

**Society of American Archivists
Council Meeting
November 2-3, 2018
Chicago, Illinois**

**Action Item: Best Practices for Volunteers
(Prepared by Past President Tanya Zanish-Belcher)**

BACKGROUND

Best Practices for Volunteers is a set of suggested guidelines for archives institutions and organizations about the use of volunteers. It is a companion to [Best Practices for Internships as a Component of Graduate Archival Education](#), which is currently under review. The document was drafted by a subgroup of the SAA Council based on the Council's discussions in September 2013 and January 2014 and in response to member feedback.

As part of its regular review process, the Best Practices were shared with the SAA membership for comment and feedback on the SAA website. Comments were received through August 1, 2018. This draft was reviewed by past Council members Amy Cooper Cary and Tanya Zanish-Belcher and the Steering Committee of the Reference, Access, and Outreach Section (Rebecca Petersen May, chair):

https://saa.archivists.org/4DCGI/committees/Roles.html?Action=Show_Comm_Roles&CommCode=SAA**CSECT-RAO&Name=Officers&Status=Active&. The only comments received were editorial or format-related in nature.

DISCUSSION

During the initial review period, one individual commented on this document, suggesting that the document should mention the possibility of volunteers choosing to work in archives as a means to complete court-ordered community service. Language was added to reflect this possibility. Links to URLs were also checked and revised. The proposed revision follows. Additions appear in red and are underlined; deletions are struck through.

Best Practices for Volunteers in Archives

BACKGROUND

Best Practices for Volunteers is a set of suggested guidelines for archives institutions and organizations. Sections include Background; Recommendations; Examples of Acceptable Volunteer Arrangements; and Additional Resources. It is a companion to *Best Practices for Internships as a Component of Graduate Education*.

INTRODUCTION

Some 65 million people volunteer each year in the United States.¹ Volunteers may provide unpaid, charitable assistance to nonprofit cultural organizations or public institutions with responsibilities for archives. Individuals who volunteer their time and expertise provide important services that help further an organization's mission and ensure the survival of and access to our nation's heritage. Volunteers can be essential to community-based archives that help ensure the diversity of our historical record. There are community-based historical organizations whose doors would close without the support of local volunteers. In turn, voluntary service provides volunteers with valuable experiences and personal satisfaction. Volunteer opportunities help increase community involvement in and support for an organization and the archival enterprise. There are also online opportunities for volunteers to assist in increasing access to the archival record.

In the past five years, SAA members have voiced increasing concerns about the possible misuse of volunteers, especially of volunteer graduate students or new archives professionals. In lean economic times, some institutions might be tempted to turn to skilled but unpaid volunteers to get work accomplished. These best practices recognize that there is an important role for volunteers in the preservation, use, and appreciation of our cultural heritage, but also caution institutions against using volunteers as substitutes for the knowledgeable, skilled, and fairly compensated professional archivists. Volunteers must enhance, not depreciate, the value of professional archival work. Similarly, in a competitive job market, new professionals and graduate students may seek volunteer work to gain additional professional experience. In these situations, it may be more appropriate to define an internship and clarify expectations about learning outcomes.

Volunteers are distinct from interns. An internship is an educational experience designed to benefit the intern and is under the mentorship of a professional. SAA has also provided [*Best Practices for Internships as a Component of Graduate Archival Education*](#).² A volunteer offers service for a civic, charitable, **community**, religious, or humanitarian purpose without any promise or expectation of compensation or reward.

These guidelines are intended for institutions that employ archivists and also use volunteers. Some recommendations may not be applicable to smaller archives or historical societies that are sustained exclusively by volunteers.

RECOMMENDATIONS

For institutions that employ archivists but seek additional volunteer assistance, SAA recommends the following best practices:

1. Organizations should be aware of and follow all applicable labor laws, regulations, and bargaining agreements governing volunteer activities.³
2. Individuals may volunteer their services to public institutions or religious, charitable or similar non-profit organizations, "usually on a part-time basis, for public service, religious, or humanitarian objectives, **including mandated community service**." Individuals should not serve as volunteers for for-profit, private- sector institutions.⁴

3. Volunteers should not replace or displace paid employees.⁵ Volunteers should support and augment the work of paid employees.
4. Volunteers should volunteer their services freely, without pressure, coercion, or promise of compensation or future employment.
5. To ensure success, an institution should ensure that volunteers have adequate training and supervision, and have access to a designated staff member for questions. Volunteer work should be evaluated periodically by a designated staff member, and volunteers should receive feedback about their contributions.
6. Organizations should consider developing written policies and procedures for volunteers so they know what is expected of them. This documentation might include position descriptions, tasks and instructions, required qualifications, preferred schedules, and expected time commitments.⁶ Organizations should also consider keeping records about the number of volunteers and the number of hours contributed.
7. Organizations should provide a safe work environment for volunteers and ensure that volunteers are covered by their liability insurance.
8. Organizations should recruit, interview, and screen volunteers in equitable, nondiscriminatory ways that respect the diversity of their communities and ensure protection of their communities' historical assets. Volunteers and organizations should both ensure that their expectations about the volunteer experience are compatible.
9. An equitable procedure should be followed when a volunteer is asked to leave. Volunteers should have access to grievance procedures.
10. Organizations should strive to give volunteers a satisfying experience. An organization should consider ways to recognize or celebrate the important contributions of their volunteers.

EXAMPLES OF ACCEPTABLE VOLUNTEER ARRANGEMENTS

1. An individual volunteers his or her time, expertise, and services after a natural disaster to rescue historical materials.
2. An individual volunteers to assist with the archives of his or her local religious congregation.
3. An individual volunteers to assist a grassroots, community-based archive.
4. As a public service, an individual helps process an archival collection that might never be processed otherwise.
5. Under supervision, an individual performs a public service in assisting an archivist to complete a range of archival tasks.
6. An individual compiles an online catalog of archival resources in his or her area of interest and shares this reference resource with the public and staff at archival institutions.
7. An individual volunteers to help an organization increase its open hours for the public to access its collections.
8. An individual volunteers to microfilm records from an archival repository for his or her church.
9. An individual volunteers to conduct oral histories within his or her community.
10. An individual volunteers to serve on an archives' advisory board and offer his or her time and services in support of the archives' initiatives.

More acceptable examples are certainly possible.

FOR ADDITIONAL INFORMATION

“Resources for Volunteer Programs in Archives.” National Archives and Records Administration and the

Society of American Archivists (2012). Available at files.archivists.org/pubs/free/Resources_for_Volunteers-Final-V3.pdf. This publication contains valuable information and tools, but does not fully consider the ethical and legal contexts of volunteer activities.

“Standards and Best Practices for Museum Volunteer Programs in Museums,” American Association of Museum Volunteers. (Revised May 2012). Available at <https://aamv.wildapricot.org/Standards-and-Best-Practices>.

National Park Service Director’s Order #7: Volunteers in Parks
https://www.nps.gov/policy/DOrders/DO_7_2016.htm.

“Energ!ze Inc. Especially for Leaders of Volunteers,” RGK Center for Philanthropy and Community Service (University of Texas). Available at <https://www.energizeinc.com/>

“Volunteer Resource Management: What Is It and How Is It Done?” RGK Center for Philanthropy and Community Service. Available at <http://www.serviceleader.org/leaders>.

Herman, Melanie Lockwood, “Employee or Volunteer: What’s the Difference?” Nonprofit Risk Management Center. Available at <https://www.nonprofitrisk.org/resources/articles/volunteer-or-employee-do-you-know-the-difference/>.

“Need to Know Basics of Managing Volunteers.” Volunteer Maine: Maine Commission for Volunteer Service (2008). http://www.volunteermaine.org/shared_media/publications/old/E245B0A4d01.pdf.

“Best Practices for Volunteer Management Professionals,” Action Without Borders/Idealist.org. Available at <http://www.idealist.org/info/VolunteerMgmt/Best>.

¹ In the United States, about 64.5 million people (approximately 20% of the population) volunteered for an organization at least once between September 2011 and September 2012. For more information, see the Bureau of Labor Statistics report on “Volunteering in the United States in 2012” at <http://www.bls.gov/news.release/pdf/volun.pdf>.

² “Best Practices for Internships as a Component of Graduate Archival Education,” Society of American Archivists (2014). Available at <http://www2.archivists.org/standards/best-practices-for-internships-as-a-component-of-graduate-archival-education>

³ The U.S. Department of Labor has provided online resources to clarify the definition of volunteer work under the Fair Labor Standards Act (FLSA). See the U.S. Dept. of Labor, FLSA Advisor on Volunteers at <http://www.dol.gov/elaws/esa/flsa/docs/volunteers.asp>. Several opinions offered by the Wage and Hour Division provide further guidance, for example: “In determining whether a particular activity involves ‘ordinary volunteerism,’ the Department considers a variety of factors, including the nature of the entity receiving the services, the receipt by the worker (or expectation thereof) of any benefits from those for whom the services are performed, whether the activity is less than a full-time occupation, whether regular employees are displaced, whether the services are offered freely without pressure or coercion, and whether the services are of the kind typically associated with volunteer work.” (FLSA2001-18 at http://www.dol.gov/whd/opinion/FLSA/2001/2001_07_31_18_FLSA.htm)

³ State laws, institutional policies, and bargaining contracts may also apply to volunteer labor in certain contexts.

⁴ See the U.S. Dept. of Labor, FLSA Advisor on Volunteers at <http://www.dol.gov/elaws/esa/flsa/docs/volunteers.asp>.

⁵ See, for example, FLSA2002-9 at http://www.dol.gov/whd/opinion/FLSA/2002/2002_10_07_9_FLSA.htm: “The Wage and Hour Division has recognized that a person may volunteer time to religious, charitable, civic, humanitarian, or similar non-profit organizations as a public service and not be covered by the FLSA. Typically, such volunteers serve on a part-time basis and do not displace regular employed workers or perform work that would otherwise be performed by regular employees.”

⁶*Resources for Volunteer Programs in Archives*, compiled by the National Archives and Records Administration and published by SAA in 2012, provides some examples. See http://files.archivists.org/pubs/free/Resources_for_Volunteers-Final-V2.pdf.

RECOMMENDATION

THAT “Best Practices for Volunteers in Archives,” as revised, be approved.

Support Statement: “Best Practices for Volunteers in Archives” provides basic guidance for archives institutions and organizations about the use of volunteers to ensure a positive and productive experience for all parties involved. As a complement to “Best Practices for Internships as a Component of Graduate Archival Education” (currently under review), this document provides a necessary and appropriate context for volunteers as distinct from student interns and distinguishes the work of volunteers from that of paid staff.

Impact on Strategic Priorities: “Best Practices for Volunteers in Archives” assists in achieving portions of all four of SAA's Goals as stated in the 2014-2018 Strategic Plan. The clear statement that “volunteers should not replace or displace paid employees in the course of normal business” contributes to achievement of Goal 1 (“advocating for archives and archivists”). The guidelines were developed in response to member comments, notably those representing small organizations, thus contributing to Goal 4 (“meeting members' needs”). Issues of privilege have been prominent in the discussions noted above, particularly the realization that in many cases people experiencing various socio-economic circumstances cannot afford to volunteer to gain archival experience. The statement that “volunteers should not replace or displace paid employees” is a step toward addressing Strategy 4.3 (“Continue to enrich the association and the profession with greater diversity in membership....”).

Fiscal Impact: None.