



THE NATIONAL TRUST

Volunteer & Supporter Group Conferences

Spreading the word and having your say

Final Report to Delegates

March 2009

'I think conferences are an excellent way of keeping up to date with the latest information which I can share with people in my area, and of making useful contacts. I am a long-time supporter of the Trust. It's great fun; you make friends, feel valued and feel you can make a contribution. I can't wait for the next one. What more could you ask? I wouldn't have missed it for the world.'

Kath Oakley – Sheffield delegate; Working Holiday Leader and volunteer at several East Midlands properties.

'I thought the conference in Sheffield was excellent - in a different league to previous meetings which may have been partly down to the wider mix of delegates. ... a very relevant and well put together day. I found the group discussions really useful. It was valuable to hear first hand what volunteers feel about some of the big issues. I would definitely support another such event.'

David Ronn – Sheffield delegate; Regional Director, Yorkshire and the North East.

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Executive Summary

At the end of 2008 three conferences were held for National Trust volunteers and members of Supporter Groups. These events built on successful conferences previously organised for members of Centres & Associations. Around 350 volunteers (with about a quarter from Supporter Groups) attended, along with approximately 70 members of staff including Regional Directors.

Conference objectives

1. To deepen the Trust's relationship with volunteers by providing an opportunity for feedback on their volunteering experience and consider how it could be improved.
2. To support volunteers with involving others in the work of the Trust by sharing information on the strategy and discussing their role in delivering it.

What's working well?

The atmosphere of the conferences was very positive and constructive. Many delegates talked about the pride they felt about their volunteering and involvement with the Trust. Words such as 'magical' and 'exciting' were used to describe individuals' experiences. Many spoke of how they felt valued, how volunteering was a great way to meet people and make new friends and how their confidence had grown, or how they had learnt new skills, as part of their involvement. Many were keen to contribute even more through their volunteering.

What needs improvement?

While there were many examples of excellent volunteering experiences across the Trust, delegates highlighted that we could further improve and develop volunteering in five key areas:

1. Communication
2. Support and management of volunteers
3. Induction and ongoing training for volunteers
4. Utilisation of existing volunteers' skills and experiences
5. Broadening our appeal

Going forward

Detailed within this report are numerous actions that will be taken by the Trust, particularly the central volunteering team in partnership, wherever possible, with volunteers.

If long term change is to happen, staff and volunteers across the Trust will need to work even more closely together.

The conferences were a great success and the Trust is recommending that they should be repeated, although at a more regional level.

The Trust wishes to thank all the volunteers and members of Supporter Groups who attended and contributed their time, energy and thoughts on the day and hopes that the three events were just the starting point for ongoing improvements to the volunteering experience.

1. Introduction

At the end of 2008, three conferences were held for National Trust volunteers and members of Supporter Groups. This was a new initiative that built on the achievements of the territorial conferences previously organised for National Trust Centres & Associations. The events were managed and coordinated by the Trust's Central Volunteering Team (with a team of volunteers) and supported by a sounding board of 10 volunteers who reflected the breadth of volunteering roles and experiences in the Trust.

The conferences were held at Watford, Sheffield and Heelis, the Trust's Central Office in Swindon. Around 350 volunteers attended the events along with 70 members of staff whose primary role was to ensure the smooth running of each event and facilitate workshops alongside volunteers. A broad range of volunteering roles were represented, with the majority of delegates having a regular role in a property and/or membership of a Supporter Group.

This report is a record of the three conferences. It details the main learning points and proposes several actions under five development areas. It is primarily written for the delegates who attended a conference. It will also feed into longer term organisational planning; for example it has informed a National Trust Council debate being held early in April 2009.

2. Outcomes – areas for development and associated actions

Evaluation showed the three events were all successes in themselves.^a However, they also mark the start of better dialogue with volunteers to look at ways to increase their involvement with the National Trust and ensure that the volunteering relationship remains mutually beneficial.

A number of ways to improve the volunteering experience were highlighted by delegates across all three conferences. While some areas lead to specific recommendations and can be improved in the short term, others will require further discussion and exploration.

The five main areas for development are:

1. Improved communication; including promotion of Supporter Groups
2. Improving support for and management of, volunteers
3. Better induction and ongoing training for volunteers
4. Better utilisation of existing volunteers' skills and experiences
5. Broadening our appeal

Most of the actions listed in the following sections are being taken forward by the Central Volunteering Team (CVT). Where appropriate, opportunities for volunteers to actively support progress are highlighted with a ○ bullet point; necessary contact details can be found on page 12. As with the three conferences, success will rely on working closely together.

^a See section 3.2 on page 9

2.1 Improved communication & promotion

The conferences provided an opportunity for volunteers to hear about National Trust strategy, share experiences and make suggestions for improvement.

The events also raised awareness of the work of Supporter Groups amongst the wider volunteering community. This was seen as an important step to build on and a number of actions, detailed in the interim report, have already been taken to do this.

A common frustration expressed at the conferences was the lack of regular communication at all levels. Delegates also felt there were not enough opportunities for them to raise issues and to feed into decision making. There was also a strongly held perception that the Trust is overly bureaucratic.

Many delegates highlighted good practice already in place at properties and within groups. These included use of regular e-mail updates, newsletters, whiteboards, pre-season meetings, volunteer forums, local surveys and involvement of volunteers at team meetings etc.

Actions

- Central Volunteering Team (CVT) to explore how articles from *Active* magazine can be used to promote discussions with volunteers via the website. (July 2009)
- CVT, working with volunteers, to raise the profile and increase the use of existing volunteer web based communities. More details will be found in every edition of *Active* and volunteers are encouraged to get involved. (Ongoing)
- All delegates to encourage local initiatives to explore and develop electronic communications. For example at Knole (South East) an IT volunteer is currently exploring setting up a Google group to share information between volunteers about the history of items in the property. (Ongoing)
- CVT to explore options for ongoing e-mail contact with conference delegates. (July 2009 onwards)
- CVT to investigate the introduction of property focused volunteer surveys. (Proposal May 2009)
- CVT to develop a communications plan to raise the external profile of volunteering within the Trust. (June 2009)
- CVT to continue to raise the profile of Supporter Groups within internal communications. Groups are encouraged to build local networks through which they can promote their own work and recruit new members. (Both ongoing)
- Volunteers are encouraged to join their local [Centre or Association](#). (Ongoing)

2.2 Support and management for volunteers

The importance of good support and management was expressed across all three days. It has also been reinforced by the recent Volunteering Survey where good day-to-day management was seen as essential in enabling volunteering to be both worthwhile and enjoyable.

A key challenge that limits many properties and groups is the capacity (time, resources and skills) of staff to manage volunteers. There was also an underlying feeling that volunteers can be viewed as an 'unpaid resource' and taken for granted.

Existing good practice was again raised by many – with Working Holidays and National Trust Volunteer Groups highlighted as good models of where volunteers were leading or managing others.

Delegates felt that the Trust's approach to volunteer management should be professional, enabling and enjoyable rather than bureaucratic and controlling. Many delegates were in favour of volunteers managing other volunteers as long as the reasons were clearly communicated and that staff maintained regular contact with all volunteers.

Actions

- CVT to evaluate and share learning from the 15 pilots looking at volunteers managing others. Ongoing updates will be made available via *Active* and online groups. (Ongoing)
- All to highlight new opportunities or existing good practice in the area of support and management for volunteers to Linsey Winter at Heelis. (Ongoing)
- CVT to introduce new training programme for managers (staff and volunteers) of volunteers. (1 day introduction workshop to be launched in June 2009)
- CVT to investigate improvements to formal recognition for volunteers. Contact Michael Tombs if you would like to be involved. (Sept 2009)
- CVT to update the Trust's 'Policy on Volunteering' to make it clearer what volunteers can expect from the National Trust and what the Trust expects from volunteers. (October 2009)
- Supporter Group members to contact Caroline Cooper at Heelis to support the development of a set of 'service standards'. The standards will clarify expectations of support between the Groups and the Trust. (Working group to start April 2009)
- Supporter Group members to contact Caroline Cooper to help with facilitating sharing of learning / setting up networks between groups. (Ongoing)
- Updated guidance on insurance to be circulated to Supporter Groups (April 2009). CVT to investigate potential for changes in future policy with respect to age limitations. (Ongoing)

2.3 Better induction and on-going training for volunteers

The importance of a planned and thorough induction programme was raised by many delegates. There was a feeling that many new volunteers were being 'put off' by a lack of induction and only minimal support to learn the necessary skills and knowledge for their role; particularly for volunteers in visitor facing positions.

Many delegates also requested greater access to ongoing training and other, more informal, forms of learning.

Again good practice was shared by many. One example was Croome Court in the West Midlands where a new team of volunteers are being recruited for the planned opening of the Court later in the year. All the volunteers will undertake a six session induction course covering everything from a 'Who's who?' of Croome through to customer care and skills such as storytelling.

Many examples were given of experienced volunteers buddying and shadowing others. In addition, at places such as Mottisfont in Thames & Solent, a group of volunteers are also leading on the design of a new induction programme.

Workshops to support the transition from Room Stewards to Room Guides are also being piloted in two regions and the success of these was highlighted by those involved. These workshops encourage volunteers and staff to work together to clarify expectations and discuss their roles in involving visitors more with our work.

Actions

- CVT producing new Selection & Induction guidance and training to support Volunteer Managers at properties. (Guidance available from May 2009)
- CVT to review and update Volunteer Welcome Pack and registration form. Contact Rachel Clark at Heelis if you would like to be involved. (Due October 2009)
- Where appropriate, regions and properties to run a Room Guide Workshop – learning from two pilots in West Midlands and Devon & Cornwall. Volunteers interested in helping facilitate these and other workshops/ training should contact their line manager or regional Community, Learning and Volunteering team. (Summer 2009 onwards)
- CVT to adapt the Room Guide Workshop so that it can be used in volunteer inductions for volunteers in visitor facing roles. (Work to start in September 2009 with delivery in 2010)
- Delegates encouraged to share their learning via online groups, by submitting stories for *Active* and by nominating their work for the [Marsh Heritage Award](#). (Deadline for 2009 Award submissions is April 30)
- CVT to continue with investment in improved selection and training for Working Holiday Leaders. (Ongoing)

2.4 Better use of existing volunteers' skills and experiences

An overwhelming message from delegates was that many would like to contribute more to the work of the Trust.

While there are barriers to this happening, there were numerous examples of where the specialist skills and experiences of volunteers and Supporter Groups have added real value to the work of the Trust. These included Speke Hall (North West) where a retired draftsman has produced technical drawings of closed areas of the property to help bring them alive for visitors.

Across the Thames & Solent and South East regions there are networks of building surveyors while in Wessex a volunteer is advising on market segmentation. Across other regions there are some great examples of volunteers as mentors to staff, trainers, speakers, facilitators, project managers etc.

Suggestions included the development of a national skills database, local skills audits, building in questions to recognise wider skills and experience at selection, a 'do you have skills' comments box etc.

The Trust is finding that the current economic climate is encouraging more people to consider volunteering. Motivated by opportunities to keep active, maintain skills and try something new, people are looking for a volunteering opportunity that meets their needs. This presents the organisation with a real opportunity to draw on skills and experiences we might not normally have access to.

Actions

- CVT to promote, within all internal publications, examples of volunteers and Supporter Groups involved in decision making and using specialist skills. (Summer 2009 onwards)
- CVT to work with departments across Heelis to develop and promote volunteering opportunities for people with specialist skills. (April 2009 onwards)
- CVT to explore the potential for a national volunteer forum / expert panel – to look at ways for volunteers to support decision making and share skills across the organisation. (Work to start April 2009)
- CVT to work with Governance team to identify opportunities for members of Council and Regional Committees to share their skills & experience. (April 2009 onwards)
- CVT to identify changes to Volunteer Management System (the database used at properties to hold volunteers' details) to allow properties to capture skills and also to produce written guidance on use of Skills Audits. (September 2009)
- The Orchards Project, recently set up to restore and conserve traditional orchards, will create numerous opportunities for volunteers with skills and experiences relating to orchards. Contact Kate Merry to receive a regular project newsletter which will detail ways to get involved.

2.5 Broadening our appeal

A common and important theme appearing at all of the conferences was that of diversity – what the Trust is doing to involve future generations in volunteering and especially people from local communities, ethnic minorities, young people etc.

In line with its core purpose of ‘for ever, for everyone’ the Trust recognises the importance of encouraging diversity and achieving equality among volunteers, as well as employees, members and visitors.

The National Trust Council has established diversity as a key priority and there is a lot already underway in the volunteering area, including:

- In the North West local properties have been working with Mencap to involve volunteers with learning disabilities.
- Heritage Lottery Fund projects such as ‘London Voices’ (Thames & Solent) and ‘Whose Story?’ (West Midlands) encourage people who would not normally visit our properties to get involved.
- A ‘V-Involved’ team worked across the South West to involve almost two thousand young people (aged 16-25) in volunteering opportunities with both the Trust and English Heritage.
- A partnership with the Prince’s Trust called ‘Getting Into the Past’ at 17 properties. This project provides opportunities for young people to build their confidence and experience in areas such as conservation.

Actions

- CVT with the Head of Access to support identified properties in piloting Equal Opportunities monitoring of volunteers. (Ongoing)
- Volunteers with experience of working with particular audiences (young people, disabled people, ethnic minorities etc.) are encouraged to share their knowledge with local teams / managers. (Ongoing)
- Drawing on the experience of existing projects, CVT, together with the Head of Access, to develop training for volunteers in visitor-facing roles on welcoming visitors with a variety of needs. (Work to start in September 2009 with delivery in 2010)
- A group of staff and volunteers are exploring opportunities for families to volunteer together. Pilot locations include Clumber Park (East Midlands) and Gibside (Yorkshire & North East). (Ongoing)
- CVT to share findings of Quantock project with other Supporter Groups. The project has, amongst other things, looked at the role of the Quantock Centre in relation to the local community and its appeal to new audiences. (Report due April 2009)
- CVT to distribute guidance on Encouraging Inclusion of Disabled People in Supporter Groups via the Supporter Groups newsletter to ensure that everyone is welcome as a member of a group. (March 2009)

3. Lessons learnt from the 2008 conferences

3.1 Objectives and format of the day

The main objectives of the three conferences were:

1. To increase volunteers' understanding of the 2007-10 National Trust strategy and their role in delivering it
2. To celebrate and thank volunteers for their involvement and achievements
3. To increase volunteers' understanding of who National Trust supporters are and enable them to explore their role in engaging with them
4. To provide opportunities for volunteers to feedback on their experiences
5. To provide an opportunity for volunteers to network and share experiences in an enjoyable way
6. To enable participants to share their learning with other volunteers unable to attend

The format of the day reflected the dual role of volunteers as both supporters in their own right and encouraging others (visitors and local communities) to get involved.

A specific session was held just for members of Supporter Groups to discuss current issues and follow up on the conferences held three years ago.

In addition, chances to speak to and hear from senior managers such as the Director General and Regional Directors were included in the programme. A touch of light entertainment came in the form of a different input poem at each conference.

3.2 Evaluation

Almost a third of delegates completed evaluation forms and based on these responses, and informal feedback received, it is clear that overall the conference objectives were achieved. Main findings:

- 82% of delegates agreed that as a result of the day they had a better understanding of the strategy. 73% agreed that they had a better understanding of their role in delivering it.

'I believe my contact with visitors to my property is even more important than I had realised. I am always happy to interact with the public, but now I see how I am really a face for the Trust.' (Watford delegate)

- 87% felt that the Trust fully recognises the positive impact that volunteers make.

'...Much useful discussion ensued and one felt there was a feeling of optimism that the Trust / volunteer relationship was changing for the better.' (Heelis delegate)

- 80% agreed they had a better understanding of who National Trust supporters are.

- 78% agreed that they had enough opportunities to feedback to the organisation. 84% agreed that they felt listened to. A number of delegates expressed some concern that actions might not be followed up.

'... Will the National Trust follow up on ideas and see it through? What changes as a result of today?? Over to you!!' (Heelis delegate)

- 90% agreed that they had enjoyed themselves.
- 82% felt that there was an appropriate balance between workshops, networking and formal inputs. More time for networking would have been appreciated by many delegates.

'There was an appropriate balance to the day, but I didn't speak to all those I had wanted to. The networking part could have been planned in terms of ice-breaker sessions or buddying up with another volunteer.' (Heelis delegate)

'I enjoyed meeting other volunteers - from other properties and those involved in different aspects e.g. garden, National Trust organisations, other roles.' (Watford delegate)

- 82% of delegates had plans to share learning from the three days and the majority completed a postcard at the event committing to sharing their learning.

3.3 Moving forward

The transition from conferences being just for members of Centres & Associations to events open to all volunteers was very smooth.

For many delegates the highlight of the events was being able to meet volunteers with so many different roles and from many different properties. Any future events will need to balance this with requests from delegates (particularly from members of Supporter Groups) for more time to talk about role-specific issues.

The opportunity to talk with senior staff and ask questions of them was greatly appreciated. Over 100 questions were submitted across the three venues for the panel session at the end of the day. While it was not possible to answer all those questions immediately a response to every question is available for delegates alongside this report.

Many comments were made prior to and during the events about the locations chosen and the distance some delegates had to travel. Venues were chosen based on budget and the previous experiences of organising Centres & Association conferences. Any future conferences will be more locally organised which should reduce the travel requirements for all delegates.

Actions

- CVT to work with regional teams to identify opportunities to bring volunteers and Supporter Groups together. These events should build on existing annual meetings / conferences. (The East of England has already taken this initiative and a joint conference is being held on 2 April 2009. For other regions the shift is to start in 2010.)
- Regional teams to ensure property staff are more involved in planning and attending future volunteering events. Properties should at the very least be asked to nominate volunteers to attend; this will support their role in sharing learning after the event.
- CVT to work with regional teams to identify opportunities for volunteer led events and workshops to encourage greater skills sharing. These may take the form of themed events such as gardens and orchards or food or Room Guides.

4. Conclusions

- The volunteer and Supporter Group conferences were a successful starting point for what the Trust hopes will be an ongoing dialogue with volunteers.
- Volunteers have a huge sense of pride associated with their volunteering and involvement with the National Trust. 94%^b would recommend volunteering with the Trust and many volunteers would like to contribute more to the work of the Trust.
- There are five key areas where further improvements can be made to the volunteering experience: communication; support and management; induction and training; utilisation of skills and the breadth of the Trust's appeal.
- The Central Volunteering Team, working with volunteers wherever possible, will take numerous actions in the next 12 months to make improvements in these areas.
- Real change will take much longer than a year and will depend on all staff across the Trust working together with volunteers to bring about a shift in the way volunteers are involved in supporting the organisations work.

5. Thanks

The Trust wishes to thank all the volunteers and members of Supporter Groups who attended a conference and contributed their time, energy and thoughts on the day.

Particular thanks go to the members of the sounding board and those volunteers who helped to run workshops, spoke or had some other input to a conference.

Thanks to all the staff that attended, and supported the smooth running of, an event.

^b National Volunteer Survey 2008

Last but by no means least thanks to the volunteers who worked with the Central Volunteering Team on the conferences (pre and post event) – Gary Banton, Adam Smith, Elizabeth Flew, Carol Weatherley, Hazel Deighton, Iris Keeble and Francis Sheppard.

6. Contact details

If you would like to be involved in the pieces of work mentioned in this document please contact the named member of staff.

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7. Additional documentation

This report draws on a number of sources of data generated at the conferences and elsewhere. It has been decided not to include all of these documents within the final report. Electronically, the file size could cause transmission problems while printing and posting so much paper will not be required by every conference delegate.

Additional documentation includes:-

Agenda	Summary of volunteer and staff evaluation forms	Conference DVD
Postcard comments	PM workshop – summary of findings from the afternoon workshops considering your volunteering experience	Questions & Answers

All of this additional documentation is available on the website at www.nationaltrust.org.uk/volunteering/conf08 or on request

Please remember to specify which document(s) you would like and how you would like to receive them; e.g. by e-mail or printed by post.

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