Shortly after I was hired as the Manager of Volunteer Services at Newfields, our Chief Financial Officer called me in for an update on my progress. I launched into detailed plans being vetted through key stakeholder meetings with current volunteers, staff, and community members. I laid out my action plan for the next year as well as a vision for the future of volunteerism based upon the institution’s strategic plan. I spoke about the successes in the short term as well as the hard, yet rewarding road that lay ahead. I explained with confidence how I felt we would continue to see immediate results based upon my initial findings. He looked me in the eye, and with one small sentence changed how we look at volunteerism: “prove it.”

I invested so much time in the proper planning and vetting of strategic plans for the volunteer program I had neglected to examine how I was going to showcase the successes and opportunities that arose. I think volunteer managers and directors have enormous expectations placed upon them to deliver a quality volunteer program, yet sometimes fail to take the time to set benchmarks for our programs that effectively communicate to our leaders the effectiveness of our programs. This simple, yet poignant challenge to prove it inspired me to dig deeper. I revisited my plan and began to reach outside of our local community of museums and volunteer leaders in Indianapolis. I sought out how other institutions view success within their own volunteer programs and how they track these quantitatively from year to year. I bring this ongoing search to you through the AAMV newsletter in the hope of beginning a dialogue about benchmarking and analyzing what it means to run a successful volunteer program.

I have definitely found an incredibly useful way to flex this muscle in my role as the Manager of Volunteer Services at Newfields. When someone says to prove it, I look to the numbers and see what they can tell us first and foremost. But which numbers? Numbers, tracked and untracked, are unique from institution to institution based upon current goals. I say current goals because your program focus most likely changes depending on the needs of the institution your volunteer program serves. I use the following key program indicators (KPIs) to help Newfields look at our volunteerism holistically: Total Number of Volunteers, Demographics, Engagement, Conversion Rate, Attrition Rate, Total Number of Volunteer Hours, Fill Rate, and Average Number of Hours Donated per Volunteer.

TOTAL NUMBER OF VOLUNTEERS: Most volunteer programs fixate on the total number of volunteers. Many think that increasing the number of volunteers is the easiest way to ensure having enough volunteers to fill all needs. I have always been more interested in engagement. I would rather have ten volunteers donate one hundred hours per year than one thousand donate ten hours. Engaged volunteers require less ongoing training and have a higher capacity for meaningful impact. Additionally, they are typically mission driven and dedicated to the cause on a deeper level. This can lead the way to donor stewardship and increased involvement such as future participation on governing boards and working committees.

DEMOGRAPHICS: Ensuring that your volunteer program is representative of the community your institution serves is very important. It is not enough to simply state that you welcome all. You must go out and seek the diversity you need and want for your volunteer program. Whether this means going door to door or being present at community fairs and festivals, you will need to actively seek out and provide information and access to diverse populations in your community if you wish for them to participate. Knowing where you stand by tracking this from year to year is the first step in this process and key to success in this area.
Figure 1: We work tirelessly to ensure we are being intentional about our recruiting efforts when it comes to diversity. The first step in that process is knowing what you have so that you can see progress when it is being made.

Figure 2: Newfields is located in Marion County so though this is no big surprise, how many volunteers we draw from surrounding counties is. This showcases the reach of our institution and how much we are drawing from all of Central Indiana.

Figure 3: Our median volunteer age has begun shifting to a younger, more diverse audience. This is a direct result of better and more diverse recruiting strategies.
**ENGAGEMENT:** I have found that many institutions measure engagement using different methods. I speak of engagement for Newfields in terms of how many activities our volunteers are participating in outside of their core volunteer activity. This includes participation in volunteer trainings, appreciation activities, and external recruiting activities. Tracking engagement can show you how effective your programs are towards supporting volunteers. For example, Newfields instituted several initiatives in the hopes we would be able to engage volunteers on a more regular basis: hosting semi-annual meetings as well as bimonthly volunteer mixers, which focused on providing an opportunity for volunteers to engage with one another in a social setting. Both activities had great aspirations. They might have been the right tools for another institution to increase volunteer communication and involvement; however, we found attendance almost instantly dropped off after several iterations of these initiatives. By collecting feedback from volunteers that attended and those that did not, we found that this was not what our volunteers wanted from our program. We took this feedback and used it to develop a new model for engagement that included an opportunity to mix and mingle before a seasonal training session with an appreciation component included. A presentation from the curator of the seasonal exhibition followed by specific training for volunteer and staff roles for the experience fit our volunteer population well.

We also included invitations to staff and volunteers for this very special training furthering the perceived value and importance of the session. The results were astoundingly positive. The results were astoundingly positive. Attendance increased 100% and has maintained from one season to the next. These results told us that we had found the right model for engagement and training volunteers at our institution.

**CONVERSION AND ATTRITION RATE:** I find that both of these statistics are very important to track, because they show evidence of how successfully volunteers move through the onboarding process. At the Newfields we track how many applications are received, how many we accept into the program (not all volunteer applicants are accepted into our program), how many of those individuals complete orientation, and how many start volunteering. Our attrition rate helps us see how many volunteers we lose on an annual basis regardless of the reason. It might make sense for other institutions to track the reasons for leaving. It is important to track attrition, especially if you see a large amount of turnover. This will help you understand whether or not there is an internal issue with your program or other external factors to consider.
TOTAL NUMBER OF VOLUNTEER HOURS DONATED: I have tracked this as a KPI for the past two years. Senior leadership previously challenged our program to increase the number of volunteer hours donated by four full time equivalents (FTEs) in each of the previous two years. An FTE is measured by the amount of hours we expect our full time employees to work in a given year. We are expected to work 37.5 hours per week which results in a total of 1,950 hours per year. This was my greatest challenge to date: shifting the expectations of our leadership from seeking a greater number of hours donated each year to what I consider the most important program indicators: Fill Rate & Average Number of Hours Donated Per Volunteer.

FILL RATE & AVERAGE NUMBER OF HOURS DONATED PER VOLUNTEER: I believe these are the two most important indicators of Newfields’ success at this time. We calculate the fill rate by tracking how many volunteer openings exist versus the total number of volunteers that fill those openings. For instance, if 85 volunteers sign up to fill 100 available openings, that would be an 85% fill rate. We look at this by individual volunteer assignments, departmentally, as well as through our new seasonal initiatives like the exhibitions: Orchids: Cultivating Beauty, Spring Blooms: Celebration of Color, and Winterlights at Newfields that have specific, short-term time frames with volunteer needs. The average number of hours donated per volunteer is calculated by taking the total number of hours donated by volunteers and dividing it by the total number of all volunteers that donated time.
FILL RATE & AVERAGE NUMBER OF HOURS DONATED PER VOLUNTEER (continued): These two figures are true indicators of how engaged your volunteer base is at the core. By balancing the right number of openings to support the institution’s needs on a daily basis with volunteer interest and available base to fill these openings, we provide a more meaningful experience for our volunteers. Ideally this will result in a highly active and engaged volunteer base that supports the institution’s needs at a higher capacity. A truly successful program has a good fill rate complimented by a high number of hours donated per volunteer annually.

![Average # of Hours/Volunteer](image1)

![Fill Rate Percentage](image2)

**Figure 7:** Tracking the average number of hours per volunteer shows how invested your volunteer base is. The fill rate is a direct measure of effectiveness that speaks volumes.

Using fill rate and the average number of hours per volunteer over total number of hours donated annually, helps board members and senior leadership understand why museums cannot use volunteers for everything. It also makes other staff members feel more secure in their jobs and not like they are being encroached upon by volunteers. These two metrics are very important.

**CONCLUSION:** Every institution is unique and will find their own best practices when it comes to analyzing their program and selecting which metric(s) to track. I like these particular metrics because they apply to both small and large institutions. At the end of the day, each organization needs to do what is best for them. Developing your plan and designing your benchmarks can help you see success in a different manner and ultimately help you tell the story of your program to key institutional stakeholders.

I continue to seek out other models for tracking success in other institutions. If you have something that works for you, I would love to hear about it! Please feel free to contact me at cmorehead@discovernewfields.org to continue this conversation or to learn more about how we track success at Newfields.

**Chris Morehead**  
*Manager of Volunteer Services*  
Newfields  
Indianapolis, IN

Volunteers at Newfields, The Indianapolis Museum of Art
From AAMV’s new President:

RELYING ON YOUR PROFESSIONAL NETWORK

I’ve been so fortunate through my involvement in AAMV to meet some truly remarkable colleagues in the volunteer management community (many of whom I now call friends) who have been a great sounding board, source of advice, and wisdom these last few months as I’ve undergone a pretty substantial professional transition. It really has reminded me of the value and virtues of our professional community for which I am incredibly grateful.

At the Museum of History and Holocaust Education, where I was the Education and Outreach Manager from August 2011 to August 2017, I managed 30-50 volunteers and interns in a traditional museum setting. We recruited, conducted trainings and evaluation, and appreciated our wonderful volunteers and after six years there I felt like I had gotten this volunteer manager thing down. If I ever needed a reminder that we should never stop learning or relying on the talents and skills of our talented colleagues in the museum management field and our professional network, it’s been in the last year as I’ve started a new job here at Historic Oakland Cemetery in Atlanta, GA.

After Labor Day 2017 I started a new job as the Director of Programming and Volunteers at the Historic Oakland Foundation which is the “friends” of Atlanta’s 167 year-old historic Oakland Cemetery. This city cemetery is as much an outdoor history museum that tells the city’s history through over 70,000 individual stories as it is an art museum with beautiful architecture and aesthetics (GQ called it an “outdoor sculpture garden”!) But what make’s Oakland tick is the nearly 200 incredibly dedicated volunteers. These passionate people from all over Atlanta do “official” volunteer jobs such as giving tours, working in the gardens, staffing the Visitor Center, helping out at events and programs as well as “less official” jobs such as making and donating items to be sold in the Visitor Center, bringing new groups and audiences to the Cemetery, and (literally) writing the book about Oakland. Since day one I’ve been blown away by the passion and energy of the Oakland volunteer “family” and it is no joke to say that some of these volunteers have been here since the Foundation was formed forty years ago with a mission to “preserve, restore, enhance, and share Oakland with the public.”

Also since day one, I’ve had to go back to basics in getting to know Oakland’s volunteers and also putting practices and procedures in place to manage and to continue to grow the volunteer corps. The Foundation is approaching a moment of change as we embark on a Capital Campaign and continue to move towards a more deliberate and professional organization from the almost completely volunteer-run organization it was less than ten years ago. And this has meant launching a volunteer handbook for the organization, recruiting and orienting forty new volunteers for all departments of the organization, and thinking critically about which elements of the volunteer program that my wonderful predecessor put in place can and should stay the same, which might need a little tinkering, and how might we make some changes with a volunteer corps that in many cases has been here for a very long time. Although we did launch a new handbook and have just hosted a very successful orientation for 45 new volunteers (I’d be happy to share our recruiting strategies with anyone who is interested) I can’t say that I have found many answers to these complex or multi-layered questions. What I’ve realized and had to remind myself is that it is important to return to the basics (including re-reading Transforming Museum Volunteering) to ensure strong foundations for a volunteer program, while also remembering that it is crucially important to turn to your professional colleagues as you explore changes and new ideas in your practice.

I’d often heard the advice offered that it is important to “use” your professional networks, yet I’m not sure I’d ever truly understood what this meant than in the last few months. I couldn’t have survived through this transition without many words of encouragement and support from those in the field. I hope that you will find equal amounts of inspiration, collegiality, and support through your membership of AAMV and come to value this essential professional organization as much as I do. I look forward to getting to know you and continuing to grow AAMV.

Richard Harker
President, AAMV
Director of Programming and Volunteers, Historic Oakland Foundation, Atlanta, GA