Metrics for Volunteering in Archives

Recommendations from the ARA Volunteering Committee

1/19/2016

Version 1.0

Archives and Records Association (UK & Ireland)

Recommendations on Metrics for Volunteering in Archives

Volunteers contribute a great deal to archive services across the UK. This guidance from the ARA Volunteering Committee identifies common metrics used to measure this contribution, and suggests some ways this data can be reused. Such metrics form part of a number of national standards and datasets, including Archive Service Accreditation and the CIPFA returns for local government archive services. They are also a core element of much project activity, demonstrating value for money and levels of public engagement.

We recognise that archive services engage with volunteering at different levels, and that not all archive services will have all types of volunteer. We have divided the recommendations into baseline, intermediate and best practice sections to allow your measurement of volunteering to be proportionate to your activity, and given a range of examples of types of volunteering.

The 2014 ARA report Managing Volunteering in Archives demonstrated growing professionalism and good practice in the management of volunteers. The vast majority of respondent services had a volunteering policy in place. Within that context, the collection of effective and useful data plays an important role, and may be part of a volunteering policy. Collecting data proportionate to the level of volunteering activity enables any service to understand the costs and benefits involved in its volunteering programme. Consistently gathering such data over time will allow the impact of volunteering to be better understood both within individual archive services and across the archives sector as a whole. It also demonstrates a recognition of the value of volunteering across the archives sector, and the very considerable contribution volunteers make to our work.

About this document
This document explores nine different metrics which could be applied to volunteering in archives, from the simplest to the most complex. Any archive service working with volunteers can use this guidance to identify appropriate and proportional metrics for use in understanding the volunteer workforce, and to include metrics in planning any future volunteering developments.

The summary suite of metrics is:

What the guidance contains:
Each metric is explored as follows, accompanied by an example means of measurement:

Content: the basics of what is collected
Measuring: explaining what the data measures
Uses: identifying existing sector activities and surveys that you can reuse this data for, and also examples of how it can be used more widely.
NB: identifying some known pitfalls or areas where you may need to take care in making meaningful measurements

A) Baseline Volunteering Metrics
These basic metrics give you the fundamental information about how much people volunteer with your service: how big is your volunteer workforce. They are simple counting measures and should not be onerous to gather once you have established ways of collecting them. You may have a register of volunteers; sign people in/out on their contribution days; or for remote volunteers have a count of registered users and time spent on site.

1. Number of volunteers contributing each year

Year	Number of onsite volunteers	Number of remote volunteers
2013/14		
2014/15		
2015/16		

Content: A count of every person who has donated time to your archive service.

Measuring: This raw information shows how many people beyond paid staff are contributing to the success of your archive service, and whether this is changing over time.

Uses: It is required by CIPFA and Archive Service Accreditation, and is a basic measure for externally-funded projects.

NB: Remember to count volunteers who do not physically contribute at the archive site, such as bloggers, remote transcribers, and event support staff. You should also include those who donate their time to service management and support, such as Board members. You may have to count project volunteers separately for reporting to external funders. Unless all your volunteers each have only one role within the service, you need to be sure you have a separate overall number count, and not simply aggregate these figures, or you will double-count the total number of people involved in your service. For this and all following measures, it may be useful to collect the data in a spreadsheet that allows you to cross-reference the data flexibly and draw out figures without double-counting.

2. Number of hours contributed by volunteers

Year	Number of hours of onsite volunteering	Number of hours of remote volunteering
2013/14		
2014/15		
2015/16		

Content: A count of total hours of time donated to your archive service, annualised.

Measuring: This raw data shows how much additional time your archive service has gained, on top of paid staff capacity.

Uses: It is required by CIPFA and Archive Service Accreditation, and is a basic measure for externally-funded projects. It allows you to calculate basic financial equivalence: what added value well-supported volunteers are bringing to your service. You can use this in publicity and advocacy, and will need to report it for many external funders.

NB: As above, remember to include on site and remote volunteers and to think about different ways in which your service is given support and time. You may have to count project volunteers separately for reporting to external funders. Keeping the data in a spreadsheet will help with any such analysis, while giving you an overall picture.

B) Intermediate Volunteering Metrics
These measures will allow you to understand in more depth how volunteering affects your service. It will be useful to measure this especially if you have a range of different types of volunteer activity or have been growing your offer. Like the baseline measures, they can be reused in reporting in a number of ways, and are not too onerous to collect once you have set up ways of capturing them.

3. Number of volunteers in different areas of volunteering

Year	Collection Care	Cataloguing and indexing	Family history support	Board members	WW1 volunteers
2013/14					
2014/15					
2015/16					

Content: A count of every person who has donated time to your archive service, broken down by type of work, annualised.

Measuring: This data shows the balance of where numbers of people contribute across the archive service and can be used to isolate data on numbers contributing to specific projects.

Uses: Project- specific reporting of volunteer involvement is required by many project funders; this is a basic component of that reporting. Breaking down all volunteering contributions in this way can help to show which areas of the service are getting support from large numbers, and highlight where there may be temporary, project-based increases in support, explaining why numbers may fluctuate over time.

NB: Be sure you are capturing all the volunteering activity, remote and onsite, and across all the ways that people contribute to your service. Unless all your volunteers each have only one role within the service, you need to be sure you have a separate overall number count, and not simply aggregate these figures, or you will double-count the total number of people involved in your service. Note that some of your project activity may not fit neatly into calendar or financial years and may need to be counted separately to satisfy project reporting requirements.

4. Number of hours contributed to different areas of volunteering

Year	Collection Care	Cataloguing and indexing	Family history support	Board members	WW1 volunteers
2013/14					
2014/15					
2015/16					

Content: A count of total hours donated to different areas of your service, annualised.

Measuring: This data shows the balance of where volunteers contribute their time across the archive service and can be used to isolate data on numbers contributing to specific projects.

Uses: Project-specific reporting of volunteer involvement is required by many project funders; this is a basic component of that reporting. Cross-referenced with 3 above, it will highlight when a large number of volunteers give relatively small amounts of time, and where smaller numbers have made a major and long-term commitment.

NB: Be sure you are capturing all the volunteering activity, remote and onsite, and across all the ways that people contribute to your service. Counting hours contributed as well as overall numbers of volunteers gets around the problem of double counting volunteers who work in multiple areas and gives you a more nuanced picture of where your service is reaping substantial benefits in return for the management and support volunteers require.

5. Length of Service

Name of volunteer	Date volunteering started	Date volunteering ended	Notes
Alan Brown	1 June 1985	-	30 Year Recognition Award 2015
Catherine Donald	29 July 2010	1 September 2013	Summer work placements, 1 month per summer holiday
Elizabeth French	8 May 2008	-	Part of WI project initially, now independent volunteer

Content: A record of when volunteers began supporting your service, and when their contribution ended.

Measuring: This data records how long people contribute to your service.

Uses: Long-serving volunteers can be celebrated and rewarded. Analysing this data will also give you a picture of how fast or slowly your volunteer population changes. If you are looking to volunteering to diversify the people who get involved, this will be valuable data.

NB: The example given above is for people who volunteer in person, and is essential for recording people who are physically part of the workforce. It is likely to be needed for other reasons (e.g. network IDs, insurance). 'Length of service' for a remote volunteer in an online project may mean something very different and be counted differently: for example, by number of pages transcribed rather than months. Gamified recognition such as a leaderboard of contributors, or printable certificates on reaching contribution milestones may be more appropriate forms of recognition.

C) Best Practice Metrics

Best practice volunteering metrics allow you to understand and measure the contribution of your volunteers in depth and over time. They may allow for calculations you can use in demonstrating the value of volunteering, such as the financial equivalence of volunteer contributions, the social and personal impact of volunteer programmes and an increasing diversity among volunteers. Some of these measures are still relatively simple to collect, or can be collected as one-offs, but others need care and preparation to ensure that useful data is identified and collected. If you work with a number of volunteers on long-term projects, this level of data collection can be extremely helpful in understanding the impact on your service.

6. Numbers of volunteers contributing at different skill levels

Year	Collection Care			Board members		
	Professional	Skilled	Unskilled	Professional	Skilled	Unskilled
2013/14						
2014/15						
2015/16						

Content: This measure counts the number of volunteers contributing different skill levels to your archive service.

Measuring: This information breaks down the value that the archive service gets from its volunteers, to understand what level of support is being offered.

Uses: This analysis is primarily used to demonstrate financial equivalence. The Heritage Lottery Fund requires in-kind support to be estimated and reported in this way.

NB: Financial equivalence calculations usually require you to differentiate between skill levels contributed (for impact, financial equivalence, levels of contribution). This can be straightforward (if you have an accountant who donates time to manage the service's accounts, you are receiving a substantial professional contribution; if you have people who help to move tables and chairs for occasional events you are receiving welcome but unskilled support). However, it is worth reviewing how you classify contributions which are less clearly defined – perhaps indexing volunteers who start as unskilled become much more skilled with practice over time. You may want to reflect this with a formal change in recording their contributions after a period of time. Note that tasks that are undertaken may be 'professional' level, but this does not necessarily imply that those undertaking them are qualified archivists. They may be offering other professional support to the service.

7. Number of hours of volunteers contributing at different skill levels

Year	Collection Care			Board members		
	Professional	Skilled	Unskilled	Professional	Skilled	Unskilled
2013/14						
2014/15						

2015/16						

Content: A count of total hours donated at different skill levels to your service, annualised.

Measuring: This data shows the balance of what kind of skill-level volunteers contribute across the archive service and across different areas. Analysing the skill levels involved may be helpful in highlighting aspects hidden in more generic data: for example, where small numbers of participants offer a few hours of time which nonetheless equates to a substantial contribution to the service's running costs.

Uses: This analysis is primarily used to demonstrate financial equivalence, but may also help you to understand how volunteers support different parts of the service and the extent of their contribution. The Heritage Lottery Fund requires in-kind support to be estimated and reported in this way.

NB: As above, differentiating skill levels may be difficult. It may also be hard to estimate hours for those who contribute primarily off-site, or in a professional advisory capacity. An accountant who is also a Trustee may do a great deal more than the raw hours required to attend Board meetings. If you are using this data as part of project reporting, particularly as part of financial equivalence in grant claiming, you may need to capture this directly by asking volunteers to report the amount of time they spend working on that project offsite. Note that tasks that are undertaken may be 'professional' level, but this does not necessarily imply that those undertaking them are qualified archivists. They may be offering other professional support to the service.

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8. Understanding the make-up of your volunteer workforce

Age band	Number of volunteers in this band
Under 25	
26-45	
46-55	
56-69	
70 and over	

Ethnic Group	Number of volunteers in this group
White	
English/ Welsh/ Scottish/ Northern Irish/ British	
Irish	
Gypsy, Traveller or Irish Traveller	
Any other White background	
Mixed/ Multiple ethnic groups	
White and Black Caribbean	
White and Black African	

White and Asian	
Any other Mixed/ Multiple ethnic background	
Asian/ Asian British	
Indian	
Pakistani	
Bangladeshi	
Chinese	
Any other Asian background	
Black/ African/ Caribbean/ Black British	
African	
Caribbean	
Any other Black/ African/ Caribbean background	
Other ethnic group	
Arab	
Any other ethnic group	

Content: Number of volunteers at the service who fall into different social and identity groups.

Measures: the make-up of your volunteer workforce. There is potential to measure many different indicators here, but you could start with considering some of the protected characteristics under the Equality Act 2010: Age; Disability; Gender Reassignment; Pregnancy and Maternity; Marriage and Civil Partnership; Race; Religion or belief; Sex; Sexual Orientation.

Uses: Workforce data of this type is most helpful when compared against your local and/or target demographics, so that you can understand how representative your workforce is of the wider population you engage with. You need to ensure you can demonstrate compliance with the Equality Act 2010 and that you are not discriminating against people on the grounds of protected characteristics; in particular if you actively recruit volunteers, are you doing so in a non-discriminatory way? This data may also be useful to demonstrate diversity in your workforce to funders and/or to your parent organisation, such as meeting targets for participation. It can be essential to understanding whether – if you see volunteering as a means of opening up your service to a wider public – you are making progress. The data may highlight key vulnerabilities or strengths in the diversity of your workforce.

NB: Collecting this data can be valuable. However, it covers what some consider to be sensitive issues and can be resented by your volunteers, especially if you collect it in a heavy-handed way for people donating small amounts of time. Explaining the context and what you want to get out of understanding your volunteers may be helpful in that regard. Pragmatically, you may opt to monitor the diversity of long-term volunteers, and any volunteering opportunities you recruit to formally (including any unsuccessful applicants), rather than trying to capture diversity data for casual and temporary support.

Data relating to individuals and some equality measures may well be sensitive personal data, so ensure that you are collecting and retaining it in accordance with the Data Protection Act and/or in anonymised form. The Office of National Statistics offers guidance on generic bands to identify many diversity categories (the ethnicity bands above are an example), which will help to standardise your measurements and avoid any outdated terminology (www.ons.gov.uk).

9. Measuring the impact of volunteering

Measuring the impact of volunteering is probably the most difficult but most rewarding aspect of developing metrics for volunteering. Unlike the measures described above, impact measures are hard to generalise. The type of volunteering and the aim of the service in offering volunteer opportunities are critical to deciding what the intended outcomes are, and what impact can be identified as significant or measurable.

It is also important to understand and identify where you are aiming for impact. Is this activity for the benefit of the volunteers, for the archive service, for a wider purpose? This will also affect what you measure and how. Organisational impact may focus on quantitative measures which can readily be captured (number of indexed items, reboxed materials), or on what volunteering enables the archive service to do (offer a buddying system to new users, which staff do not have capacity to deliver; give professional development opportunities to staff who do not have the opportunity to manage colleagues; include voices of committed service users in planning service development).

Measuring impact on the volunteers themselves can also take many forms. Where volunteering is undertaken with a particular goal (such as gaining experience of archives work as professional development, or as a means of returning to the workforce for people who have been out of work for some time), there may be some very tangible impact measures: employment, particular skills gained, successful applications for professional training. But in many cases, the positive impact of volunteering on individuals is more an ongoing emotional, than goal-oriented one. Volunteers often value the sense of community and activity which being part of an organisation offers. This can readily be captured in anecdotal form, but there are also more rigorous approaches available if this is appropriate for your service and its reporting needs.

There are many tools available to help you identify and assess the impact of volunteering. The NCVO produces for sale a Volunteering Impact Assessment Toolkit: https://www.ncvo.org.uk/component/redshop/1-publications/P78-volunteering-impact-assessment-toolkit, which provides a generic overview.

For some types of volunteering aiming to improve wellbeing or increase learning, there are generic outcome measures which aim to measure what are often regarded as purely qualitative outcomes from activity. The Inspiring Learning for All Generic Social Outcomes and Generic Learning Outcomes may be helpful: http://www.inspiringlearningforall.gov.uk/toolstemplates/genericsocial/, http://www.inspiringlearningforall.gov.uk/toolstemplates/genericlearning/. More recently,

the UCL Museum Wellbeing Measures Toolkit aims to provide another means of measuring the emotional outcomes of activities: https://www.ucl.ac.uk/museums/research/touch/museumwellbeingmeasures/wellbeing-measures.

Content: varies.

Measuring: varies.

Uses: Inevitably, the use this information can be put to depends on what you are measuring and why. If volunteering is identified as contributing to a health and wellbeing agenda for example, following a formal methodology for capturing wellbeing outcomes could be a significant part of reporting. Capturing the impact of volunteers' contribution to the service is important in upward reporting and is often valuable to reflect back to your volunteers as thanks for their hard work. The impact of your project on volunteers, the service and the wider archives sector is a key metric for award schemes such as ARA's Archive Volunteering Award.

NB: In measuring impact, there are two main consistent requirements. First, ensure your methods and aims match your means. This can become a time-heavy activity if you seek statistical rigour for personal outcomes, which is may only be appropriate for large projects and formal reporting mechanisms. Secondly, as far as possible establish what impact you intend volunteering to have in advance, and seek to measure that. While many side benefits may accrue from positive engagement with volunteering – and you may capture these in qualitative form, or ultimately incorporate them in your intended volunteering outcomes as your work develops – impact measurement should primarily be against your original aims.