

Evaluating a Museum's Volunteer Program

Shirley M. Lundin, CVA

BACKGROUND

Early in the 1970s, an extraordinary historic property entered the Chicago-area real estate market. This cedar-shingled complex, located at Forest and Chicago Avenues in Oak Park, Illinois, was built in 1889 by a 22-year-old fledgling draftsman, Frank Lloyd Wright. Wright borrowed \$5,000 from his employer, Louis Sullivan, to build a small cottage for his bride, the 18-year-old Catherine Lee Tobin. This home marked the beginning of a remarkable career destined to change the face of American architecture.

Here, between 1889 and 1909, as the architect's colorful and controversial life unfolded, he created wonderful rooms for his expanding family. In 1898, he attached a studio to his home, merging his architectural practice with his family life. Here the Prairie School of architecture was conceived and developed. And here it thrived until 1909 when Wright abruptly left both the home and studio.

In the ensuing years until 1972, the property changed hands frequently, its ample space producing both rental income and living quarters for its owners. When the building was offered for sale, it was badly in need of repair.

VOLUNTEERS TAKE LEADERSHIP

Through the efforts of determined and dedicated volunteers, funds were raised to purchase, restore and preserve the first home created by Wright for his family and his Oak Park studio. In 1974, vol-

unteers formed the Frank Lloyd Wright Home and Studio Foundation and negotiated the property's purchase by the National Trust for Historic Preservation in a co-stewardship agreement. In 1976, the Frank Lloyd Wright Home and Studio was designated a National Historic Landmark.

STAFF ADDED

Professional staff were hired to work with volunteers to develop a restoration plan and to oversee 13 years of extensive and carefully authenticated restoration activities. Volunteers gave tours throughout the restoration process to assure a steady income and to build public awareness of Wright's impact on American architecture. The Ginkgo Tree Bookshop, which provides important financial support for the Foundation's programs, was launched and operated by volunteers. While the bookshop now employs a core staff, volunteers still are the backbone of daily operations and serve visitors on a daily basis. Today, the property is a fully restored historic house museum where over 550 volunteers offer a range of services daily to tourists and scholars alike. In addition to the public-serving volunteer components, a board of directors and 23 volunteer committees participate in long-range planning and work closely as partners with staff to direct the foundation's programs. Volunteer involvement is the most consistent strength of the entire organization.

By 1988, when the tasks associated

Shirley M. Lundin, CVA serves as a principal of Lundin and Associates, a management consulting firm. Her professional expertise is volunteer management, training and organizational development. She is the former Volunteer Coordinator for the Frank Lloyd Wright Home and Studio Foundation and was a consultant in adult development and volunteer program administration for Girl Scouts of the USA. Ms. Lundin has also been a Child Development Associate trainer and Education Coordinator for Head Start. An active volunteer, she holds a BA from Northwestern University and a Master's degree in Adult Continuing Education from National-Louis University.

with volunteer management had exceeded the time and energy constraints of both volunteers and existing staff, the first volunteer coordinator was hired.

ORGANIZATIONAL CHANGES

The homey, relaxed, "let's do it" atmosphere of a small, single-minded volunteer group underwent change as more volunteers were needed to accommodate daily demands. There were more forms and record-keeping, more restrictions on use of the home and studio, fewer spontaneous "happenings." The atmosphere had shifted from one of active hands-on involvement in restoring a building to a more guarded, white-gloves approach to preserving a museum. Many changes had occurred. As goals were accomplished, new goals were developed and new volunteer responsibilities evolved. Volunteers were still essential to maintain the upbeat, enthusiastic quality of daily operations but now staff were responsible for the scheduling and supervision of volunteers.

NEED FOR PROGRAM EVALUATION

A formal evaluation of volunteer satisfaction had not been undertaken for at least three years prior to the arrival of the new volunteer coordinator. The volunteer coordinator, aware that the organization's growth had created some stress-points, was committed to establishing an ongoing evaluation process to "take volunteers' temperatures" on a regular, preferably triennial, basis.

What evolved was a nine-step process which has become the model for future evaluations.

THE EVALUATION PROCESS

Step One: Gain Acceptance for and Ownership of the Evaluation Process

One of the volunteer coordinator's first accomplishments was to recruit and activate a Volunteer Services Committee. This committee is responsible for overseeing all aspects of the volunteer program in close partnership with the vol-

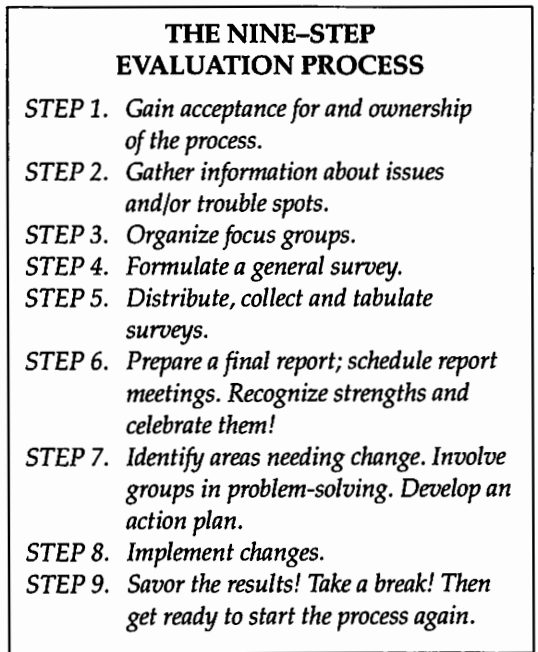


Figure 1
The Nine-Step Evaluation Process

unteer coordinator. Initially, when the coordinator introduced the evaluation concept to the committee, some members were apprehensive. Shadows of an earlier attempt to "evaluate" individual volunteer performance still darkened memories. A new proposal for a volunteer program evaluation seeking to measure the *satisfaction* levels of current volunteers, rather than to *evaluate* individual volunteers, gained support. One committee member not only agreed with the concept but persuaded a market research firm to donate its services to assist with the project. With few exceptions, both committee members and staff were ready to support the project.

Step Two: Gather Information About Issues/Trouble Spots

A meeting was scheduled with staff, who supervised volunteers, and volunteer leadership, whose close daily contact with volunteers helped to identify any concerns and friction points. Among the trouble spots named for further examination by volunteers in focus groups were:

- level of discomfort with organizational changes;
- methods of selection for key leadership positions and special assignments;
- timeliness of updates about pertinent information;
- degree of satisfaction with supervision and recognition.

Group members also wanted feedback about their own effectiveness as supervisors and leaders, and an overall reading of the volunteers' satisfaction with the organization.

The volunteer coordinator convened a meeting to share the "laundry list" of concerns with the market research consultant who transformed the concerns into a sequenced set of focus group discussion questions. The committee was now ready to poll volunteers.

Step Three: Organize Focus Groups

It was important to select a well-rounded cross-section of volunteers to participate in the focus groups. Among criteria were:

- length and time of service: how many years? week-end or weekday? four hours or four days a month?
- volunteer role: public serving? behind-the-scenes? board or committee member?
- demographics such as age, sex, and place of residence; job status.

With a selected list of about 30 people representing all volunteer areas, the committee easily recruited two focus groups of 10–12 members each.

A central off-site location was arranged for the meetings. Notes were sent to each focus group member confirming date, time and place. Aided by an assistant who recorded all comments, the consultant facilitated both groups, then compiled the responses into a written report. The consultant met with the *ad hoc*

committee one more time to discuss the findings from the focus groups.

Step Four: Formulate a General Survey

With the focus groups' verification of the original "laundry list," and the addition of a few new questions, the consultant developed a four-page survey for mailing to all 550 volunteers.

The survey began with a few "warm-up" questions such as a checklist of reasons for volunteering and a rating of overall satisfaction with the program. Volunteers then were asked to rate 24 straight-forward statements such as, "I am given enough updates...(to do my job)." Three ratings were used: either "agree," "neutral," "disagree," or "satisfied," "neutral," "dissatisfied."

A checklist on the last page allowed respondents to identify their volunteer assignments and mark the one in which the most time was spent. The last page also requested demographics such as place of residence and length of service both in years and in hours volunteered each month.

Step Five: Distribute, Collect and Tabulate Surveys

Every volunteer was mailed a survey and given a return deadline. Almost 50% of the surveys were returned, far exceeding normal response rates. The survey's format was developed for easy input into a database program created by a computer-literate volunteer. The program could also generate computer reports for comparison and analysis. Another volunteer skilled in data input helped the volunteer coordinator log individual survey responses into the database. The program allowed every survey question to be compared in an unlimited number of ways for each volunteer position. Staff and volunteer leadership were able to request reports compiled from only their own volunteers. Reports for the whole volunteer corps as well as smaller segments were also calculated.

An open-ended question, "What could

the Foundation to do to make volunteering a better experience for you?" offered an opportunity for unsolicited comments and generated many additional handwritten comments. Each was transferred to a 3"x 5" note card, then sorted into general categories such as:

- Leadership;
- Scheduling;
- Recognition;
- Effect of Change;
- Continuing Education;
- Communication;
- Training;
- Social.

The comments were then typed into a verbatim report, giving a valuable compilation of viewpoints.

Step Six: Prepare Final Report; Schedule Report Meetings

Several types of reports emerged from the summarized database ratings and the verbatim comments. Staff and volunteer leaders could request data comparisons from only their own volunteers as well as the figures compiled from all respondents. The board of directors, staff and committees received preliminary written reports as well as verbal ones at their meetings.

Respondents were effusive in their many complimentary comments and warm appreciation for the Foundation's programs and personnel. These comments were shared as were comments of a more critical nature. Selected results were reported through the *Volunteer Newsletter* as a way to disseminate information and to generate interest in a full report meeting.

Step Seven: Identify Areas Needing Change; Involve Groups in Problem Solving; Develop an Action Plan

Finally, a special report meeting was scheduled for all volunteers, as the culmination of almost a full year of planning, preparation and analysis. The

agenda included a report given by members of the Volunteer Services Committee, time for small group discussions and for the full group to reconvene and share mutual concerns.

Discussion helped promote better understanding of mutual concerns by encouraging direct dialogue. For example, volunteers who felt overlooked when appointments to key leadership positions were made, expressed their concerns. On the other hand, those charged with filling key positions wanted better information about willing volunteers. All agreed that a better system for posting and filling key positions was needed. The Volunteer Services Committee accepted the assignment of developing such a system.

Step Eight: Implement Changes

Simple-to-make adjustments happened immediately: more informational updates and new volunteer job openings were published in the *Volunteer Newsletter*; soft drinks were made available. More extensive organizational change such as review of committee structure and leadership selection procedures were delegated to appropriate committees.

Step Nine: Savor Results! Take a Break! Get Ready to Start Again!

The workable and replicable Nine-Step Evaluation Process documented here is a product of the successful completion of this volunteer program survey.

The Volunteer Services Committee of the Frank Lloyd Wright Home and Studio Foundation hopes that others may benefit from the process developed with guidance from a professional in market research and the creative efforts of our own staff and volunteers. This process enabled us to seek direction for program improvement from our own most valuable resource—our volunteers.