

# **PRACTICAL GUIDE FOR THE ESTABLISHMENT AND OPERATION OF VOLUNTEER PROGRAMMES AT INSTITUTIONS**

## **abridged English version**

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**BEFEKTETÉS A JÖVŐBE**

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## Introduction

**“It is one of the beautiful compensations of life that no man can sincerely try to help another without helping himself.” (Ralph Waldo Emerson)**

The Practical Guide was created so that any cultural institution can quickly and easily find answers to practical questions regarding volunteering, the employment of volunteers, and the organisation of volunteer activities.

Volunteering at cultural institutions raises issues like responsibility, trust, and professionalism. It also opens up new opportunities—especially at a time when state subsidies are restructured and sometimes reduced, after which it becomes more important to build knowledge and manage resources in new ways.

Volunteers can contribute in many ways to increase the number of programmes and improve the quality of services by providing human resources to everyday operations. They may also play a significant role in sustaining the organisation or even stabilising its operation.

Volunteers’ involvement must be decided in accordance with local and organisational customs, and the manager’s and the proprietor’s intentions. The framework must be established and maintained accordingly, as the proprietor or the organisation has at least four options:

- They can establish their own volunteer programme and integrate volunteers into the organisation,
- They can receive volunteers indirectly, through a non-governmental organisation (this is not discussed in the present abridged Guide),
- They open themselves to volunteers, but due to a lack of capacity cannot get involved in either organising or receiving them; however, they may lobby for the establishment of a volunteer recipient organisation,
- They don’t receive volunteers.

Whichever option an organisation chooses, we believe that this Guide will provide answers and inspiration in specific areas, in difficult situations and issues.

It is important to realise that volunteering carries a great potential for the growth of the individual as well. Key competences required for lifelong learning include social and civic competence, which several EU and Hungarian documents<sup>1</sup> aimed to improve.

The Guide has been compiled by professionals with extensive practical experience in this field: they coordinate volunteers, teach volunteer management, and research and publish papers in this topic.

We hope that the practical approach of the Guide and the brief and focused description of best practices will inspire you and help to create and maintain a professionally operated volunteer programme. We wish you all the best for this project.

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<sup>1</sup> 2006/962/EC Recommendation 2006; National Core Curriculum

# 1. About volunteering in general – Concepts and a historical overview

## 1.1. What is volunteering?

This Guide defines volunteering—in line with the currently accepted Hungarian and foreign definitions—as human activity that is performed:

- Without financial consideration,
- Outside of a close circle of friends or family,
- Voluntarily, of one's own free will,
- For the benefit of the public.

## 1.2. The situation in Hungary; the case for volunteering

The self-organised communities and associations (book circles, student clubs) that appeared at the end of the 18<sup>th</sup> century, inspired by the ideas of the Enlightenment, can be seen as the predecessors of volunteering as we know it today. Without state regulation in the Reform Era, these organisations, a special form of self-determination, and the integration of reform ideas, spread quickly. Between the world wars, there were over 14 thousand associations active in such diverse areas as culture, sports, interest protection and youth organisations. The dictatorial rule established after 1947 gradually eliminated, and by the late 1950s practically eradicated, all forms of self-organisation. Non-governmental organisations could be established again right before the political transition of 1989. The UN declared the year 2001 the International Year of Volunteers, which started a conscious reflection on the development of volunteering. In 2002, Volunteering Hungary – Centre of Social Innovation (ÖKA) was established with the aim to promote the comprehensive development of volunteering in Hungary. Three years later Act LXXXVIII of 2005 on volunteer activities carried out in the public interest was enacted, which still regulates volunteer activities today. In 2006, ÖKA published the Development Strategy for Volunteering in Hungary 2007 – 2017<sup>2</sup>, a document that provided a comprehensive overview of the development tasks in this area.

### 1.2.1. Volunteer activities in Hungary according to statistical data

- The Hungarian Central Statistical Office (KSH) has studied volunteer activities in Hungary twice. In 2014, as in 2011, a significant part of the Hungarian adult population—over one third, approx. 2.55 million people—performed volunteer activities. According to the survey, the **typical Hungarian volunteer** is a married woman between 45 and 49, a university graduate, employed, who lives in a small village or town, and mostly does volunteer work informally. The main motivations are helping others and a sense of moral obligation. In Hungary, in 2014, the value of the volunteer activities performed by 2 million 557 thousand people was estimated at HUF 358 billion.

### 1.2.2. Why is volunteer management necessary?

The KSH data on demotivation are a great argument in favour of volunteer management. They show that the main excuse of those who refused to take part in volunteer activities was that “no-one asked for

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<sup>2</sup> <http://www.kicsiprec.hu/cikkek/az-oenkentessseg-fejlesztésenek-strategiaja-hazankban-0>

such help, and there was no person or cause for which they could volunteer.” This means there are unexploited areas in volunteer management in the external communication strategy of the organisations.

Among other authors, it was Klára Czike and Éva Kuti who, in their 2006 study<sup>3</sup>, discussed the need for volunteer management, created a comprehensive strategic plan for volunteers and volunteering, and made recommendations to the Hungarian government, defining goals, including:

- The integration of volunteering into public institutions is a priority objective
- The encouragement of volunteering through fostering the flow of information
- Linking volunteers with organisations

### **1.2.3. Volunteer work at institutions<sup>4</sup>**

According to Act LXXXVIII of 2005 on volunteer activities carried out in the public interest, “*in addition to non-governmental organisations, budgetary institutions are also allowed to receive volunteers. When it comes to volunteer work at institutions, care should be taken that volunteers should not do the same work as paid employees<sup>5</sup>.*”

In 2016, in the database of organisations providing volunteer activities carried out in the public interest, the registered Hungarian volunteer recipient organisations<sup>6</sup> in the cultural and community fields were as follows: 32 museums, 101 public education institutions, 7 public libraries, 278 local governments, 46 budgetary institutions, and 1,514 public benefit organisations. Most of the latter are foundations or non-profit business associations attached to organisations, established to support the performance of specialist tasks.

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<sup>3</sup> Czike – Kuti 2006 pp. 66–69

<sup>4</sup> Arapovics 2015 pp. 25–47

<sup>5</sup> Arapovics 2015 p. 32

<sup>6</sup> <http://civil.info.hu/onkentesseg>

## 2. Creating strategy

### 2.1. The need for a volunteer programme and creating strategy

Receiving volunteers means transparency for the organisations, as volunteers see what is behind the scenes, obtaining much more information about the organisation, internal relations and difficulties than the target audience of the organisation.

#### 2.1.1. Organisational benefits – Drawbacks<sup>7</sup>

Let's take a look at the main benefits and drawbacks for the organisation that usually occur when a volunteer programme is launched. Since the institutions concerned provide services, all layers of the organisation need to be considered: the institution itself, the staff, and the clients of the institution. To present the difficulties they may experience, at the end of the table is a non-exhaustive list of the aspects of volunteers.

Institution	
☺	☹
<ul style="list-style-type: none"> <li>- easing the burden of the staff</li> <li>- positive social message</li> <li>- improving the image of the institution</li> <li>- increasing number and improving quality of services (which may lead to an increase in prices or new sources of revenue)</li> <li>- hard-working and motivated additional staff</li> <li>- additional knowledge in the organisation</li> <li>- extending the organisation's network of contacts</li> <li>- the client-focussed approach of the organisation improves</li> </ul>	<ul style="list-style-type: none"> <li>- legal responsibility</li> <li>- fear of the unknown</li> <li>- mistrust of strangers</li> <li>- administrative burden</li> <li>- potential unreliability</li> <li>- lack of space and infrastructure</li> <li>- source of conflict (organisation within the organisation)</li> <li>- it may seem that volunteers can substitute the employees, but in fact they only assist them</li> </ul>
Employees	
☺	☹
<ul style="list-style-type: none"> <li>- enough staff to perform tasks</li> <li>- enthusiastic volunteers increase the enthusiasm of employees</li> <li>- new and dormant projects can be implemented</li> <li>- new inspiration and energy</li> </ul>	<ul style="list-style-type: none"> <li>- fear of losing position and job</li> <li>- fear of the uncertain</li> <li>- training and monitoring is time-consuming ("I'll do it myself")</li> <li>- continuous need for control</li> <li>- volunteers have new expectations</li> </ul>
Clients / visitors	
☺	☹
<ul style="list-style-type: none"> <li>- they get more attention and information</li> <li>- they get more services for the same price</li> <li>- warm reception and continuous enthusiasm</li> <li>- more patience</li> <li>- potentially better foreign language skills</li> </ul>	<ul style="list-style-type: none"> <li>- deficient or misleading information</li> <li>- lack of competence</li> <li>- less information</li> <li>- less trust</li> </ul>
Volunteers	
☺	☹

<sup>7</sup> Csordás 2012 pp. 90–91

<ul style="list-style-type: none"> <li>- gaining new knowledge and work experience in an organised setting</li> <li>- opportunity for job seeking and for extending network of contacts</li> <li>- becoming an active member of a community</li> <li>- acknowledgement and success</li> <li>- free programmes</li> <li>- leisure time spent usefully</li> </ul>	<ul style="list-style-type: none"> <li>- unequal treatment (not treated as a partner)</li> <li>- staff's competitive behaviour with volunteers</li> <li>- lack of understanding of organisational processes and decisions</li> </ul>
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It is important to state that when volunteers are received at an organisation, it triggers development and change. This is why organisational development should be thought over consciously. Think of volunteers as a group of clients who are closest to and—in some aspects—are part of the organisation. They provide a kind of gateway between the internal and the external world. Their integration obviously triggers a process of opening up.

Determining the place of the volunteer programme in the organisational structure is an important strategic question. On the one hand, to ensure maximum usefulness and efficiency, the volunteer coordinator should be active in the management of the institution. On the other hand, the level in the organisational structure that best suits the size of the coordinated team must be found for the best results.

### **2.1.2. Volunteer Programme Strategy**

When a new volunteer programme is launched, it is a significant challenge for both the coordinator and the organisation that the activities of paid employees and volunteers need to be coordinated, and an inclusive environment needs to be established. This is supported by the elements of the volunteer model, and the way these elements are developed.

It is best to re-evaluate the strategy from time to time to incorporate experiences so that the volunteer programme and the organisation can grow together organically.

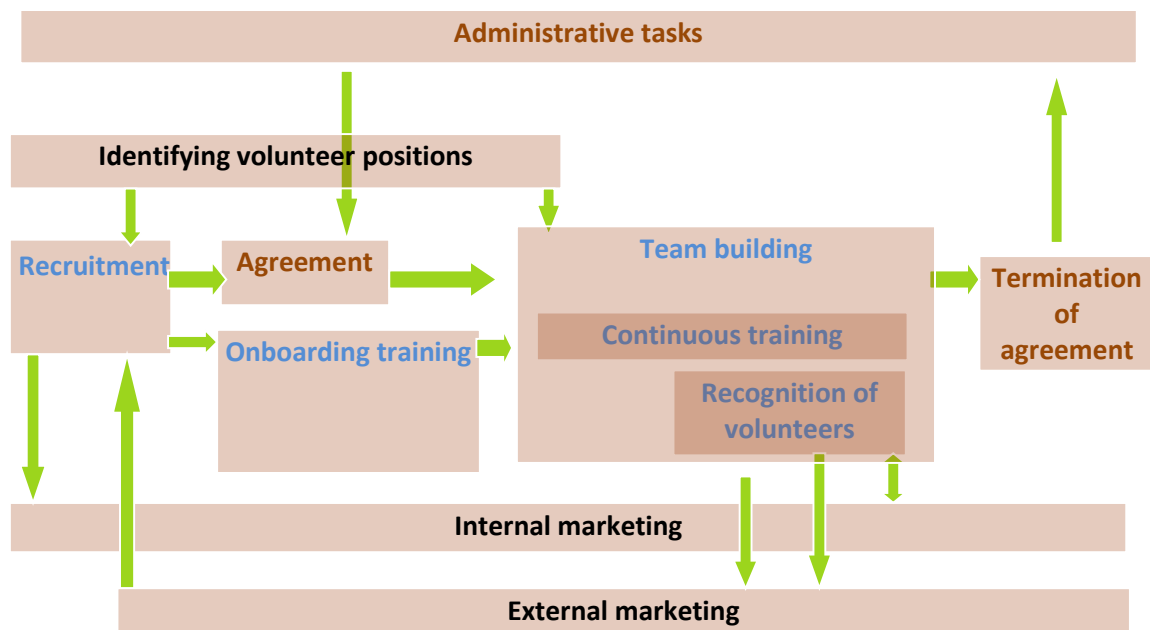
### **2.1.3. Volunteer management model**

In addition to creating a strategy, it is important to get to know the main areas of volunteer management. We will discuss one model here.<sup>8</sup>

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<sup>8</sup> Csordás 2016.





## 2.2. What happens when volunteers are received

Once an organisation has decided to launch a volunteer programme, in addition to ensuring compliance with legal regulations, it needs to make decisions about the coordinator, the position, and the working hours, and it also needs to think carefully about volunteer activities.

### 2.2.1. Capacities – Do you need a volunteer coordinator?

If you have the opportunity, you should definitely have a volunteer coordinator in your institution, even if it is not possible or necessary to have a full-time position for this. The volunteer coordinator has diverse tasks. They are a bridge between the volunteers and the staff of the institution, and between the volunteers and the management of the institution.

The following aspects may help decide whether or not to have a volunteer. There are two ways to approach the time and energy spent on coordinating volunteers and the resources needed to operate the programme, which can be expressed in salaries as follows:

A) The aim of the organisation is to improve cost-effectiveness, i.e. to improve the efficiency of operation with as low a budget as possible. The salary paid to the coordinator, expressed in working hours, can be equal to the hours worked by several paid employees. The question is whether the organisation is willing to spend money on the position of the volunteer coordinator—which we definitely recommend.

B) If the answer to the previous question is yes, the volunteer coordinator's working hours need to be decided. Based on the experience of organisations, depending on the activities of the volunteers we recommend using the following numbers as a rule of thumb—adding, of course, that there are many additional factors affecting the situation:

- 0–10 volunteers – This usually means 10 hours of work per week at most.

- 10–30 volunteers – Keeping in contact with the volunteers and other tasks of the volunteer coordinator may easily call for a part-time position.
- 30–50 volunteers – At least one part-time volunteer coordinator is necessary to operate the programme at a satisfactory level.
- 50–80 volunteers – Coordinating such a large number of volunteers is time-consuming. It may easily consume an employee's full working time to perform all related tasks.
- 80–100 volunteers – The full-time coordinator probably needs assistance and help in such a programme.
- over 100 volunteers – In such a volunteer programme with regular volunteer activities require at least to coordinators who are familiar with the area.

In institutions with a smaller staff it is difficult to create and fund such a position. When a new programme is launched, you should build it slowly. Yet it is important that you take it seriously when there are signs that the coordinator is potentially overworked. Just think about it: They manage a whole (or small) army sometimes.

### **2.3. Volunteer activities**

In case of volunteering in institutions and volunteering related to public services, the following factors have a significant influence on volunteer activities:

- level of regulation of the services,
- indispensability of professional knowledge,
- professional and administrative requirements,
- hierarchical organisational structure.

Here are some examples of the fields where Hungarian institutions have successfully engaged volunteers: information desk/service, exhibition tours, communication and marketing tasks (writing blogs, articles, identity design, event photography, video recording of events, making short videos, designing publicity materials), museum guard tasks.

When the activities and responsibilities of volunteers are defined at the start of the programme, it is best to offer at least 2-3 different positions, as this means more opportunities for the volunteer and also provides opportunity for change and development.

The institution should create a plan for unique and specific activities so that positions can be defined. In this you can record the amount of work to be done, which determines the number of professionals and volunteers needed for the project.

### **2.4. Internal and external communication of the organisation**

Since it is cooperation between people, a volunteer programme is based on effective internal communication. It is important that everyone involved is familiar with—and knows the goals and results of—the organisation, so that they can identify their place and appropriate function in the organisation. The people involved (paid and unpaid staff) keep in contact through internal communication: they know who does what, why and how, and how they can connect to the activities of others.

External communication is the indicator of the volunteer programme's assessment, acceptance and integration into the organisation, and it shapes the assessment and image of the organisation, as well as its integration into society.

In the long term both are crucial for the optimal operation of the organisation.

#### **Internal communication**

The tools of internal communication are like a conductor's baton—they help the elements of the organisation to operate with a single focus. Internal communication may serve several purposes in volunteer programmes as well. It is important that it should ensure the effective flow of information within the organisation.

It matters which sets of data are circulated from those generated in the volunteer programme, and how often. The job of volunteer coordinators mostly involves internal communication, as they frequently have to discuss issues with volunteers and the staff of the institution.

*Tip: Internal communication with volunteers should be age-appropriate. Volunteers from the X, Y, and Z generations prefer different channels of communication. In the Szenna Open-Air Museum, all the volunteers joined a closed Facebook group managed by the volunteer coordinator. Volunteers get information about the possible tasks through this channel, and photos of the events and other information are also collected there.*

## External communication

External communication makes the fabric of social acceptance and integration into society, which are increasingly important for organisations, stronger and more secure.

There are four main reasons you may want to use external communication regarding the volunteer programme:

- You want to reach out to potential volunteers
- You publish the results achieved with the volunteers to enhance the image of the organisation
- You promote volunteering itself
- You create an audience for the additional services provided by volunteers.

If you have the capacity and inclination, you can devise a communication plan, ideally integrated into the communication strategy of the institution. Don't forget that you are not alone in the communication space. You have to get your message across amongst considerable media noise, so you should consider using creative, unconventional ideas, and, if possible, rely on (pro bono) advice or support from experts in the field.

## 2.5. Launching a new programme

The launch of a new volunteer programme has several stages. There are two basic situations here. First, when the organisation has not worked with volunteers in an organised setting, and the volunteer programme itself and the fact that volunteers are received is new for the organisation. In this case preparation, getting the organisation ready for receiving volunteers is crucial. Another situation is when the organisation has already been working with volunteers but wants to involve them and use their activities in a new area.

The order of the steps described below may change. We recommend that you get an overview of the whole process before you start planning and consider the following guide.

Steps to launching a volunteer programme:

1. **The idea** – Collecting arguments for and against (organisational benefits and counter-arguments), gathering experience
2. **Needs – Internal survey**, Winning over top management, obtaining the required authorisations, clarifying the conditions and start date of the activities
3. **Terms of reference** – Exactly what tasks will be performed by the volunteers and in what framework?
4. **Integration into the organisation** – Which organisational unit and who will volunteers be coordinated by?

5. **Budget** – What additional value is generated by the activities for the “clients” of the organisation and, therefore, for the organisation? What does receiving volunteers entail?
6. **Administrative tasks** – What is the framework of, and what rules apply to, receiving volunteers?
7. **Recruitment and selection** – Documents for advertising volunteer positions, recruitment plan
8. **Security issues** – What implications does receiving volunteers have in terms of security?
9. **Training** – Preparing the selected volunteers for the task.
10. **Launching the volunteer activities** – Who will perform volunteer activities, when and where? Is all necessary equipment, such as tables, chairs, etc. available?

To sum up, these four issues must be discussed: are the processes, people, documents and equipment ready to receive the volunteers?

Since preparations involve diverse tasks and require meticulous and careful work so that there will be nothing about the volunteer activities (and, in case of a new programme, the volunteers themselves) that can be criticised in the future, you should allocate enough time to consider every detail of the implementation of a new programme.

## 3. Administrative tasks

### 3.1. Volunteer Handbook – Operational concepts

The Volunteer Handbook is a key document. It serves as the organisational and operational rules of the volunteer programme at the institution. It contains all the information and rules regarding the conditions of volunteer work at the institution and the rights and obligations of the volunteers. The size of the Handbook may vary according to the size and type of the institution (5–50 pages), but it is important that every institution should have such a document. Every volunteer and every employee of the institution should be familiar with the contents of the Handbook. It is important to note that the contents of the Handbook, and the volunteer strategy itself, can be modified.

Rules that apply to volunteers in general are laid down in the **volunteer handbook**, and individual agreements are included in the **volunteer agreement**.

### 3.2. Challenges and opportunities of administrative tasks

Administrative tasks are a nuisance, a great burden to many people, something they would like to avoid. This is mostly because it is mandatory and requires careful and meticulous work. We would like to point out, however, that there is power in numbers, which you can use well, and without them it is difficult to see or show the legitimacy of the programme.

The advantages of administrative tasks include giving an accurate and understandable picture of volunteer work (working hours, their value expressed in monetary terms), providing data for the annual report of the organisation, adding to the history of the organisation and creating the history of the volunteer programme, serving as a statistical basis that can be used in planning, being a creative source when, for example, a skills table is compiled, and ensuring traceability.

Administrative tasks, no doubt, take a lot of time, so we recommend that you always look for new available techniques.

#### 3.2.1. What needs to be recorded?

For record-keeping, it is important that every institution have at least the following databases.

- **Volunteer database:** A detailed list of all the volunteers in the institution.
- **Schedule of the volunteers:** Tracking the daily schedule of volunteers is of utmost importance for effective operation.
- **Statistics:** Several statistics may be kept regarding volunteer work (e.g. number of volunteer work hours, age of volunteers, etc.) but the number of volunteer work hours must be recorded at every institution. For this, you can first and foremost rely on attendance sheets. Other records may include: a database of people who participated in volunteer training; a database of rewards given to volunteers; special skills of volunteers, etc.

### 3.3. Budget of the volunteer programme

One of the most common misconceptions regarding volunteers is that volunteer work is free. This is not true. Nor is it true that considerations and preparations only have to be made at the time of receiving the volunteers, and the programme or the volunteers will take care of themselves after that.

Having become familiar with the operation of many organisations, we can say that a volunteer programme is an investment that generates additional workforce, and, if managed well, it can be shown to be worth the effort—that is, if the organisation spends time and energy (money) on it.

With this in mind, let's take a look at the potential expenses and revenues (or advantages) when an organisation receives volunteers.

Revenues	Quantification
Extra working hours	It can mostly be expressed in hours of work, based on attendance sheets. If you calculate with the prorated national standard or the minimum wage, you will not overestimate the value of volunteer work.
Additional services	If there is a service the organisation can provide because volunteers, as an additional workforce, made it possible—and there is a charge applying to this service or a donation option (e.g. a collection box)—such revenues can be attributed to the volunteer programme.
Returning clients	Changes experienced by the organisation—e.g. an increase in the number of visitors or returning visitors, etc.—that happen directly after and as a result of the start of a volunteer programme should be monitored, and even if they cannot be directly attributed to the volunteer programme as their root cause, some of these changes will definitely confirm that volunteers are needed.
Grants received	A volunteer programme is often an advantage when grant applications are evaluated, and grants are often available specifically for volunteer programmes (Lifelong Learning grants or those from the EU). Funds raised this way are a great contribution to the operational costs of the institution.
Donations	When they see the limited resources of the organisation, volunteers sometimes donate equipment necessary for daily operation. This is another positive effect of the programme.

Expenses	Quantification
Salary of the volunteer coordinator	If they work part-time coordinating volunteers, the salary can be prorated.
Payment of expenses	<b>The expenses of volunteers can be paid according to legal regulations</b> , but this may be limited by the institution's resources. The following may be included: <ul style="list-style-type: none"> <li>❖ working clothes, protective equipment and materials,</li> <li>❖ providing transport, accommodation and meals required for the performance of the tasks,</li> <li>❖ costs of non-formal training,</li> <li>❖ daily allowance for volunteer activities carried out in the public interest when staying abroad.</li> </ul>
Rewards	It is best to keep records of the rewards given to volunteers in the course of the year (it is also required by law). These include free attendance, tickets, books, and everything else. Consider the taxation issues set out in the relevant legislation.
Equipment	Here you can list everything needed for the employment of volunteers.
Communication	The cost of using materials and channels to promote the volunteer programme and publish advertisements, possibly material costs.
Programmes and training	Organising lectures, hospitality costs, etc.

It is worth planning the annual budget of the programme in advance, so the head of finances can calculate with it, and annual accounts should also be prepared at the end of the year. The figures you get this way are useful input for organisational planning and grant applications (you can present data) and the annual report. You can also issue a positive press release (e.g. from the hours and the value of the volunteer work received).

## 4. HR processes – The volunteer career path

The integration of the volunteer into the organisation, the time they spend and the activities they perform at the organisation before they leave is called the volunteer career path. In the following sections we will take a look at the stages of this path, mostly from the aspect of the volunteer coordinator.

It should be noted that there are as many possible career paths as there are volunteers and organisations. You should consider that the commitment of volunteers increases over time. New volunteers can perform different tasks than those who have worked there for years and know the institution well.

### 4.1. Participants of the volunteer programme

A volunteer programme has at least two participants: the volunteer and at least one employee of the organisation. Who else can we rely on and in what capacity? What do we call these people, and what activities do they perform?

#### 4.1.1. Volunteers

**Volunteers** are people who actively help, have signed an agreement with the organisation, comply with legal regulations, and provide volunteer work to the organisation.

Like in paid employment, there may be breaks in volunteer work. This is why you should differentiate between *active* and *passive volunteers*.

#### 4.1.2. Volunteer coordinators and professional coordinators

If there are many volunteers or the paid staff is small, managing volunteers is a great challenge for the organisation. It is worth employing one person, either full-time or part-time, depending on the number of volunteers, as a **volunteer coordinator**. If it is a large organisation with volunteers in several areas, and there are different employees coordinating their daily activities, we can call them **professional coordinators** or mentors. For the sake of clarity, paid employees who coordinate the work of volunteers are called professional coordinators.

#### 4.1.3. Mentors

Coordinators themselves may turn to the volunteers for help in onboarding new volunteers, managing daily tasks, and preparing activities. Volunteers who provide assistance to the coordinator in training new volunteers are called **mentors**.

### 4.2. Volunteer recruitment

For many organisations, recruiting volunteers may seem like a great challenge. Yet with systematic planning you have a good chance of finding the right people who can help your organisation. Before you start recruitment, you should consider some issues. Here is some advice:<sup>9</sup>

- ❖ Only start recruiting when you are ready:
  - You have decided to launch the programme.

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<sup>9</sup> Ellis, 2016



- You have decided in which areas you will receive volunteers.
- You know when the activities will start.
- You know how you will select and train volunteers.
- ❖ Plan the stages and possibilities of recruitment, break it down to small campaigns as follows, in this order:
  1. **Define the ideal candidate**
  2. **Create the advertisement.**
  3. **Brainstorm about where you are most likely to find the right candidate.**
  4. **Match the recruitment method with the advertising materials and the recruitment channel.**
  5. Use the **organisation's website** and advertise volunteer positions at the vacancies section.
  6. **Have an ad published.** Prepare for receiving prospective volunteers and for conducting interviews.

For a successful recruitment plan, you also need a good schedule. It is best to plan 2-3 weeks for receiving applications, and another 1-2 weeks for screening them. This means that unless there is a lengthy training, you should advertise the volunteer position 4-5 weeks before you plan to start the programme.

### 4.3. Volunteer selection

Focus on your primary task, selection: to find the best candidates, have a carefully compiled list of interview questions, avoid the situation—typical in cultural and non-governmental organisations—when an interview turns simply into a pleasant discussion.

The number, type and content of the questions obviously depend on the position you are advertising. When you write the questions, the description of the ideal candidate and the list of the required skills may help.

#### 4.3.1. Assessing the motivation of the volunteers

During the interview you can ask why the candidate would like to do volunteer work. If you have asked for a motivational letter, it serves the same purpose: you can learn about the motivation of the candidates and about why they want to do volunteer activities at your institution.

It is important to underline, however, that whatever their motivation, you should value all volunteers equally. Initial motivation often changes over time.

There is a large body of literature on the motivations of volunteering, and different studies defined different categories. In addition to the results of Bartal–Kmetty, which we introduced at the beginning of the chapter, in this Guide we only present a basic motivational table<sup>10</sup> below, which presents motivations in a simplified but easy-to-understand way.

	Traditional volunteering (or input-oriented volunteering <sup>11</sup> )	New volunteering (or output-oriented volunteering)
Motivation	Getting back into / becoming part of a community Belonging somewhere The feeling that you can help	Acquiring new, necessary skills References Professional development

<sup>10</sup> Czike – Kuti 2006 p. 27

<sup>11</sup> Csordás 2012



	Family tradition Altruistic attitude (it is good to give)	Self-knowledge Spending your leisure time in a useful way Potential advantages and benefits of volunteer work Networking Possibly finding a job
Characteristics	Mostly older people	Mostly younger people

We can see that members of younger generations change positions more easily and are more hesitant to commit themselves in the long term. This is also an age-specific feature, as their main tasks in life are to choose an occupation and start a family. They are in a phase when they are building. Members of older generations are more likely to commit themselves. If they like a place they stay there for a long time, which is, again, understandable if we consider their age and situation, since what they want to achieve is fulfilment, a high level of integration of their personality, and passing on their experience.

As Bartal–Kmetty<sup>12</sup> said in their study, the approach to volunteering is also changing: *“in an increasingly obvious way, it is visible in two age groups: the so-called ‘revolving door’ volunteering for younger people and the ‘finding new goals’ attitude among retired people. New and differentiated volunteer management methods are needed if organisations want to attract and retain these two generations properly.”* However, according to the study, in the long term it is essential for the motivation of volunteers that the joy caused by volunteering should be sustained and that a community should develop. Don’t forget: Certain motivational factors may become stronger or weaker over time.

## 4.4. Onboarding training

In the public sector, few organisations monitor the integration and the professional and personal competences of employees. Still, this, too, is an investment in human capital. For this reason, it is important to provide onboarding training to volunteers.

The aim of the onboarding training is to provide an overview of the organisation’s activities and clearly define the tasks and limitations of the position. It also provides targeted knowledge and skills development, basic knowledge about the organisational structure and the organisational units important to its activities, and an opportunity for paid and unpaid staff to get to know one another. The training also develops closer links between the volunteers and the organisation, and enhances commitment.

### 4.4.1. Shall we train our volunteers?

When you try to answer this question, what you are really trying to decide is whether you want to have a solid foundation for the relationship between the organisation and the volunteers. In this case, you obviously make decisions about the time of the coordinator and other staff members as well. In a well-functioning, professional programme there is definitely some kind of onboarding training.

### 4.4.2. What methods and content should you have in such a training?

First of all, you need to see what knowledge, qualifications and work experience the volunteers have, and in what areas their theoretical knowledge or practical skills should be improved.

You can assign methods to the goals and content elements.

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<sup>12</sup> Bartal – Kmetty 2011 pp. 7–30

*Tip: In the volunteer programme of the Museum of Fine Arts, there is great emphasis on how volunteers are introduced to the organisation and the activities.*

*Hands On training: The museum adapted the Hands On programme of the British Museum and the Manchester Museum, in cooperation with the Egyptologists of the Museum of Fine Arts, after a long, approx. 6-month planning period. There was a lecture and a discussion about restoration, 6 lectures on Egyptology, a walk-through of the museum with a focus on security and local knowledge from a new aspect, and the training also included a museum education workshop. The programme was followed by exams. Volunteers participated in role-play activities with authentic objects and real-life situations before an examination board.*

Below we will provide a non-exhaustive list of methods for general and professional onboarding, training and development.

#### **General training elements:**

- Introduction to cultural institutions (information specific to libraries, museums, public education or other institutions, and community spaces)
- General information training or quiz
- A tour of the organisation
- (Exhibition) tours
- Team building, teamwork improvement training, with self-knowledge training included
- Fire and health and safety education

#### **Professional training elements:**

- Communication training
- Cultural management training
- Techniques for presentations and exhibition tours
- Project management training
- Classification techniques (in libraries)
- Workshops and training by area

#### **4.4.3. What can you develop through training?**

The knowledge, skills and attitudes of volunteers may improve as they take part in various training modules. In general, we can say their communication skills improve, their self-knowledge develops, and they become more aware of their motivations. They learn the basics of the tasks they will have, they acquire the skills to use this knowledge in practice, and their cooperative skills improve. They become familiar with the basic principles of social responsibility, civic participation and community work.

#### **4.4.4. Exams?**

It is up to the institution whether it organises an exam for volunteers who took part in the onboarding training. We recommend that institutions assess progress towards their training goals, with e.g. a test, a questionnaire or quiz after the training or, in case of museums, after 3-4 exhibition tour practice sessions, volunteers should do an exhibition tour on their own. It is important to inform the volunteers about the process and outcome of the onboarding and training in advance, and it is also important that volunteers decide freely to complete the training in order to perform volunteer activities at a high level.

At this point you should consider the benefits of an exam:

- It may encourage volunteers to study harder and deepen their knowledge
- It provides feedback about the knowledge of the student (pass/fail or other categories)
- It provides an opportunity for volunteers to compare themselves to others
- Initiation – volunteers formally become members of the team
- Confirmation that the knowledge of others was also “satisfactory”, so they become members of a high quality team.

## 4.5. Assessment, tests

In volunteer activities, you should try to define tasks clearly and unambiguously, as described above, since we believe it contributes to efficiency. However, to maintain the motivation and enthusiasm of volunteers, it is crucial that you give feedback on the tasks performed—whether or not they were flawless. Volunteer activities may be evaluated for several reasons.

1. to provide feedback on the tasks performed, to convey the comments of the management, staff and visitors
2. to improve future performance with, potentially, a need for re-planning and modifications
3. to develop a closer link between the volunteer and the organisation through mutual communication
4. to look back on and celebrate the results of a certain period (e.g. annual appraisal)
5. to sort the information, facts and statistics available regarding the programme.

When feedback is provided on difficult situations, many tools can be used, and, at this point, the self-knowledge of the coordinator is crucial. We describe three tools below, all of which require practice and many attempts.

### Assertiveness

In assertive communication, you communicate the interests of the organisation without hurting the interest of the other party (the volunteer). In other words, you strive to establish cooperation—a partnership, a win-win situation—while you stand up for yourself (your organisation).

While doing so, you can understand the difficult circumstances and situation of the other party, but you can tell them that, for example, after the third critical error you can't accept more mistakes like that and you would like to find a different solution.

One of the basic principles of assertive communication is that it is not the other party that is labelled but your own experience, and you formulate requests or make decisions about that.

### Nonviolent communication

Nonviolent communication takes facts and approaches situations from emotions and needs. Its basic tenet is that you should only use it if your aim is to maintain the relationship. Another basic principle is that every person is responsible for the feelings stemming from their needs. This way, you can avoid blaming the other party and find creative solutions in certain situations that may be based either on changing your position or on a request towards the other party or another party.

The basic assumption of this model is that there is a difference between objective reality and reality as you perceive it; moreover, your perceptions can trigger different feelings, depending on what you need at a given moment. One of the main aims of nonviolent communication is to achieve understanding and to identify the actions needed for meeting needs.

### Mentoring conversation<sup>13</sup>

*“The mentoring conversation is consciously structured; it is an opportunity to support the growth of the volunteer, and it usually covers the following questions:*

- ❖ *How do you feel in the organisation? (getting in tune)*
- ❖ *You refer back to previous conversations that are somehow connected to this period.*
- ❖ *You evaluate tasks from a qualitative and quantitative aspect (both parties). What does the volunteer do; what activities have they participated in since the last conversation?*
- ❖ *What problems has the volunteer had?*

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<sup>13</sup> Kármán – Kónya 2008 p. 47

- ❖ *How have they overcome the problems?*
- ❖ *You devise solutions for the current problems together.*
- ❖ *Providing positive feedback to the volunteer (strengths and actual successes)*
- ❖ *In what field does the volunteer need to improve? Who can help them and how?*

*Mentoring and evaluating conversations are regular and can be planned in advance, but you can also have spontaneous discussions or checks if the recipient organisation or the volunteer detects problems that jeopardize successful task performance or may have adverse effects on the organisation.”*

#### **4.6. Dealing with difficult situations**

What volunteer coordinators usually find the most difficult is those situations where there is some kind of tension between volunteers; between a volunteer and an employee; between a volunteer and a client; or between employees about a volunteer. As the coordinator represents both the institution and the volunteers, in such situations they feel pressure from both sides, which is very unpleasant if they don't have objective guideposts.

In such situations it is best to rely on written rules, the written document of the assignment of the tasks, or written records. However, it is a fact that the people concerned get emotionally involved, and, depending on their personality, it might be difficult for them to resolve disputes, and it may become a bitter experience. To avoid this, the coordinator must be able to conduct, as a moderator between the parties, a discussion where everything is clarified.

#### **4.7. Continuous training, supervision**

One of the most difficult tasks of volunteer management in cultural institutions is the organisation of volunteer work. Institutions might think that after volunteer recruitment, selection and onboarding training, in the long term it will be easier to work continuously with volunteers who are motivated and committed to the activities of the organisation. However, it requires special attention that the volunteers involved should retain their motivation and contribute to their and the institution's goals with regular participation and commitment towards the institution. This is where the volunteer programme of many institutions fails.

To maintain motivation in the long term, a key method is to provide continuous training to volunteers, which, on the one hand, increases commitment towards the institution and its activities, and, on the other hand, serves the interest of the institution and the volunteer in terms of continuous growth.

##### **4.7.1. What is the purpose of continuous training?**

The aim of continuous training and the assessment of their results may be different from the viewpoint of the institution and the volunteer, but it is in their common interest: They both develop.

The fundamental aims and results of continuous training are the following:

1. to make sure the institution can achieve its goals reliably, with the services provided by the volunteers
2. to refresh, acquire and test the (professional) knowledge required for task performance
3. to make volunteers aware of and consciously apply the knowledge and skills that are necessary and have been acquired
4. by participating, volunteers declare that they are responsible for performing their tasks professionally, and the organisation declares its responsibility towards its volunteers
5. to organise the experiences gained
6. an opportunity for self-testing and correction
7. emotional ventilation, looking for shared solutions
8. evolving identity of the ever-changing team
9. a deeper understanding of the operation of the organisation, and, through this, maintaining loyalty.

#### 4.8. Changing motivation

When coordinating volunteers, you should be aware that volunteers change. Their personality develops, they gain and then integrate new experience all the time, their situation and life goals change, and so does their satisfaction with the recipient organisation. Their level of geographical mobility may change, the goals set at the start of the volunteer work may change, earlier goals are achieved, new goals are set, and volunteers look for activities that match them.

At an organisational level, a volunteer workforce that has been with the organisation for years is of great value.

The literature on motivation research is considerable, but less attention has been paid to the change of motivation. We briefly present the results of two studies to provide perspective for the experience of the organisations and coordinators concerned.

A study compared the motivation of volunteers in a hospital initially (when they joined the organisation) and later (after 1 year of volunteering)<sup>14</sup>, and a similar study was conducted a few years later among volunteers who had been in the volunteer programme of the Museum of Fine Arts for 5–7 years<sup>15</sup>.

	Initially...		After one year / 5–7 years of volunteering...	
	Volunteers in hospitals	<i>Volunteers at the Museum of Fine Arts</i>	Volunteers in hospitals	<i>Volunteers at the Museum of Fine Arts</i>
Actual tasks and activities ( <i>the task is interesting</i> )	3	1	1	1
Leadership and management issues ( <i>volunteer work is well-organised</i> )	4	3	3	2
The organisation itself ( <i>I like to support this organisation</i> )	1	2	2	3
Assumed/actual benefits ( <i>the opportunities to attend institutions/events are attractive, so are exhibition tours and the feeling of belonging to a community</i> )	2	4	4	4
The categories of the questionnaire used at the Museum of Fine Arts are in italics, the categories of the survey among hospital volunteers are in regular font. 1 – most important, 4 – least important				

The survey at the Museum of Fine Arts confirmed the development of motivations seen elsewhere, especially, and now we refer back to the old and new type of volunteering, the homogenisation and blending of categories. Self-development, originally classified as a new type of motivation, has been found to become an increasingly important factor for older people, while a traditional motivational factor, community, has become more significant for younger people.

This is also consistent with the fact that while initially motivational factors related to utility are more typical, emotional commitment becomes more important over time. It also corresponds to the trend that

<sup>14</sup> Meggyes – Murányi 2010 pp. 79–80

<sup>15</sup> Csordás 2014 p. 9

the older a person gets, the less important career-related motivational factors become, and the more emphasis is laid on common goals, moral objectives and the community as time passes.<sup>16</sup>

As a piece of general advice, we would like to quote László Dorner to summarize the lessons volunteer coordinators can learn from the changes of motivation.

1. It is not enough to assess **motivations** and the skills of the volunteers at the first interview at recruitment. It is very important to **monitor them continuously**
2. You should integrate the new member into the team at the beginning of the volunteer work, and it is equally important to **strengthen the relationship with clients** and provide **emotional support** in case of initial failures (to avoid dropping out).
3. It is important that volunteers feel they are fundamental yet unique members of the organisation, who can choose volunteer activities according to their interests
4. It is recommended that you should **change volunteer positions** within the organisation from time to time to avoid burnout and loss of motivation.
5. If the volunteers' skills improve, they can perform other activities as well (more responsibility)
6. Provide a wide range of **training options** to volunteers so that they can acquire new skills and provide a wider range of volunteer activities (feeling of competence).

#### 4.9. Team building

“There are three basic factors that define a team: shared aspirations, specific objectives and clear rules.”<sup>17</sup> When a new team is forming, the key is that members should get to know one another.

Tuckman's group dynamic model<sup>18</sup> can help us understand the development of power dynamics within a group. In this model there are 5 stages:

1. the team is formed (forming)
2. test of the power balance, a time of storms and fighting (storming)
3. norms are formulated (norming)
4. performance and effective work (performing)
5. stage of re-forming, especially when new members arrive or old members leave (re-forming)

Even when the volunteer team has been established, conscious team building is important, and at this stage needs should be identified before this process begins. The challenge of team building is to understand how teams work.

#### 4.10. Appreciation and recognition of volunteers

To achieve the strategic goals of your institution, you need to provide support to the employees and volunteers. They all need reinforcement.

“Adequate recognition is more than politeness, it is a vital human need” both for the person and for society.<sup>19</sup> It is important that acknowledgement should be a part of the organisational culture, with traditions and rites. It is not a one-time occasion. It is ongoing, honest reinforcement, either in an official framework or expressed spontaneously. If the acknowledgement system develops only in the volunteer programme, the volunteer coordinator will soon have ambivalent feelings: They want to support volunteers emotionally as well, while they themselves don't feel supported.

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<sup>16</sup> Dorner 2016

<sup>17</sup> What makes team building effective? 2010

<sup>18</sup> <https://de.wikipedia.org/wiki/Gruppendynamik> 2016

<sup>19</sup> Nagy, 2013



#### 4.10.1. The benefit of volunteering

The individual and social benefits of volunteering can be summarised as follows.<sup>20</sup>

Benefits of volunteer activities for the volunteer:

1. acquiring new skills
2. gaining work experience
3. gaining experience about organisational and work culture
4. obtaining information about professions, career orientation
5. establishing work contacts
6. experiencing being in a community
7. existential and mental stability for the individuals
8. feeling useful
9. feeling acknowledged
10. self-expression
11. self-reward
12. recreation
13. personality development
14. formal and informal learning.

Benefits of volunteer activities for the society/community:

- supporting social integration and inclusion in the team, decreasing exclusion, strengthening the norms of the team, the institution and organisational loyalty, contributing to the consolidation of the basis of the community, fostering equal opportunities
- creation of social capital: establishing and developing formal and informal relationships in three directions: with clients (for whom), with other volunteers (with whom), and with institutions and their representatives
- task performance of the team in space and time, implementation of the volunteering plan,
- economic benefits
- benefits in terms of socialisation and mental hygiene, increasing social sensitivity and responsibility, especially towards disadvantaged population groups,
- political benefits: strengthening democratic civic values, presenting a model.

#### 4.10.2. Rewards to volunteers

Allowances that can be granted to volunteers and are necessary to perform activities are provided for in legal regulations.

Rewards can also be granted to volunteers to motivate and retain them. Whether these are provided depends on the equipment necessary for the performance of volunteer tasks, the circumstances, and the recipient organisation's means.

*Tip: The reward system of the Szentendre Open-Air Museum*

- |  |                                  |
|--|----------------------------------|
| • Every time:                              | A pastry and a drink.            |
| • After the third occasion (3 × 8 hours):  | Entrance tickets for two         |
| • After the fifth occasion (5 × 8 hours):  | Family entrance ticket           |
| • After the eighth occasion (8 × 8 hours): | 20% discount at the Portéka shop |

<sup>20</sup> Fényes – Kiss 2011

- *After the fifteenth occasion (15 × 8 hours):* Open-Air museum card for 2
- *After the twentieth occasion (20 × 8 hours):* Once a year, if the volunteer organises a family programme in the Open-Air Museum, the use of the premises is free.

#### 4.11. Termination, staff turnover

For active volunteer coordinators, one of the most difficult situations is when the volunteer leaves the organisation either at the request of the coordinator or the organisation, or voluntarily. An exit interview in such situations is very useful, and the following issues should be discussed:

- What is the reason behind the decision?
- How long has the volunteer been considering this?
- Does the volunteer have any suggestions for us coordinators?
- Does the volunteer have any comments or notes that may be useful?

It is a serious decision if the organisation terminates the volunteer activities, and it is challenging to communicate it because of the self-respect of the individual and their future support, and the integrity and reputation of the organisation should also be maintained.

*Tip: In the first ten years of their volunteer programme, the following was added to the volunteer handbook of the Museum of Fine Arts, in response to actual events.*

*“The termination of the volunteer status*

**Termination:** *The volunteer agreement may be terminated by either party with immediate effect.*

**Exclusion:** *The volunteer may be excluded from the volunteer programme if they fail to perform the tasks undertaken on two subsequent occasions without notice or perform said tasks 30+ minutes late, if they act outside their competence, if their behaviour seriously breaches the principles of the museum, or if their conduct or actions are not compatible with the other volunteers or the staff.*

**Dropping out:** *If the volunteer does not contact the programme coordinator or the person responsible for the area for a period of over 2 months, their status will be terminated by the museum. If the volunteer wishes to join the programme again at a later date and if this request is approved by the volunteer coordinator, the returning volunteer shall attend the onboarding training for newcomers – as discussed with the coordinator.*

*If the volunteer status is terminated for any reason, the former volunteer undertakes to return the badge to the volunteer coordinator.”*



## 5. The tasks and competences of the volunteer coordinator

In the previous three chapters, the challenges and tasks the volunteer coordinator has when a volunteer programme is launched and operated were described in detail. As an overview of these diverse activities, let's summarize the tasks, skills and competences of the coordinator, relying primarily on the project documentation created during the EU grant programme *Wake-Up Call: Volunteer Manager Role!*

*The project lists the tasks of the coordinator as follows.*<sup>21</sup>

1. Strategies and policies for volunteer involvement
2. Promotion of volunteering
3. Management of the volunteers
4. Development and recognition of skills gained through volunteering
5. Management support for volunteer activities
6. Managing the work relationships involving volunteers

Ideally, a coordinator has the following skills for the performance of their tasks—again, as it was presented at the closing conference of the *Wake-Up Call* project:<sup>22</sup>

- Sense of initiative, organisational skills
- Digital and mathematical skills
- Social and interpersonal skills
- Communication skills

To acquire this knowledge and to enhance these skills, a 36-hour training material was devised in the course of the project. In Budapest, the Volunteering Hungary – Centre of Social Innovation foundation provides 2-day beginner and 3-day advanced training. There are other training opportunities for coordinators, from simple exchange of experience to conferences and advanced training opportunities. Whichever way you look at it, such diverse skills and knowledge are required for volunteer management that it is no wonder if you think of a superhero when you read about volunteer coordinators.

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<sup>21</sup> Occupational Profile For The Volunteer Manager 2016

<sup>22</sup>Frimmerová 2016

## Summary

As we have come to the end of our Practical Guide, we can safely say that the key to organising a volunteer programme is the self-confidence of the coordinator: This faith will help you through a lot of difficulties and challenges.

Dear institution leaders, From all the information presented in the guide, the key takeaway points for you are the following:

- It is worth taking the opportunity to receive volunteers.
- It is worth registering as a recipient organisation subject to the relevant legal regulations
- It is worth promoting the idea of launching or developing the volunteer programme to the proprietor.
- The launch of a volunteer programme requires careful thinking and preparation.
- The key to the long-term operation of the volunteer programme is its integration into the organisation and its uniform management
- The reception of volunteers increases the transparency of the organisation and the credibility of the institution.
- Appreciate the colleague coordinating the programme as a superhero and promote their professional development.
- It is important that the volunteer coordinator should be suitable for the task. It is not a good idea to assign this responsibility to someone who already has a significant workload.
- The way people are treated and human resource management are at the core of volunteer management, which should work properly at least in the volunteer programme.
- It is important that paid employees should be aware of the volunteer programme and, if possible, they should not see volunteers as competition but as support.
- You can, and sometimes you should, ask for help from external consultants, employees or volunteers—you should explore which is the best solution for your organisation in specific areas.

The complex development effects of volunteer work and the fact that it allows for reality to be experienced in different ways can help ease social problems in the 21<sup>st</sup> century. For adults, volunteer work is a great opportunity to learn responsibility, solidarity and cooperation.

In the training of volunteers, institutions can rely on excellent andragogy experts, volunteer management trainers and practitioners all over the country.

We wish you all the best. Have an effective and successful volunteer programme.

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