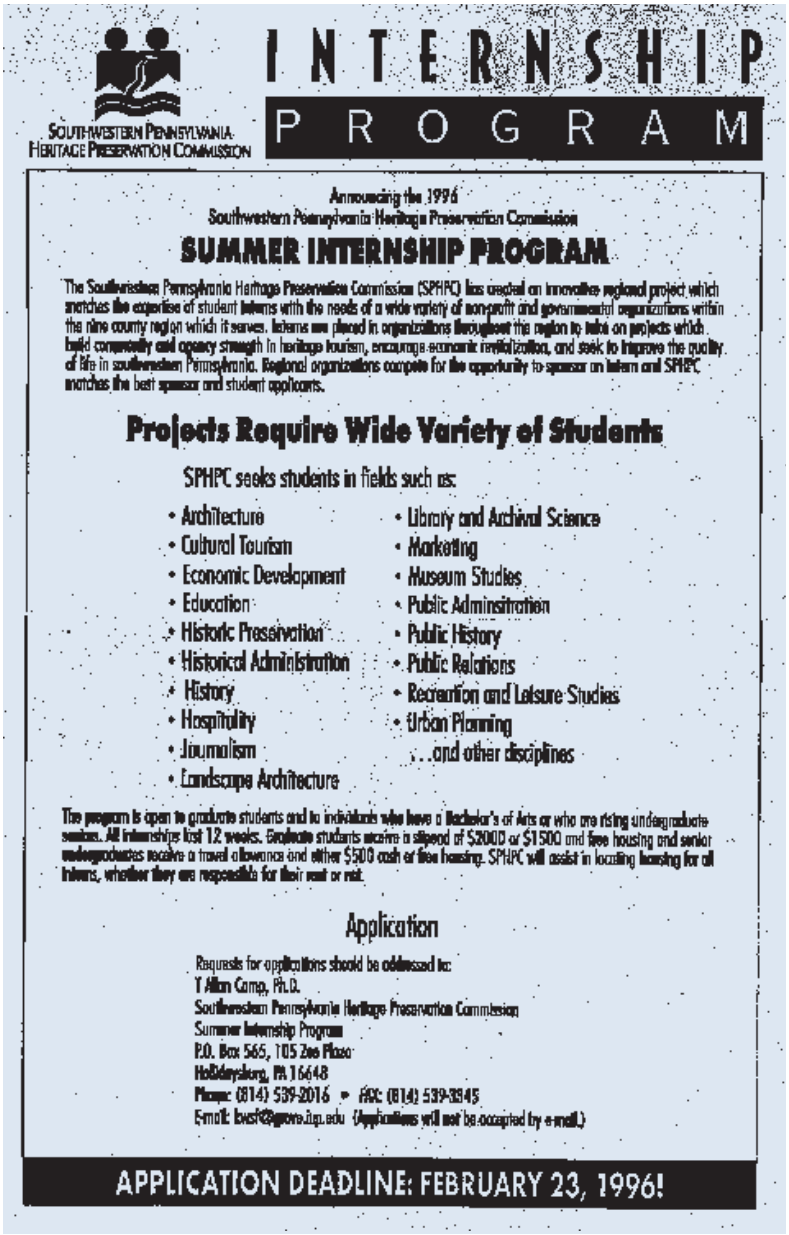
When considering an internship program and developing descriptions for specific projects, remember to think about the administrative costs to your organization. Adequate supervision must be provided if you expect adequate results. Consider the demands of the projects you choose. And, make sure

that you have satisfactory work space for your interns to work—being stuffed in a corner of the basement does little for one's sense of importance within the institution. Determine if they will need access to a telephone, a computer, a car or mileage money, or the Internet. The more details that are resolved ahead of time, the more real work will be accomplished for the organization during the internship period.

SUPPORT, NOT A SALARY

It is important to remember that the living stipend that you pay is not an intern's compensation, but is rather the means to make the experience possible. The lasting effects of the experience they obtain by working on a significant project, along with any professional development opportunities you can provide, is the real compensation for their contributions to your organization.

In order to make your internship program feasible to the widest range of applicants, it should provide students with a stipend that covers basic living expenses, excluding travel to your site. On average, full-time internship stipends run from about $1,000 to $3,000, varying according to the cost of living in a region. Like everything else, the higher the stipend offered, the more applications you are likely to receive. If you intend to employ both graduate students and undergraduates, it is appropriate to pay graduate students at least $500 more.



SOUTHWESTERN PENNSYLVANIA HERITAGE PRESERVATION COMMISSION

INTERNSHIP PROGRAM

Announcing the 1996
Southwestern Pennsylvania Heritage Preservation Commission

SUMMER INTERNSHIP PROGRAM

The Southwestern Pennsylvania Heritage Preservation Commission (SPHPC) has created an innovative regional project which matches the expertise of student interns with the needs of a wide variety of non-profit and governmental organizations within the nine county region which it serves. Interns are placed in organizations throughout the region to take on projects which build community and agency strength in heritage tourism, encourage economic revitalization, and seek to improve the quality of life in southwestern Pennsylvania. Regional organizations compete for the opportunity to sponsor an intern and SPHPC matches the best sponsor and student applicants.

Projects Require Wide Variety of Students

SPHPC seeks students in fields such as:

- Architecture
- Cultural Tourism
- Economic Development
- Education
- Historic Preservation
- Historical Administration
- History
- Hospitality
- Journalism
- Landscape Architecture
- Library and Archival Science
- Marketing
- Museum Studies
- Public Administration
- Public History
- Public Relations
- Recreation and Leisure Studies
- Urban Planning

...and other disciplines

The program is open to graduate students and to individuals who have a Bachelor's of Arts or who are rising undergraduate seniors. All internships last 12 weeks. Graduate students receive a stipend of $2000 or $1500 and free housing and senior undergraduates receive a travel allowance and either $500 cash or free housing. SPHPC will assist in locating housing for all interns, whether they are responsible for their rent or not.

Application

Requests for applications should be addressed to:
T Allen Comp, Ph.D.
Southwestern Pennsylvania Heritage Preservation Commission
Summer Internship Program
P.O. Box 565, 105 Zoo Plaza
Hollidaysburg, PA 16648
Phone: (814) 539-2016 • FAX: (814) 539-3345
E-mail: bwst2@grove.iup.edu (Applications will not be accepted by e-mail.)

APPLICATION DEADLINE: FEBRUARY 23, 1996!

The Southwestern Pennsylvania Heritage Preservation Commission uses this simple and effective poster to recruit students for its summer internship program.

While interns do not need substantial monetary compensation, organizations will have to find some hard cash with which to support their intern and to cover the cost for recruitment and administrative expenses. Do not let these costs seem prohibitive—there are funding sources outside of your own budget! State humanities and arts organizations often provide small grants for technical assistance that can be used to support a skilled intern. Banks and local businesses might view an internship program as a cause worthy of their investment. By donating $1,000 to $3,000 they can support both your organization and the development of a young professional while strengthening your community through cultural and educational development. Inform potential sponsors that internships will be named for the businesses that sponsor them and coordinate press information and other public acknowledgment of their contribution. A dozen letters requesting support for your program may produce only a few positive responses, but that may be all you need to support two much-needed interns and get your program underway.

If you intend to draw interns from outside your immediate region (and doing so will greatly increase the pool from which you select), you should find affordable housing for them. Without housing, an intern may be distracted and distressed until the issue is settled. Interns usually pay for their own housing, but if you have access to free or inexpensive accommodations, include housing in your stipend package. This will lower the cost to your organization while enhancing the appeal and efficiency of the internship.

Keep in mind that an intern's living space can be basic, but it should be separate from their work space and have adequate cooking facilities. Be creative when

looking for housing. Dormitories at nearby colleges, a house owned by someone who is away for the summer, or that spare basement apartment that one of your board members never got around to renting, are all good possibilities. For example, interns of the Southwestern Pennsylvania Heritage Preservation Commission have been housed in an empty convent which the church was pleased to rent out. While it is too difficult for interns and their supervisors to live together, housing interns with local families can work quite well and encourages interns to become temporary members of the community.

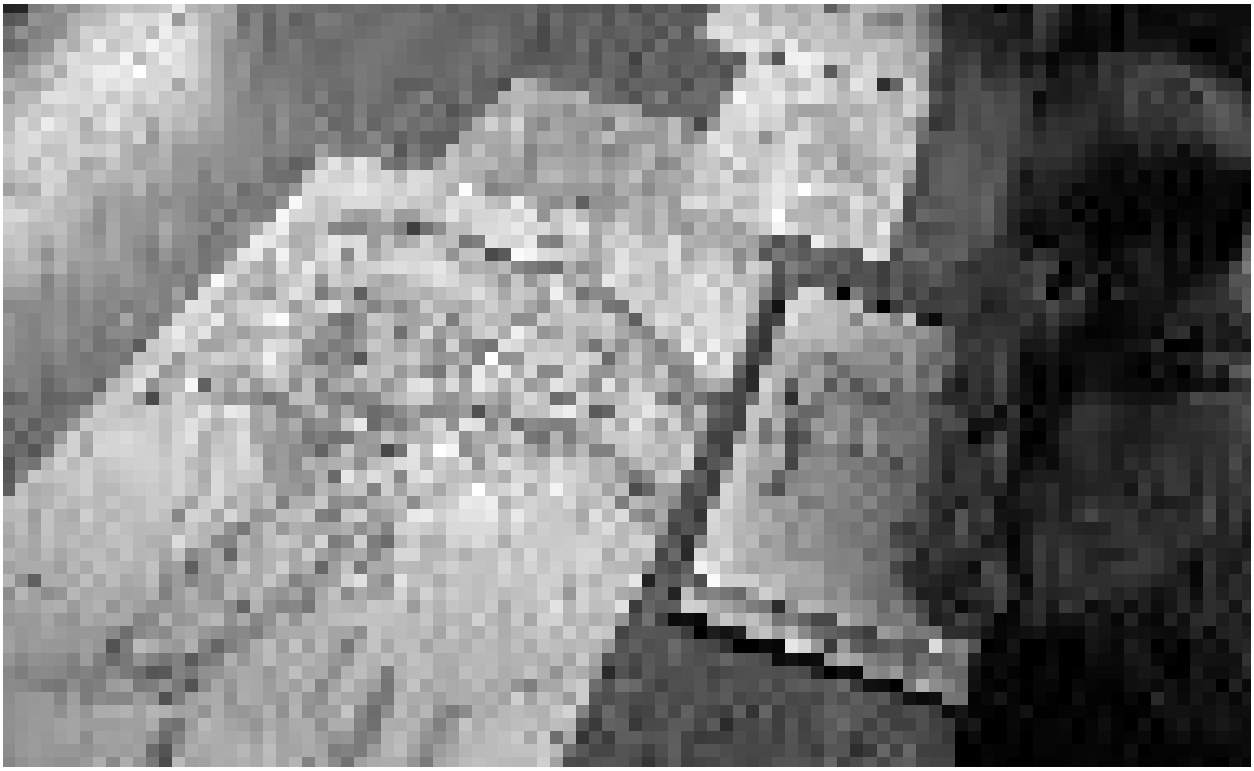
RECRUITMENT AND SELECTION

Just as the development of successful internship projects requires looking inward, recruiting will be both more successful and less expensive if you look outward. Every agency that attempts to recruit good interns must incur certain expenses, but by joining with several other organizations to recruit similar or complementary interns, these expenses can be shared while expanding the reach of recruitment efforts. At the Southwestern Pennsylvania Heritage Preservation Commission we recruit about 30 interns for 30 different agencies in nine counties with one announcement, one information piece, and one evaluation process — the same steps we would go through if we were recruiting only one intern! If there are other agencies similar to your own within your city, county or region, ask them to cooperate on intern recruitment. The result will be better interns for all and (hopefully) better cooperation between and understanding of other cultural institutions.

Targeting numerous venues not only produces a larger pool of talent from which to select your interns, but also builds the reputation of your program in the academic community.

ANNOUNCING THE INTERNSHIP PROGRAM

The halls of colleges and universities are lined with bulletin boards covered with layers of flyers and pamphlets. This is the primary way that students learn about internship opportunities. Effective posters require some thought, but do not need to be expensive. To compete with the other announcement posters, they should be eye-catching and attractive with text that is brief but informative. The mailing list should target appropriate departments and programs. This can be developed with publications such as *Museum Studies and Training in the United States: A Resource Guide* published by the American Association of Museums, the *Directory of History Departments and Organizations* by the American Historical Association, *A Guide to Graduate Programs in Public History* by the National Council on Public History, and *Summary of Historic Preservation Programs* published annually by the National Trust for Historic Preservation. Whenever you know specific names of faculty, use them. It's also a good idea to send a one-



By developing clear definitions of internship projects, organizations can recruit interns who are well-suited for even the most specific work. Photo courtesy of the Southwestern Pennsylvania Heritage Preservation Commission.

Interns often contribute a variety of skills to sponsoring organizations. Photo courtesy of the Southwestern Pennsylvania Heritage Preservation Commission.

page letter of introduction with your poster to provide further information about your program.

If your organization cannot afford a large mailing, there are less costly ways to publicize your program. Professional organizations, including the AASLH, have publications in which members may announce fellowships, employment opportunities and internships, often at no cost. The Internet is also a highly useful tool which both students and faculty have access. (Some listservs and websites are listed at the end of the *Technical Leaflet.*) Be sure you monitor your own mail box or specify that all inquiries must be by U.S. mail. Whatever your method of recruiting, remember it is best to go national. Targeting numerous venues not only produces a larger pool of talent from which to select your interns, but also builds the reputation of your program in the academic community.

RESPONDING TO REQUESTS

Your recruitment tools will attract inquiries and now is your opportunity to spread the work about your program. Informational packets and application forms mailed on request are important ways to promote your program. These materials can be simply printed on your organization's letterhead or professionally produced using photographs and color printing. Either way, your program will be seriously considered if you present it as well structured and carefully planned. At the Southwestern Pennsylvania Heritage Preservation Commission, we know that our organization pays the mailing cost for every inquiry we answer, so our information packet is straight text, relying on the intern's own interest to pull them through the several pages of solid writing.

Regardless of design, packets should include information about the purpose and the history of both your organization and the program, as well as a profile of the director(s). The applicant requirements and details of the program, such as the project(s) description, duration, stipend and housing, should all be clearly explained. The benefits of the program, such as professional development opportunities and special local cultural and recreational facilities, should also be highlighted. After a program's first year, it is also beneficial to include brief descriptions of past internship programs, using quotes from the interns commenting on their positive experiences

EVALUATING AND SELECTING INTERNS

A formal application from an interested applicant is your opportunity to learn about the individual before conducting interviews or selecting an intern. Obtain as much information as possible from the application form. Requesting only a resume and cover letter will result in a wide variation of information. It is recommended to create your own simple application form which requires the standard information, such as their university or college, major and minor, year in school, GPA (in major and overall), and school and permanent addresses. The form should inquire about any specific skills required for the internship projects. When this

For a project at the Southwestern Pennsylvania Heritage Preservation Commission, a group of interns examined and evaluated the natural, historic, cultural and archaeological resources of a small Pennsylvania town. Photo courtesy of the Southwestern Pennsylvania Heritage Preservation Commission.

information is standard on every application, evaluation is more efficient and more effective.

Beyond the factual data, short written answers, limited to the space on the application form, can be remarkably useful. At the Southwestern Pennsylvania Heritage Preservation Commission, we require applicants to provide a short essay describing their professional interests and another asking them to evaluate their own suitability for the position. These short essays provide clear indication of writing skill, perception, and often basic interest in the position. Also, ask applicants to provide one letter of recommendation from an appropriate faculty member or supervisor. This is more convenient than receiving a list of references you don't know and don't have time to call.

Set the application deadline in time to make your decision and notify successful candidates before they have already committed to other opportunities. For a summer program, it is best to make your selections by early April. If you count back from an April selection, you will quickly see that early January is your last opportunity to mail your announcement poster! But don't hesitate to try a last-minute scramble if you don't want to wait until the next year.

FOLLOW UP

It is important to maintain ties with former interns, unsuccessful applicants you might like to see with another year of schooling behind them, and those you just didn't have the funds to hire. An internship program is a way to advertise your organization and its interest in the future development of the field. Intern alums can be a powerful and sometimes personally rewarding group. As your internship program grows in size or duration, word-of-mouth will lead applicants to seek you out. Don't neglect this best form of advertising! For a small fledgling program this can mean an occasional personal letter. Larger programs may send out an annual alumni newsletter. Consider sending the alumni newsletter to internship applicants to illustrate the great things that your program has led to for past participants.

MANAGING INTERNS

Beyond all the normal requirements of good personnel management, interns have a two special needs. Meeting these needs will not require massive amounts of time or money, but will make a world of difference in the internship experience — and its effectiveness.

First, interns are most effective and have the best experiences if they have an understanding of the sponsoring organization, how it functions, and where it fits. Upon arrival, interns should be immediately made aware of the organization's mission, the area and audience that it serves, and how it fits into the broader picture. Interns should be introduced to *all* key staff members, not only those with whom they will be working. They should be informed of staff roles within the organization, the chain of command, where the intern's project fits, and how to get questions answered. Even the seemingly mundane, such as where to find office supplies, is useful information for an intern. A formal, comprehensive orientation session (not a casual walk around the office during their first

morning) provides interns with a context in which to view their own projects and makes them effective representatives of the organization.

If you worked with other organizations to recruit the interns, make sure your new intern learns about those organizations and invite the other new interns to visit your organization. There is nothing quite so useful as finding another fellow student at a nearby institution with whom to talk. Likewise, internships should be opportunities for students to become familiar with the professional world. The more your program can offer to this end, the more appealing and beneficial it will be for the intern. Provide the intern with opportunities to participate in lectures and workshops conducted by your staff or outside professionals, to visit other organizations, and perhaps attend a regional professional conference with other staff. These experiences will accentuate the intern's experience. Keep in mind that the purpose of an internship is to supplement the classroom experience, not to reproduce it. Strive to make available those resources which students do not have back at their college or university.

One of the most valuable aspects of the internship experience is the student's interaction with professional colleagues. Photo courtesy of the Southwestern Pennsylvania Heritage Preservation Commission.

Second, beyond the professional world, encourage interns to become immersed in the cultural offerings of the community. Whether your organization is located in a small town or big city, there are plenty of ways for students to get a flavor of the region through arts and folk festivals, regional cuisine, a local Fourth of July celebration, the symphony, a production by a local theater group, recreational opportunities at a nearby park or just a local hang-out. Interns will not only benefit from their experiences with your community, but the community will become aware of the interns who will serve as good public relations representatives for your organization.

CONCLUSION

While "partnerships" is rapidly becoming the tired word of the nineties, the relationship between an organization and an intern is exactly that. Give your internship program some careful attention and work closely with your intern as a young professional and the results can benefit both sides in equal and great measure. The manifestations of internships are as varied as the interns themselves, but the rewards are there for any institution willing to take partnership seriously.

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INTERNET ADDRESSES: A list of some Internet addresses for internship announcements.

ARTIFACT: Discussion group for those concerned with material culture studies. listserv@umdd.umd.edu

H-LOCAL: Part of the NEH funded H-NET humanities on-line system which contains 57 lists for scholars and others. H-LOCAL targets people interested in state and local history and museum studies. listserv@msu.edu

MUSEUM-L: General interest group for museum professionals. listserv@unmvma.unm.edu

PUBLHIST: Mailing list dedicated to the topic of public history. publhist@indycms.iupui.edu

URBAN-L: Mailing list for information on urban planning issues. listserv@trearn.bitnet

The National Trust for Historic Preservation has a web site, http://www.nthp.org. To list internships on their job board, go to Preserve Link on the website and click on the job board, or email information to sdillard@nthp.org

Other Sources of Affordable Assistance

PART-TIME UNDERGRADUATE INTERNSHIP PROGRAMS

Career services offices at colleges and universities maintain files of organizations willing to sponsor interns. These programs usually involve a student working at an organization one to three days a week. While some require that the interns are paid a wage, most offer the students academic credit in return for their time. Organizations have the best chance to be consistently successful if they work with a university with a strong program in an appropriate discipline that requires internships. Otherwise, interns may only be available sporadically and with little control over quality. This can be a convenient way to obtain short-term student assistance since the educational institution takes care of the promotion and application processes. These programs can work if the intern's time is properly organized.

In this type of situation, and considering the fact that students will generally work only 10 to 20 hours a week, it is absolutely necessary that the project be fully planned before the intern starts to work. However, it is not crucial that the project be one that the intern starts and finishes on his or her own. These students are trying to balance their internship requirements with their regular academic commitments and social lives, and an internship may not receive first priority over finals, term papers or spring break. It is appropriate to engage these students in projects which can continue after their internship is over. However, avoid situations in which a student does not complete a project which may be difficult for someone else to pick up, such as one which involves extensive research or the development of outside contacts and community trust.

STATE OR FEDERAL WORK-STUDY

All colleges and universities are eligible to receive funds for work-study programs (though not all participate) which allow students to work for a wage up to 40 hours a week during the summer and no more than 20 hours while attending classes. The majority of work-study students are placed in on-campus positions, but some schools participate in either state or federal work-study programs which allow them to place students in jobs off-campus. A university's or college's office of financial aid has information on an organization's eligibility for a work-study student, what agency would organize participation the program (usually the state work-study organization), and what portion of the student's wages, if any, organizations would be required to pay. (For instance, in Pennsylvania work-study students cost 60 percent of their usual $5.00 an hour salary; federal work-study students do not cost anything.) These programs can be very competitive in terms of organizational participation, especially for those which do not require the sponsor organization to contribute to the student's wages.

Work-study programs present a situation entirely different from an internship. Interns seek positions in order to learn about a field in which they are interested. Work-study students are placed in organizations because they need to make money to offset the cost of their education and may or may not be interested in a career related to the work of the sponsoring organization. Therefore, it is perfectly suitable to assign work-study students to data entry, clerical work, bookkeeping, and receptionist roles as well as more specialized work their schooling might allow. Work-study students may opt to continue to work for organizations semester after semester, thus enabling you to build on their responsibilities.

AMERICORPS

There about 20,000 AmeriCorps participants serving throughout the United States, some of whom are working on historic preservation and other heritage-related projects. AmeriCorps is a national program administered through federal agencies and through state offices. Each member works full-time for 1,700 hours (about ten months) and may work two years. Agencies involved with senior citizens, low-income housing in historic districts, economic development in rural areas, and many others may be eligible to participate. For instance, the Southwestern Pennsylvania Heritage Preservation Commission has five AmeriCorps participants (all college graduates) working in the most disadvantaged county in the region on improving rural economic development through tourism enhancement. Another five AmeriCorps participants are working throughout the nine-county region on trails, housing, acid mine drainage, and creating opportunities for young professionals in a region that is losing too many of its recent college graduates. Matching funds are required for each position, but the maximum is less than $2,000 for a year-long participant. It takes some bureaucratic persistence, but it is well worth the effort!