



**Toolkit for Recruiting
and Managing Volunteers in
Museums Across the Nordic
Region**

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The Nordic Centre of Heritage Learning and Creativity AB (NCK) is a Nordic-Baltic centre for learning through cultural heritage, located in Östersund, Sweden.



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This report was written by Dimitra Christidou and Anna Hansen on behalf of NCK. The contents of this report reflect the views of the authors who are responsible for the facts and the accuracy of the data presented herein.



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Introduction

Working with volunteers is an on-going process that should be mutually beneficial for the organisation and the volunteers. It starts by thinking reflectively about the organisation's own resources in order to identify its potential for engaging volunteers effectively in its activities. It further includes reaching out to the community, recruiting, orientating new volunteers, receiving and offering feedback regarding their experience and their contribution.

This toolkit is for cultural organisations wishing to develop or improve their work with volunteers. It draws upon examples of practice and regulations from the Nordic region. The first part offers some reflections upon different important aspects of the process of recruiting and managing volunteers, and the second part consists of templates and checklists that can be used as guides through the stages of recruiting and managing. These guides need to be adapted to the circumstances of the specific organisations, which need to take also into consideration the existent policies and regulations applying to their own countries.

This toolkit is the result of the surveys and exchanges of good practices among the partners of the *Pride, Joy and Surplus Value* project (September 2014 – November 2015). During this project, which was partially financed by Nordplus Adult and co-ordinated by NCK, five museums collaborated. These were as follows: Jamtli (SE) collaborated with Museene i Sør-Trøndelag (NO), Maihaugen (NO), Gotland's Museum (SE), and Ringkøbing-Skjern Museum (DK).

Most important tips:

- # Have a volunteer coordinator/person responsible for managing volunteers*
- # Make sure responsibilities and rights are clear both to the volunteer and the museum*
- # Make sure the volunteer activities are well anchored among the museum staff*
- # Show appreciation for the work carried out by volunteers*

Chapter 1. Before you start working with volunteers

1.1 Deciding what your museum needs

Based on evidence from worldwide practice, designating an individual as the **‘volunteer manager’** with the overall responsibility for policies, procedure and induction helps to provide a standardized approach to volunteering practice, including induction. The volunteer manager functions as the contact point for the volunteers; as a point for reference for them during their time as volunteers at the museum.

Irrespectively of having or not a volunteer manager, it is considered important to reflectively consider your organisation’s needs and identify the resources (both financial and human workforce) available. Carefully consider **what the museum hopes to gain** from this collaboration and **what volunteers may gain** in return. It is important to consider what tasks may be suitable for the volunteers – in terms of expected competences, what training you can offer, health and safety and supervision.

In case you identify equal benefits for both the museum and the volunteers, a role description for each volunteering opportunity can be drafted. Having clear role descriptions will inform the next stages of the process and will contribute to the retention of the volunteers. Specifically, the role descriptions need to detail the purpose of the role, the requirements that taking this role up involves.

1.2 Diversity

As the results from the national reports have shown, there is a lack of diversity amongst the volunteers in terms of age and education. It is considered good practice to diversify the volunteers as a way for the museums to reach new audiences and acknowledge in practice the diversity of its communities and society. Examples may include the creation of roles that cater for people with disabilities and building inclusion by working with several ethnic minority groups and under-represented groups.

Towards the same direction and following the demands of today’s society, the museum may for example offer a range of volunteering opportunities in terms of availability of time and not only skills. The museums should create short-term

opportunities for those who may have limited time available to volunteer ranging from a couple of hours to couple of days during several months.

1.3 Volunteer Policy

A volunteer policy is a working document and it reflects **the museum’s commitment to its volunteers** and to volunteering in general. It shows that the museum values volunteers and that considers them as an organic part of the organisation. As it is a policy document, it raises the credibility of the museum as an organisation that takes an ethical and professional approach in regards to all its functions.

In this document, the **roles of volunteers are described** along with their responsibilities and rights, and **clear guidelines are provided to staff**, management committees and the volunteer themselves as to what is expected and what they can expect in return from the organisation. It further clarifies the roles of members of staff in relation to the volunteers.

Volunteers and staff should consult it in order to have a clear account of their **responsibilities and rights**. Therefore, the document should be easy to read and understand, with clear points and concise information. The policies should be reviewed and adapted at certain points during each year based on the needs and the feedback the organization receives.

A volunteer policy defines the roles, rights and responsibilities of volunteers and staff

1.4 Organising your volunteers

In the Scandinavian countries, different associations or clubs have been the most common way of organizing voluntary work. For example, volunteers in museums often belong to an association of “friends of the museum organisation”. When volunteers are organised in their own associations, independently from the museum - though cooperation might be close, the museum tends to have less control and influence over the volunteers’ work and activities. On the other hand, by being independent, volunteers tend to manage several other aspects on their own. This

means fewer responsibilities for the museum such as keeping track of the hours invested, arranging parties, coffee or lunch and having a social meeting place.

Consider the following questions:

- Do you have a volunteer manager who has the time to take care of the volunteers directly?
- Is it possible to use the existing “friends organisation” and turn them into volunteers (if they are not volunteers at the moment)?
- How does the cooperation between the friends organisation and the museum work at the moment?
- Can you have both a friends organisation of volunteers and independent volunteers organised by the museum?

1.5 The responsibilities of the museum

Before starting to work with volunteers, it is advisable to make sure that members of staff understand the contribution of volunteers to the work of the museum and the reasons why the museum wants to draw upon the volunteers as resources. The **differences between the paid members of staff and volunteers should be clear** as well as the roles of volunteers within the museum and the staff’s own role in relation to the volunteers. Additionally, the museum has the overall responsibility for the **health and safety** of the volunteers and for **providing training** in case they lack the skills required for the tasks they will carry out. The museum is also responsible for making sure the volunteers are properly insured.

Having a **dedicated space for volunteers** is also among the responsibilities of the hosting institution. Volunteers value highly the feeling of togetherness, which is facilitated by providing your volunteers with a physical space where they can meet with other volunteers and feel at home. This contributes to their wellbeing and overall positive experience. Nonetheless, this space needs to be part of the museum’s life so that the dedicated space does not create a sense of exclusion from the rest of the museum.

Before you start working with volunteers:

What will the museum gain from the volunteers?

What will the volunteers gain from being volunteers?

Create a volunteer policy to make clear the roles, rights and responsibilities of volunteers and staff

How should your volunteers be organised?

How can you make sure you take care of practical issues connected to volunteers?

Chapter 2: Recruiting and welcoming your volunteers

This chapter provides advice on how to establish a positive relationship with the volunteers from day one. It suggests that having a clear agenda and guidelines gathered in one document, accessible online and onsite, allows museums to showcase their good intentions and their commitment in building new successful relationships with their volunteers.

2.1 Step 1: Finding the volunteers

Several studies have shown that the most common way of recruiting volunteers is through word of mouth – that is, through existing volunteers. However, this way of recruiting tends to reproduce the socio-economic and educational status of the volunteers who are already engaged in volunteering activities and thus, does not contribute to the aforementioned diversity issues. Other methods used are adverts in local papers, brochures and social media. Irrespectively of the various ways of advertising the volunteering possibilities, the museums – or the volunteer organisation – need to plan the recruitment carefully and make sure it is part of the museum's strategy and agenda.

2.2 Step 2: Identifying skills and interests

During this phase of the recruitment process, **structured or informal conversations** between the organisation's representatives/representatives of the volunteer organisation and the volunteers should take place. These conversations are unique opportunities for **both parties to get to know each other better**, to reflect upon the current situation, plan ahead and build an effective volunteering

team. Questions about the volunteers' motivations, skills and experiences will help the museum to form a better idea of the volunteers' capacities and interests. It is constructive to review their skills and competencies and identify possible opportunities for them, or contributions they may make, that the museum was not aware of. However, it is important to bear in mind that **training might be needed** for several volunteers who may either lack the skills and experience or want to do something completely different to their area of expertise in order to learn new things. It is thus important to have a plan at this stage regarding skill development and training for volunteers.

These discussions also should provide plenty of opportunities for the potential volunteers to ask questions. Here the role description is an important tool in order to present the different possibilities available to the volunteer. This is also the occasion during which the museum should ask the volunteers to read and sign, if they agree, the contract while also explaining adequately the Health and Safety regulations.

2.3 Volunteers' Welcome Pack

Many organisations design their own volunteer welcome packs, which function as the reference point for recently recruited volunteers. These may include a welcome leaflet, a description of the organisation's management structure, a clear statement of the organisation's vision, mission and aims, the contact details for the museum, the volunteer manager – if any, and the contact person in case of an emergency, and the programme of activities and events for the next months. Any policy document should be also included in these, such as the volunteer policy, coupled with a copy of the volunteer agreement. Information regarding the codes of conduct for volunteers should be included here so as to make sure that both parties (the museum and the volunteers) are aware of the regulations and their rights. These documents need to be accessible both online and onsite.

A welcome pack may include:

- # Volunteer policy*
- # Information about the museum*
- # Contact details*
- # Role description*
- # Code of conduct for volunteers*
- # Contract/agreement*

2.4 Volunteer agreement or contract

Some organisations find a written agreement too formal, while others find it useful. If you do not need a written agreement, you could create something similar calling it for example “expectations on volunteers and what to expect from the museum” and hand it out as information in the welcome pack. If you have volunteers for example working with **confidential material**, you might need a signed agreement instead. The important content of this document is to **clarify the relationship between the museum and the volunteer, in terms of responsibilities**. Typically an agreement will contain a list of what the museum will provide: training, support, reimbursement of expenses, specialist equipment, access to specialist clothing, insurance etc. and a list of what you would like the volunteer to provide: agreement to follow organisational policies with regard to health and safety, equal opportunities,, wearing special clothing, clauses of confidentiality if working with certain material, rights to be photographed etc. It is essential that the detail of the agreement as well as the volunteer policy has been made known to the volunteer and further, that a breach of the policy may result in termination of volunteering.

A volunteer contract/agreement may include:

- # Clauses of confidentiality*
- # Rights to material produces – such as photos*
- # Codes of conduct, clothing etc for the volunteer*
- # Benefits provided for the volunteers*
- # What the museum will provide e.g. clothes, training, insurance*
- # Agreement to let the museum check criminal records, right to take photos of the volunteer or other things*

2.5 Introduction day

The museum should make a systematic attempt to provide a detailed orientation and induction day as a good volunteer induction will get the volunteering relationship off to a positive start. As such, the organization ensures that **volunteers understand where they fit into the overall vision of the organisation and how their role will contribute to achieve this**. Once having introduced the volunteers to both the museum's work, agenda, programme and premises, special attention and details should be given to any security and emergency procedures, health and safety issues.

Opportunities for training and development should be provided on a continuous basis. Specific role based training can be delivered in a variety of ways from shadowing existing volunteers to bringing in specialists to deliver training in, for example, delivering engaging guided tours.

Welcoming your volunteers:

How are you going to recruit them?

Do you have a structure/specific questions to ask them at an introductory interview?

Do you need a formal contract? What should such a contract include?

What kind of information do the volunteer need? Can you put that together in a welcome pack?

How are you going to introduce the volunteer to the museum and its role?

Chapter 3. Managing volunteers

When you have your volunteers in place, it is important to retain them. Providing them with feedback, training and acknowledging their contributions are some of the possible ways the museum may adopt so as to showcase how much it values and appreciates their efforts and contributions.

3.1 Feed-back and appreciation

Recognising and **celebrating volunteers' contribution on a regular basis** shall be among the priorities of the volunteer manager where available, or the whole organisation. Celebration events, dinners, and coffee breaks may be a useful way of getting the volunteer team together with paid staff and publicly thanking everyone for their contribution to the success of your museum. Local and national newspapers can also be used in order to widen dissemination. If you use social media then mention volunteers regularly on Twitter, Facebook or in blogs, and thus, acknowledge and celebrate their contribution. Alternative ways for acknowledging their role, time and effort are encouraged as for example the use of a publicly available noticeboard detailing the contribution of the volunteer team and/or individual achievements.

Apart from recognising widely and publicly the volunteers' contribution, it is also equally important to maintain the volunteer's high spirits by offering them opportunities to engage with tasks in creative and exciting ways.

One of the most important things to volunteers is to be shown appreciation

3.2 Rewards

Many museums offer volunteers rewards or benefits, which seem to be similar at most museums, and include free entrance to the museum, discount at the museum's shop, free coffee or lunch, pre-views of exhibitions, tours, lectures or courses arranged by the museum staff and, sometimes, excursions to other interesting museums or places. However, for the volunteers, these benefits are just one part of

the reward. The survey conducted by the project shows that volunteers value the possibility of meeting people, socialising and learning new things just as much as the tangible benefits provided by the museums. The museums should thus make an effort to provide “rewards” in various forms.

3.3 Ending the volunteering relationship: When the volunteers chose to leave

Volunteers will leave for a range of reasons, as many as there were for them starting volunteering in the first place. Following the good practice of asking volunteers for the reasons why they wanted to volunteer and the skills they may bring to their new role during the recruiting stage, a brief ‘**exit interview**’ will contribute to the evaluation of their experience. Their evaluation is a way to receive feedback that may inform the next volunteer recruitment, as well as expressing the institution’s gratitude for their involvement.

Cases are expected with volunteers who simply stop coming to the museum without previously notifying the organisation. It is therefore considered important that the museum proactively carries out regular checks into the volunteer registry and attempts to have follow-up informal discussions with those ending their volunteering status unexpectedly through telephone or email.

3.4 Ending the volunteering relationship: When you have to ask the volunteer to leave

Having clear expectations on both sides contribute to a positive volunteering experience. The volunteer agreement may be a useful document to turn to if the volunteer’s conduct is not what you have expected. In case of a **breach of the policies** included in the volunteers’ agreement, a confidential chat may be all that is needed to agree changes to the role that would enable the volunteer to feel happier and to continue volunteering for you. However, if there is a persistent issue the whole volunteer team can be disrupted and if a resolution can’t be found then you will need to consider asking the volunteer to leave.

Although volunteering is a lifelong learning experience, there are certain circumstances when volunteers may need to be asked to step down. These may be cases with volunteers whose **mental and physical abilities deteriorate** due to a

number of reasons such as dementia or poor health. It is of utmost importance for the museum to offer lifelong learning experiences to all while remaining a safe environment for all. The manager, in collaboration with the volunteers, needs to examine each case individually in order to realise if, by retaining the specific volunteer, there are chances of challenging the safety of others.

Managing volunteers:

How will you show the volunteers appreciation?

What kinds of rewards or benefits will the volunteers have?

How do you follow up on volunteers that leave?

How do you handle volunteers who don't follow agreements or become a risk to others?

Resources

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<http://www.aim-museums.co.uk/downloads/cab0e6b1-dd7e-11e1-bdfc-001999b209eb.pdf>

APPENDICES– Checklists and Forms

APPENDIX A – Checklists

A1. Internal evaluation before volunteers' recruitment

1. What is the museum hoping to get from the volunteers?
2. What would be suitable roles for volunteers?
3. What will the volunteers gain from being at the museum?
4. Who will be responsible for managing the volunteers? Do we have a plan that covers how volunteers will be recruited, supported, trained, and developed in the organization? Who has responsibility for volunteering policies, procedures and guidance and how often they will be reviewed?
5. How can we provide feedback and rewards?
6. Is there widespread support for volunteering in your organisation at all levels? Does staff understand the roles of volunteers and their own role in relation to the volunteers?
7. Do we have insurance that covers volunteers whilst carrying out their voluntary roles?
8. How do we ensure equality of opportunity and diversity?
9. Do we need to consider any health and safety issues for the volunteers?

A2. Writing Role Descriptions

1. What kind of role is it and what is its purpose?
2. What skills and aptitudes does this role require?
3. Is this role for long or short term (i.e. linked to a specific exhibition, event or project)?
4. Is this role distinctively different from paid roles within the organisation?
5. Why is this role suitable for a volunteer and not a paid member of staff?
6. What are the benefits for the volunteers of taking this role?
7. What are the organisation's expectations of volunteers in relation to this role?
8. Who will supervise and advice the volunteers?

A3. Checklist volunteer policy

Policies that might be useful for volunteers

- Volunteer Policy
- Equality and Diversity Policy
- Health and Safety Policy
- Child Protection Policy
- Confidentiality Policy
- Data Protection Policy

B. Samples of Forms

B1. Volunteer agreement contract sample

Volunteers are an important and much appreciated part of **[organisation name]**. We appreciate the time, commitment and energy you bring to our organisation. This agreement sets out what kind of things you can expect from us, and what we expect from you. We hope that you will enjoy your time volunteering with us.

Our aims are to:

- welcome you and introduce you to how our organisation works and your role in it,
- help you orientating and knowing your way around our premises
- advise you on security and emergency procedures,
- advise you on the care of the premises,
- advise you of the standards/codes of conduct we expect for our organisation and encourage and support you to meet the requirements
- offer assistance and feedback on your contribution and suggest ways for further personal development
- reimburse your out of pocket expenses incurred whilst volunteering for us in line with our policy
- keep you informed of changes that may affect you
- ensure your health and safety by providing a safe place for you to volunteer in (see the Health and Safety Policy), and provide suitable insurance cover for all our volunteers whilst they are carrying out their agreed volunteering roles.
- uphold all policies and procedures affecting your voluntary role
- adhere to our equal opportunities and diversity policy at all times
- try to resolve fairly any problems, complaints and issues during the time you volunteer with us.

I, [Name of volunteer], agree to:

- volunteer to the best of my ability

- take part in the induction day
- do my best to follow [organisation name]’s rules and procedures, including health and safety, equal opportunities and confidentiality in relation to our organisation, staff, volunteers and customers/visitors.
- meet any agreed time commitments and standards required by the demands of the work or project in which I have been engaged.
- inform as soon as practicable if attending is not possible in cases of sickness or other personal reasons.
- in the event of dispute or grievance arising with the museum, to abide by the procedures laid down by the museum and the relevant policies.
- Take breaks from duty as a volunteer in the designated rest areas. I also agree to keep all personal belongings in the secure areas provided for volunteers by the museum.
- I agree to sign an attendance register on each day I come to work as volunteer.
- I accept responsibility for all tools, equipment and protective clothing made available to me for the duration of the agreement.
- I understand that I am entitled to free admission to the museum and eligible for staff discount on purchases in the museum’s refreshment areas and in the museum shop throughout the period covered by the agreement.
- I understand that I am entitled to ask the museum for a reference based on my service as a volunteer if I wish to do so.

More details on these issues are provided in the volunteer welcome pack, and in the various corresponding policies, which you are advised to read.

Please note: *this agreement does not constitute a legal employment contract of any kind. This agreement may be ended at any time at the discretion of either party. Neither of us intends any employment relationship to be created at any point.*

I accept that this agreement is valid for the period to and that any subsequent renewal of the agreement is made at the discretion of the museum.

B2. Volunteer agreement contract sample (Ringkøbing - Skjern Museum, Denmark)

Bilag 2
Dato: ___/___ - 20

LAUGSAFTALE

Aftale om frivillig arbejdskraft
Indgået mellem

Navn: _____

Adresse: _____ Postnr _____

Email: _____ Tlf: _____
(TYDELIGT)

&

Ringkøbing-Skjern Museum
Bundsækvej 25, 6900 Skjern

Evt. afdeling/laug: _____

Aftalen dækker opgave/rne: _____
(kun én laugsaftale pr. person pr. år —ikke pr. aktivitet/laug)

Ringkøbing-Skjern Museum er taknemmelig for al den indsats der ydes for at medvirke til at skabe kulturoplevelser i relation til museets virke og målsætninger. Et museumskort udleveres ved første frivillige deltagelse pr. år

Timeantal på ét år må gerne skrives her, det skal indberette til forsikringsselskabet: _____

Den frivillige kan ved indgåelse af nærværende aftale forvente påskønnelse for det udførte arbejde, jf. Ringkøbing-Skjern Museums Frivilligpolitik - som tilbydes ved underskrivelsen af aftalen. Personinformationerne indgår i museets frivilligdatabase, og deles ikke med andre instanser. En kopi af nærværende aftale kan rekvireres ved henvendelse til museets administration.

I tilfælde af at den frivillige, i forbindelse med sit virke på museet, indvilger i at arbejde med børn uden forældrenes tilstedeværelse har museet tilladelse til at indhente en børneattest, som er påkrævet i henhold til loven.

Samarbejdet fordrer; at oplysninger om museet der kommer den frivillige til kendskab under udførelsen af arbejdet kan være forbundet med tavshedspligt. En tavshedspligt der ikke ophører ved samarbejdets ophør. Samarbejdet kan gensidigt bringes til ophør med dags varsel.

Den frivillige _____ Medarbejder/ Ringkøbing-Skjern Museum _____

Udfyldes af museets medarbejder ✓

- Ved modtagelse af denne aftale fik den frivillige udleveret et museumskort
- Har fortalt den frivillige at han/hun skal skrive navn på kortet ved modtagelsen
- Har tilbudt den frivillige en frivilligpolitik/fortalt at den findes på hjemmesiden
- Har tjekket at hele skemaet er udfyldt
- Den frivillige skal kun lave ÉN aftale pr år. Han er blevet spurgt; om denne er den eneste han har udfyldt, og at han ikke har fået et museumskort tidligere i år. Der udleveres ét museumskort pr. frivillig pr. år.



B3. Volunteer agreement contract sample (Lillehammer Museum, Norway)

AVTALE frivillige i formidling sommersesongen 2014

Avtaleparter:

Arbeidsgiver: Stiftelsen Lillehammer museum (SLM). Org.nr. 955 378 024

Maihaugvegen 1, 2609 Lillehammer

Frivillig: [navn]..... Født:

Adresse:

Ansvarlig: [Navn på personale]

Avtalen gjelder for perioden [inkluder dato] og opphører etter endt periode uten ytterligere varsel.

FOR AVTALEN GJELDER:

- Det utbetales ikke lønn eller andre former for godtgjørelse til frivillige
 - Arbeidssted er Maihaugen, Lillehammer
 - Hovedfunksjon: [navnet på arbeidsplassen]
- Oppgaver kan endres i avtaleperioden som tilpasning til aktiviteter og formidling i sommersesongen.
- Frivillige må følge obligatorisk opplæring og brannøvelse.
 - Dersom avtalen ikke fungerer i forhold til oppgaver og ansvar, kan avtalen avsluttes.
 - For frivillige gjelder den til enhver tid gjeldende instruks, regler og reglement for virksomheten.
 - Frivillige er forsikret under oppdrag gjennom SLMs forsikringsordning for frivillige.
 - Nødvendig kompetanse og HMS-godkjenning må dokumenteres av den frivilliges arbeidsleder.

FOTOGRAFIER TATT I ARBEIDSFORHOLD

SLM har ansvar for å dokumentere, forske, bevare og formidle materiale som belyser liv og livsvilkår i Norge. Fotografier er en viktig del av dette arbeidet.

Fotografier som blir tatt i avtaleforholdet vil inngå i SLM sine samlinger og være tilgjengelig for alle former for bruk som naturlig følger med museenes virksomhet, for eksempel utstillinger, forskning, markedsføring / brosjyrer, publikasjoner og på internett. Dette gjelder også bilder tatt av frivillige gjennom sommersesongen. Publikum har anledning til å fotografere aktivitet til privat bruk.

Dato:

Dato:

koordinator

Frivillig

Underskrevet avtale og taushetserklæring sendes:

***Innen [dato] til Lillehammer museum, Maihaugvegen 1, 2609
Lillehammer***

TAUSHETSERKLÆRING

Jeg forplikter meg til så vel i avtaleperioden som etter dennes opphør å bevare fullstendig taushet overfor uvedkommende om forretnings – og bedriftshemmeligheter, data- og personopplysninger som jeg er blitt kjent med som frivillig. Dette gjelder uansett i hvilken form slike opplysninger er produsert, tilgjengelig eller lagret.

Jeg vil også vise aktsomhet i omtale av andre forhold som jeg blir kjent med eller erfarer som frivillig.

HVORDAN KLE SEG OG TE SEG

Jeg har lest og forstått skrivet som følger med kontrakten som omhandler hvordan man kler seg og ter seg på jobb på Maihaugen, Postmuseet og dikterhjemmene Aulestad og Bjerkebæk.

Jeg vil kle meg og te meg etter de retningslinjer som følger av dette skrivet og dersom jeg er usikker vil jeg spørre en av mine overordnede.

Dato:

Underskrift:

Stiftelsen Lillehammer museum