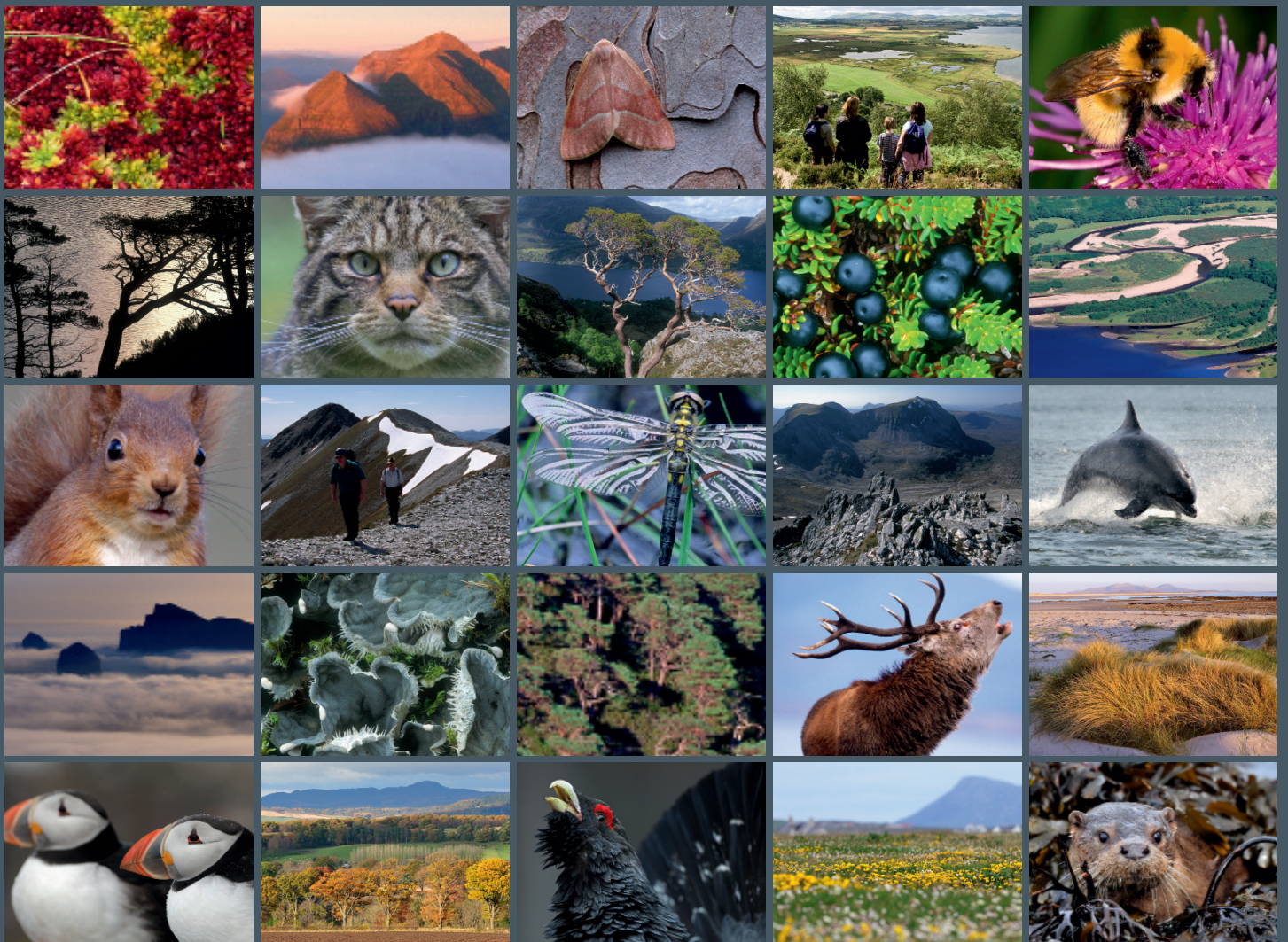


# Investigating the roots of involvement in the natural heritage: marketing and motivation and their influence on volunteer recruitment and retention in the natural heritage sector





**Scottish Natural Heritage**  
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# ARCHIVE REPORT

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**Archive Report No. 023**

**Investigating the roots of involvement in  
the natural heritage: marketing and  
motivation and their influence on volunteer  
recruitment and retention in the natural  
heritage sector**

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In order to make these reports more available, we have decided to publish them online under the series title of **Archive Reports**. These will be numbered consecutively in the order that they are prepared for web publication. Their publication date, authors and title will be recorded as presented in the original report.

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## ARCHIVE REPORT

# Summary

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## Investigating the roots of involvement in the natural heritage: marketing and motivation and their influence on volunteer recruitment and retention in the natural heritage sector

**Archive Report No. 403**  
**Project No: F06AB11(b)**  
**Contractor: Clear Plan**  
**Year of publication: 2015**

### **Keywords**

Environmental volunteering; motivating volunteers; recruiting volunteers; developing volunteers; managing volunteers.

### **Background**

This research was undertaken during 2008 but remained unpublished until 2015. It is therefore inevitable that many of its findings and observations were out of date by the time of publication, and that details and facts should be treated with caution. Much has changed in the fast-moving field; in particular many of the organisations discussed have developed their practice in working with volunteers, often in line with the report's recommendations.

The research aimed to inform improvements to the volunteer experience through providing evidence on what motivates volunteers in the natural heritage sector, and through uncovering what lessons might be learned from other sectors.

The research looked at:

- How well host organisations in the sector understand what motivates their volunteers
- How host organisations in the natural heritage sector manage and support their volunteers, and how this compares with practice in other sectors
- How well host organisations in the sector understand what motivates volunteers, and how this informs marketing and recruitment
- How environmental volunteering may be promoted and supported at project and policy level by SNH and others

The research programme comprised:

- A review of literature on volunteers and volunteering
- A programme of interviews with volunteer managers from natural heritage organisations
- A programme of interviews with volunteer managers from other sectors
- A review of written policies and procedures employed by natural heritage organisations

## Main findings

- Practical conservation work and biological recording are the most common activities for volunteers in the natural heritage.
- For most of the organisations in the study, ‘custom and practice’ in volunteer recruitment constitutes an effective recruitment strategy even if it is not formally recognised as such.
- There is little evidence of a planned and coordinated approach to recruiting volunteers in the sector.
- Few of the organisations in the sample appeared to have any formal method of generating an understanding of the motivations of their volunteers.
- Interviewees do have strong anecdotal and informal understanding of volunteer motivations, gathered from working closely with and alongside volunteers.
- For the majority of the volunteers simply taking positive action to support nature conservation provides the initial motivation to volunteer and ongoing motivation to continue volunteering.
- Despite acknowledged deficiencies in volunteer management in the natural heritage sector there is little evidence available that this has affected retention rates for volunteers.
- The researchers have identified three factors that may limit the effect of any deficiencies in the quality of volunteer management.
- Many voluntary opportunities in the natural heritage sector require very little ‘hands-on’ management once initial training is undertaken.
- The strong alignment of volunteer motivations with the objectives of host organisations in the natural heritage sector may prevent volunteers from becoming demotivated.
- For most host organisations, the core group of volunteers are retired individuals from more affluent and better educated backgrounds. This may mean that volunteers are better able to ‘self-manage’.
- The evidence from this research suggests that for many volunteer-involving organisations in the natural heritage sector supply of potential volunteers exceeds the availability of volunteer opportunities.

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## 1. RESEARCH AIMS AND METHODOLOGY

Evidence from SNH grant funding of voluntary organisations suggests that over 6,000 new volunteers take part in natural heritage activity each year, yet there is little information about why people get involved, their aspirations, and how volunteers deepen their involvement over time. This research will provide SNH with an insight into how volunteering contributes to the achievement of corporate objectives and how this contribution can be enhanced.

This research was commissioned to improve the understanding of how host organisations gather information on the motivations of their volunteers and potential volunteers and how they use this information to recruit, retain and deepen the relationship with their existing volunteers.

There are three research aims:

- To gain a better understanding of how host organisations in the natural heritage sector understand the motivations of volunteers and potential volunteers, market volunteering opportunities and recruit volunteers.
- To gain insights into how the host organisations in the natural heritage sector manage and support volunteers and how this compares with volunteer management practice in other sectors.
- To gain insights into how environmental volunteering may be promoted and supported at project and policy level within and out with Scottish Natural Heritage

The research investigated:

- How host organisations present volunteering within general marketing and communications activity
- How host organisations understand the motivations of existing and potential volunteers
- How host organisations recruit volunteers
- How barriers to volunteering are identified and addressed
- How volunteers are managed to encourage retention
- How volunteers are rewarded, valued and developed
- How the host organisation seeks to deepen its relationship with volunteers
- Why volunteers leave and if anything is known about their activity after they leave

The research programme consisted of:

- A review of literature on volunteers and volunteering
- A programme of interviews with volunteer managers from natural heritage organisations
- A programme of interviews with volunteer managers from other sectors
- A review of written policies and procedures employed by natural heritage organisations

The consultants drew up a list of key research and guidance on volunteering and volunteer management. This list was supplemented by additional material identified by the clients. A review of this literature identified a set of key themes for exploration in interviews and signposts to further literature pertinent to the research aims.

Further literature, in particular written policies and procedures, was identified through the interview programme, a review of documentation and websites, and a formal review of the literature around volunteering. Twenty-one interviews were carried out, 16 with staff in host organisations from the natural heritage sector and five with staff from volunteer involving organisations from other sectors. A full list of interviewees is presented in Appendix 1.

The inclusion of host organisations from other sectors allowed the research to compare the nature of volunteer recruitment and management within the natural heritage sector with practice in other sectors. It also provided some insight into how volunteer management is developing across the wider voluntary sector.

The interviews sought to gather information on practice and policy, and insights into the effectiveness of that practice and policy, on three main themes:

- volunteer recruitment
- volunteer activities and volunteer management
- volunteer motivations and deepening the volunteer relationship

The briefing paper and full list of questions for interviewees is presented in Appendix 2.

## **2. MOTIVATIONS AND MARKETING**

This chapter presents findings and conclusions on how host organisations in the natural heritage sector understand the motivations of volunteers and potential volunteers, market volunteering opportunities and recruit volunteers.

### **2.1 Volunteer Activities**

Research commissioned by SNH (Volunteer Development Scotland 2007b) surveyed 204 volunteer-involving organisations from across the natural heritage sector and showed that over 23,000 volunteers were involved in the natural heritage and from this contributing around 90,000 hours of effort every month.

This audit categorised the range of activities which volunteers undertake into four key areas:

- Practical Work – managing & improving habitats, improving access, etc.
- Biological Recording – surveying, counting, managing data
- Education/training & awareness – preparing publications, interpreting information, working with schools, training others, leading walks etc.
- Organisational Support – managing & co-ordinating other volunteers, sitting on committees, administration, campaigning, marketing, driving etc.

A comparable audit (English Nature 2004) produced a very similar list of volunteering activities.

The interviews carried out for this report identified practical work and biological recording as the most common activities for volunteers in the natural heritage. This is consistent with the common motivation of volunteers to enjoy the natural heritage more fully through volunteering.

Fewer volunteers undertake education/training and awareness, and organisational support. Where they do so it is often one aspect of a wider range of volunteering activity. The volunteers who undertake these activities often have a deeper or longer relationship with the host organisation. These volunteers are prepared to volunteer for activities where the direct benefit is to the host organisation rather than directly to the environment.

This form of volunteering appears to be more common in smaller organisations and locally-based organisations, or branches of larger organisations where there are fewer staff resources to undertake administrative tasks and where the distinction between the staff and the volunteers is less defined.

“Our volunteers don’t really feel as if they are volunteering for some big distant organisation, they feel as if they actually are the organisation, that’s why they do so much that really doesn’t look like it would be a lot of fun”.

Several organisations stated that they were dependent on volunteers to deliver a great deal of their work. This implies that the organisations and the volunteers are co-dependent, i.e. the organisation would not exist without volunteers and the volunteers rely on the organisation to coordinate opportunities and to provide an infrastructure and legitimacy to their volunteering.

### **2.2 Who volunteers in the natural heritage?**

From our analysis of the interviews carried out within this research it is possible for the researchers to construct a typology of volunteers in the natural heritage.

Table 1. Typology of volunteers in the natural heritage

Role		Motivation
Long term, high input volunteers	Volunteers who have been with the organisation for many years, who have a strong identification with the organisation, and who expect to remain with the organisation for the remainder of their active lives. These volunteers may be involved in a range of activity and often took on roles in coordinating or leading other volunteers in localised activity.	These volunteers tend to be motivated by an affinity with, or passion for, the work of the organisation.
Community Action and Community Development volunteers	Similar to the previous type but without necessarily having the long-term relationship with the host organisations. This form of volunteering occurs where people within a community identify an environmental or natural heritage issue and seek the support of a host organisation to plan and implement action.	These volunteers rarely volunteer as individuals and are motivated by a desire for change in their local environment.
Short-term, project volunteers	Volunteers recruited through national programmes who are there on specific time-limited programmes of activity with clear aims and structure. Several host organisations in our sample anticipate that this group may become long-term, high-input volunteers in the future.	The promotional material for these opportunities highlights the personal development and employability benefits to the potential volunteers.
Volunteer Governors	Volunteers who participate in governing the organisation at board level, or who participate in locally-based committees.	They are generally motivated by an altruistic desire to 'give something back' to a cause that they believe benefits someone or something other than themselves.
Volunteer Administrators	Volunteers who perform administrative 'leg work', type letters, work in shops, etc.	Most often motivated by the social opportunities provided by volunteering
Volunteer Experts	Volunteers who offer a particular skill or expertise to an organisation. This can range from legal or other professional advice to technical advice on aspects of natural heritage management and preservation.	They are motivated by support for the host organisation aims, pro bono professional philanthropism or desire to help others. On occasion they may be motivated by career or business development opportunities indirectly available from association with the host organisation.
Volunteer	Volunteers who give a significant amount of	Often recent graduates

Semi-Staff	time, undertake a complex activity, often project-based and act in a similar manner to paid staff.	seeking work experience for career development.
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The majority of natural heritage organisations in our sample do not maintain records on the age, ethnicity, educational status or socio-economic background, of their volunteers. It is therefore impossible to say with any accuracy who the volunteers in the natural heritage actually are.

With the exception of information on age and gender few organisations in our sample maintain records of volunteers in relation to equality and diversity categories. Similarly, few natural heritage organisations in our sample gather data on the socio-economic status of their volunteers, or their levels of education. This supports the findings of the VDS audit (Volunteer Development which noted that 77% of respondents were not collecting any information on their volunteers at all.

An exception to this is BTCV Scotland which has delivered several programmes over the past few years focused on increasing the number of volunteers from traditionally under-represented groups, including young people at risk, BME groups, people with health problems, travellers and homeless people. Data from the UK-wide BTCV “Environments for All” programme show that the majority of participants in the programme came from disadvantaged urban areas, almost half the beneficiaries were unemployed and 13% were disabled.

Evidence from interviewees suggests that volunteers who have been with a host organisation for a longer period are likely to be from an older age group. Young people are present in the volunteering demographic but these volunteers tend to stay for shorter periods of time, often linked to participation in a formal programme of volunteering. Interviewees also suggest that for the majority of volunteer involving organisations in the natural heritage sector the typical volunteer is more affluent and has a higher than average level of education, although again this information is based on the perceptions of staff in volunteering organisations rather than on monitoring data. Some interviewees were aware that BME groups are under-represented in volunteering in the natural heritage. Only two organisations in the sample stated that there were no particular social groups which were under or over-represented in the demographic profile of their volunteers. The absence of monitoring data of course means that all of the above is based wholly on the perceptions of staff.

### **2.3 Barriers to volunteering in the natural heritage**

Research by the Institute for Volunteering Research (2004) exploring the link between volunteering and social exclusion and the perceptions of volunteer managers suggests that there are particular groups less represented in the general profile of volunteering in the natural heritage. This therefore implies that there are specific barriers to volunteering in the natural heritage for some groups.

The VDS Audit and Review of Natural Heritage Volunteering (Volunteer Development Scotland 2007b) examined barriers to involving volunteers from the perspective of volunteer-involving organisations. It found that health and safety, the criminal record disclosures process, the high cost of training courses for volunteers and the lack of funding for paid posts to manage volunteers are barriers to involving volunteers.

A report (Highlands & Islands Enterprise 2007) into the extent to which the supply of volunteers affects the delivery of services through the voluntary sector across the Highlands

and Islands found that the organisations surveyed expressed concerns around recruiting volunteers, with a shortage of volunteers being an issue for many service-delivery voluntary organisations. The time required to comply with regulatory requirements, such as criminal record disclosures, is identified as an issue, as is lack of staff time to recruit volunteers. Meeting growing health and safety requirements is also cited as a barrier to the recruitment and involvement of volunteers, particularly those involved with the environment. This supports the conclusions in the VDS audit and review (Volunteer Development Scotland 2007b).

An Institute for Volunteering Research report (Institute for Volunteering Research 2004) looked into barriers to volunteering, the impact of volunteering on reducing social exclusion, the challenges faced in making volunteering more inclusive and the steps taken by organisations in overcoming these barriers. The research was carried out with Black and Minority Ethnic groups, disabled people, and people with a record of offending behaviour - all of whom have been identified as being under-represented in formal volunteering, and proposed the following classification of barriers.

*Table 2. A classification of barriers to volunteering*

Psychological Barriers	Practical Barriers
The image of volunteering as white, middle class, mainstream	People don't know how to find out about volunteering
People feel that volunteering isn't relevant to them and their situation	Over-formal recruitment and selection processes are a barrier to those with low levels of literacy, those without English as a first language etc.
Lack of understanding of what volunteering is and can be	Delays in recruitment process leading to volunteers losing interest
Misunderstanding of the time commitment required	Physically inaccessible buildings and environment
Fear of prejudice and stereotyping from staff	Failure of organisations to reimburse expenses
Fear of loss of benefit, loss of independence and loss of identity	

There is little empirical evidence on hard-to-reach groups which is specific to volunteering in the natural heritage. In the absence of specific data it appears reasonable to assume that these barriers are, in general, pertinent across all volunteer-involving organisations.

#### **2.4 Targeting of Volunteer Recruitment Activity**

Although there was little evidence of formal volunteer recruitment strategies which explicitly targeted particular types of people it was clear from the interviews that, for the majority of the host organisations in our sample, volunteer recruitment practice selects particular skills for particular volunteer opportunities.

“The people we need for the volunteering opportunities we offer have to have a certain standard of education otherwise they wouldn't be able to do the work and, in effect, they would be no use to us. We can't invest time to support people who couldn't do the work.”

Recent graduates from further and higher education are often targeted for their ability to work with less supervision than other volunteers, for their high levels of motivation and, where they were recruited from studies with an environmental focus, for their specialist knowledge.

Several organisations target young people because motivated and able young people are valuable and effective volunteers. These are normally young people with a pre-existing interest in environmental activity and who are able and motivated to take on significant volunteering responsibility.

One organisation targets volunteering opportunities at young people not in education, employment or training. This organisation is more generally focused on working with people who can benefit directly from the volunteering experience than are the other organisations in our sample.

Although few of the organisations in our sample reported it, other evidence, such as from Communities Scotland & Scottish Natural Heritage (2006), suggests that people with additional support needs or mental ill health are often targeted by natural heritage organisations. The rationale for targeting these groups is often less about natural heritage objectives than providing a therapeutic benefit to the volunteers through exposure to the natural heritage and participation in voluntary activity.

The BTCV Green Gym Programme is an example of an intervention which sets out to benefit individuals through opportunities to volunteer in the natural heritage. The first Green Gym was launched in England in 1998. Since then 95 have been established across the UK. Over 10,000 people have worked on improving some 2,500 green spaces – as well as their own health and fitness. Twenty of the projects are now run entirely by the volunteers.

Several organisations target people in particular geographic areas. This is linked to the availability of volunteering opportunities associated with particular sites, for example monitoring of rare plants or invasive species.

One organisation deliberately targets people in disadvantaged areas, using the Scottish Index of Multiple Deprivation as a means of identifying the areas. This is driven by an environmental justice commitment to improving access to a high quality environment and by a social justice commitment to providing people in disadvantaged areas with additional opportunities to learn new skills and potentially increase their employability. One organisation employed a staff member to increase the uptake of volunteering opportunities by individuals from BME groups.

Organisations interviewed as part of this research were aware that they are more successful in attracting particular sections of society. This is explained to be a result of tradition rather than targeting. The networks through which volunteers are available, and the sections of society that have time and motivation to volunteer, are reported to be consistent over time and across volunteer involving organisations in the natural heritage. This means that young people and retired people are over-represented in the profile. Because in some cases the volunteering activity is also designed to provide therapy for the volunteers there is evidence that people with additional support needs are more common in some forms of volunteering.

Interviewees expressed little understanding of the potential role of demographic data as a tool to inform recruitment strategies or management of volunteers. Interviewees also expressed little understanding or interest in using demographic data to identify gaps or under-represented groups in their volunteer profile.

None of the organisations appear to have considered reviewing the demographic profile of their volunteers to identify gaps, under-represented groups, or to inform recruitment and/or marketing strategies. This may partly be a result of the fact that for almost all of the organisations in the sample, attracting and recruiting volunteers is not a problem, therefore they have no organisational impetus to consider how to attract others.

## **2.5 Recruiting Volunteers in the Natural Heritage**

Recruitment of volunteers is an important stage as it sets the scene for the relationship between the volunteer and the host organisation. How an organisation communicates its mission, and what it can offer the volunteer, is a key determining factor for whether or not volunteers choose to get involved and stay involved.

There is very little evidence in the published literature around how volunteers are recruited to volunteering in the natural heritage sector. The audit (Volunteer Development Scotland 2007b) of volunteering in the natural heritage commissioned by SNH does ask this question but there is limited information in the report on the prevalence, nature, or content of dedicated recruitment strategies. This report found that local networks/word of mouth is the predominant route into volunteering in the natural heritage. The English Nature report (2004) also identifies word of mouth and being asked to get involved as the top method of volunteer recruitment. The use of local notice boards, community advertising, websites and local media are less successful recruitment routes, and Volunteer Centres or local CVSs even less so.

If natural heritage organisations rely on word of mouth as a primary recruitment strategy, it is almost inevitable that the type of people coming forward to volunteer will be from similar social backgrounds to existing volunteers. This has implications for the diversity of the profile of volunteers in the natural heritage, particularly given that the image of volunteering is that it is white, middle class and mainstream. Organisations that participated in piloting the Volunteer Impact Assessment toolkit (Volunteer Development Scotland 2007a) found that volunteering helped to ‘create a diverse organisational culture’. There were both positive and negative responses to questions about volunteering ‘creating an open and inclusive organisational culture’. Only one organisation in our sample felt that involving volunteers provided an opportunity to increase organisational diversity and bring new people into their organisation *“we are able to be more inclusive and diverse through involving volunteers”*.

Previous research for SNH (Volunteer Development Scotland 2007b) has shown that 65% of volunteers got involved because ‘someone asked them’. Actively going and asking people to volunteer is more proactive and can be more targeted as an approach. It can help to address gaps in demographics, encourage people with particular skills to get involved, and generally widen out the accessibility of the natural heritage.

The interview programme for this research identified that host organisations regularly receive unsolicited approaches from potential volunteers and that existing volunteers are a good source of referrals of new volunteers. This backs up the idea that word of mouth is the most common method of recruiting volunteers. Although a few organisations recognise the value of volunteers in marketing the organisation in general, there is little evidence of specific activity to encourage existing volunteers to attract new volunteers.

For most of the organisations in the study, ‘custom and practice’ in volunteer recruitment constitutes an effective recruitment strategy even if it is not formally recognised as such. Whilst most volunteer recruitment is relatively passive, in the cases where it is actively pursued, for example in attracting recent graduates, there was evidence of some sophistication in how this is undertaken.

Active methods which are used to attract volunteers include:

- Snowballing, i.e. existing volunteers getting other people from their own social networks to volunteer.
- Publication in various media (leaflets, posters, newsletters, websites).

Several organisations employed workers based in local communities who had a role in promoting volunteering opportunities and recruiting volunteers.

Published media exclusively intended to attract new volunteers were not commonly identified from our review of policies and procedures. For the vast majority of organisations in the sample published media are more general in content and the promotion of volunteering is a part of that content. The National Trust for Scotland and Loch Lomond and the Trossachs National Park both publish a range of media aimed at attracting new volunteers. Interviewees offered some comment that the publication of media was not an effective method of attracting new volunteers. It did however provide opportunities for recognising the contribution of existing volunteers.

Interviewees reported that in recent years websites have become an effective tool in attracting new volunteers. Organisations reported that it is common for them to receive unsolicited approaches from volunteers following exposure to websites. This may be because email and contact forms on websites reduce the 'gap' for the potential volunteer between considering approaching an organisation and doing so.

Recruiting volunteers does not appear to be integrated into marketing strategies in any significant or explicit way. Marketing activity is primarily concerned with promoting the activities of the organisation. In the case of membership organisations, marketing activity also has a strong concern with increasing membership. A major source of volunteers for some organisations is through their membership, therefore there is some indirect link between marketing and volunteering. This however is far from explicit or consciously developed. Few organisations sought to record how volunteers had found out about them and no organisations had analysed data where they were available.

Within this research most of the interviewees reported that they had no difficulty in recruiting sufficient volunteers. It was not clear whether this is because the organisation managed its work programme according to the available volunteer resource or because the available volunteer resource was plentiful. There is evidence that a small number of organisations limited their use of volunteers because they were not in a position to offer volunteers any purposeful activity. This could suggest that the 'potential capacity' for volunteer involvement in natural heritage organisations is greater than 'actual capacity'. The report (Volunteer Development Scotland 2007b) of the SNH commissioned audit of volunteering in the natural heritage found that organisational capacity to use volunteers is limited by the time staff have available to support and train volunteers and by the funding to support volunteers.

If this is the case then it provides some explanation of why the volunteer profile tends towards the better-educated and more able, simply because host organisations have enough choice in volunteers that they can select the 'best' for their own organisations. By extension this may explain the limited levels of investment in volunteer management and support in the natural heritage organisations in the sample – the volunteers in natural heritage are capable of undertaking their assigned work without significant investment in support.

A small number of interviewees expressed mild surprise at the idea of a volunteer recruitment strategy. There is little evidence of a planned and coordinated approach to recruiting volunteers in the sector. Interviewees suggested that recruitment strategies were

not formally developed because there is no need to invest resources in volunteer recruitment as the organisation has little difficulty in attracting volunteers without specific effort.

## **2.6 Impact of Marketing and Branding on Volunteer Recruitment**

Academic research into the influence of branding and marketing on the recruitment and retention of volunteers (Bussell & Forbes 2003) highlighted that although work on using marketing strategies to recruit volunteers is widespread in the USA it is less common in the UK. In their study they highlighted that where there are any marketing activities or strategy, they were not well-planned or integrated but were rather *ad hoc*. Bussell and Forbes (2003) also showed that continuing to market or communicate with the volunteer through the lifecycle of the volunteer's involvement helped to retain the volunteer as it reminded them of their connection with the cause which had perhaps motivated them to volunteer in the first place.

The scope of this research did not require a full review of how organisations market themselves, communicate their organisational aims and, building on this, promote volunteering and recruit volunteers. It was possible however to explore this as part of the research into how organisations recruit volunteers and communicate their organisational aims to potential volunteers.

Volunteer development agencies such as Volunteer Development Scotland (VDS) ([www.vds.org.uk](http://www.vds.org.uk)) and Volunteer Centres ([www.volunteerscotland.org.uk](http://www.volunteerscotland.org.uk)) promote the value of marketing of volunteering and branding in the recruitment of volunteers. Whilst individual volunteer centres may not have the resources to invest in marketing activities, they do have a consistent brand across Scotland and an online volunteer promotional portal which has gone some way to increase involvement in volunteering.

One organisation which sought to change the image of volunteering with a dedicated approach to marketing and promotion was ProjectScotland ([www.projectscotland.co.uk](http://www.projectscotland.co.uk)). ProjectScotland was an independent charity created to promote volunteering and personal development in young Scots aged 16-25. It offered 3-12 month placements for young people. Many of these placements were with natural heritage organisations such as the National Trust for Scotland and BTCV Scotland. The ProjectScotland website was designed as a portal to encourage young people to participate in volunteering with a youth focused and led design, film clips, ring tone downloads, cartoons, images – all connecting with young people and associating volunteering with being dynamic and exciting.

ProjectScotland invested in a wide range of marketing material, including short films in cinemas, adverts on television and on buses and recruitment strategies via schools and youth agencies. In doing so the organisation recognised that they could not rely on young people coming to them. ProjectScotland's marketing material was clearly and quite explicitly focused on ensuring that young people understood the benefits they would receive from volunteering - from work experience to fun, as well as financial assistance.

A review of the websites and marketing material of some of the main volunteer involving organisations in the natural heritage in Scotland provides some insights into image, branding and volunteering.

The National Trust for Scotland ([www.nts.org.uk](http://www.nts.org.uk)) involves some 3,000 volunteers in its work and provides a wide range of opportunities for volunteering across the main areas of the organisation – conservation, gardens, archaeology, fundraising, tearooms and shops, historic buildings, general administration etc.

The National Trust for Scotland's strapline 'A Place For Everyone' is reflected in the strapline for their volunteer marketing material 'A Place for Volunteering'. The website provides a direct link to information on volunteering from the homepage. The website does not provide a downloadable volunteer application form, although it is possible to become a member of the National Trust for Scotland or donate online. There is no information on volunteer expenses or the availability of training and support.

The National Trust for Scotland produces a newsletter aimed directly at volunteers called 'The Volunteer'. They also have a trifold leaflet available in all of their properties called 'A Place for Volunteering'. A major source of volunteers for the National Trust for Scotland is their membership.

British Trust for Conservation Volunteers ([www2.btcv.org.uk/display/btcv\\_scotland](http://www2.btcv.org.uk/display/btcv_scotland)) is the UK's largest practical conservation charity. It exists to get people involved in practical conservation and in doing so is focussed around meeting the vision of "*a better environment where people are valued, included and involved*". Stimulating, retaining and developing volunteer involvement is at the heart of the BTCV mission. The BTCV Scotland website is almost wholly concerned with volunteer recruitment. The home page explicitly presents the different kinds of opportunities and the benefits to individual volunteers.

Like The National Trust for Scotland, the BTCV website informs potential volunteers about volunteering and its benefits but does not allow them to apply for volunteering opportunities online. Information is available on volunteer expenses and training and support, although it is not immediately obvious which weblink provides this information.

BTCV also invest in volunteering marketing and promotional materials, including the publication 'Supporting Communities & Environmental Volunteering'. The guide aims to encourage more grassroots action to conserve green places and wildlife habitats whilst presenting how this will help to improve the skills, confidence and health of all those taking part.

BTCV and The National Trust for Scotland are comparatively large, well-resourced voluntary organisations – with a direct focus on recruiting and involving volunteers. In undertaking this review it was also important to look at how smaller national organisations and also locally-based organisations marketed volunteering in the natural heritage.

The Loch Lomond and the Trossachs National Park ([www.lochlomond-trossachs.org](http://www.lochlomond-trossachs.org)) website home page offers little reference to the role of people in the development and management of the Park. The 'Caring for the Park' pages dedicated to volunteering provide information on specific volunteering opportunities and the benefits of volunteering. Unlike BTCV Scotland and the National Trust for Scotland, the Loch Lomond and the Trossachs National Park provides downloadable information on volunteering, including role descriptions and application forms. Potential volunteers can therefore directly engage with the organisation from the website.

Plantlife Scotland directly promotes volunteering on its home page ([www.plantlife.org.uk/uk/plantlife-scotland.html](http://www.plantlife.org.uk/uk/plantlife-scotland.html)). "Plantlife Scotland has a lively volunteers programme. If you'd like to become one of our Flora Guardians and help us to monitor endangered plants and sites threatened by non-native invasive species, please see our "Get Involved" page for more details." The information on volunteering on the 'Get Involved' pages is comprehensive but not as immediately accessible from the homepage as on some other sites. The benefits of volunteering to the volunteer are not explicitly detailed.

Most interviewees were unsure of the influence of image and branding on volunteer recruitment, although a few ventured that young people may be put off by the image of the

organisation itself. In the absence of monitoring data on how volunteers found out about organisations, and the volunteering opportunities presented, it is difficult to evaluate the impact of branding on volunteer recruitment.

Interviewees were confident that once volunteers were attracted there was a form of 'brand loyalty' although this was more correctly a loyalty to the host organisation rather than any imagery or branding. "Our volunteers are really loyal to us, they identify really well with the organisation. I don't know what effect branding or any of that has on them though, I think it is more about the activities and the other people they work with."

The marketing activity undertaken by the organisations in the sample is not particularly integrated with volunteer recruitment, except in the case of the organisations that were most strongly focused on volunteer involvement as part of their explicit mission or business model.

## **2.7 Understanding Volunteer Motivations**

An understanding of the factors that motivate potential volunteers to come forward or respond to marketing material, and the factors that encourage volunteers to stay with a host organisation, is clearly an important underpinning to effective volunteer recruitment and management practices.

"If volunteers are to develop commitment, their personal beliefs, temperament and personal goals need to be in tune with the organisation's. This allows the volunteers to meet their motivational goals in a way that develops their competence and achievement" (McCudden 2000).

The English Nature research (English Nature 2004) found that when asked about their motivations, 92% of volunteers want an opportunity to support nature conservation. The next most common motivational factor is enjoying the heritage/conservation activity and enjoying being in the outdoors and natural environment. The report found that the donation of skills to be a more common motivational factor than the development of skills.

In Autumn 2006, Jane Dalglish, a senior civil servant, was seconded from the Scottish Government to undertake a study into the current issues relating to environmental volunteering in Scotland and to assess the relevance of environmental volunteering in the wider Scottish context.

The Dalglish report (Dalglish 2006) highlights that organisations involved in the research had no shortage of willing volunteers, although it should be noted that this work focused on larger, national organisations rather than smaller, more community-based ones. The report highlights that there is little known about the nature and motivation of environmental volunteers and that any evidence around this is small-scale or anecdotal.

The report identifies the following possible motivations for volunteers in the natural heritage:

- To contribute to the improvement of the environment
- To interact with nature
- To acquire and/or develop new skills
- To improve health and wellbeing
- To develop and mix socially

Few of the organisations in our sample appeared to have any formal method of generating an understanding of the motivations of their volunteers. Some gather information on volunteer motivations through asking 'why do you want to volunteer for us?' in application

processes. This information tended to be used to appropriately place the individual volunteer or to assess their immediate support needs.

There is little evidence of host organisations analysing this information to inform the development of overall management practices and recruitment strategies. Interviewees do have strong anecdotal and informal understanding of volunteer motivations, gathered from working closely with and alongside volunteers. There is some rejection of the need to implement processes to gather and analyse information on volunteer motivations.

“I work with volunteers day in day out, I know these volunteers and why they volunteer because I talk to them. I don’t really need to ask them to fill in another form to understand this.”

Inevitably there are variations in the factors that motivate different types of volunteer, however our interviews confirm the findings of the English Nature research (2004) that for the majority of the volunteers simply taking positive action to support nature conservation provides the initial motivation to volunteer and ongoing motivation to continue volunteering. This motivation is strongest in the long-term, high-input type of volunteers who form the core volunteer workforce for most organisations in the sample.

Young people can be similarly motivated but this motivation is balanced by a desire to develop new skills, either in technical aspects of natural heritage management or simply in working on projects. Young people also tend to move on more often than do older volunteers.

“A lot of our young people are just as dedicated as our older volunteers but their lifestyles are such that they often move on, either because they have exhausted the learning opportunities we can give them – and that’s only right, they can then move on to something else – or because they physically move away for employment or education.”

Interviewees suggested that it is common for young volunteers to leave volunteering simply because of changes in their circumstances. They stated that it was common for young volunteers to return to volunteering with the same organisation years later when their circumstances afforded them greater opportunities to volunteer.

The organisations that target recent further and higher education graduates are very clear about the motivations of their potential volunteers and have pre-designed volunteer opportunities and management systems specifically for this target group. These volunteers however are the exception rather than the rule in many organisations’ volunteer workforce. They are regarded as ‘high-value’ volunteers who can deliver a return for the organisation more than commensurate with the investment of staff time in recruiting, briefing and managing them.

Our interviewees thought that although volunteers in the natural heritage enjoyed the social aspect of volunteering activity, increasing and improving social networks was not a common motivation for coming forward to volunteer.

Previous research for SNH (Clear Plan 2006) commented on how organisations traditionally considered to be focused on delivering natural heritage outcomes often strike a balance between delivering outcomes for people and for the natural heritage. This is reinforced by the fact that for the majority of organisations in our sample there is a balance struck between delivering benefits to volunteers and delivering benefits to the natural heritage.

For a number of organisations volunteers are a valuable human resource without which it would be difficult to deliver the organisational natural heritage objectives. Research carried

out by English Heritage (English Heritage 2003) which looked at volunteering in the Historic Environment found similar results.

“Without volunteer input, most of the organisations that operate within the heritage sector would struggle to survive, and their capacity to contribute to the tasks of researching, managing and conserving the heritage would be severely constrained. The National Trust, for example, is a true partnership of volunteers and paid staff, with volunteers undertaking 45 per cent of the organisation’s total work”.

Although the corporate objectives of most organisations in our sample are explicitly framed in terms of benefits to the natural heritage, for many of them access to and enjoyment of the natural heritage by people is a key aim. In practice this means that while volunteers are undertaking practical work on natural heritage sites they are also accessing and enjoying the natural heritage at the same time. This corresponds with the motivation of the majority of volunteers to enjoy the natural heritage through volunteering in it. At least one organisation explicitly recognized this.

“Volunteers get greater access to our sites and our collections than the general public. We couldn’t actually provide that level of access to the general public for all sorts of reasons, hence using volunteers lets us achieve more than one thing.”

The Dalglish report (Dalglish 2006) comments on the potential for tension when volunteering is promoted or measured on its capacity to deliver other outcomes for the volunteer, e.g. health, employability, etc, when the motivation of the volunteer is primarily to enjoy the natural heritage.

We encountered little recognition of this tension in the interview programme. However, should evaluation and volunteer impact assessment become more rigorously implemented in natural heritage volunteering, consideration may need to be given to issues around seeking to measure benefits which are not recognised or sought by the volunteers themselves. This may be particularly relevant in relation to the long-term volunteers who appear to form the majority of volunteers in the natural heritage.

## **2.8 Deepening the Relationship with the Volunteer**

The concept of deepening/developing the volunteer relationship needs some definition. We propose that there are three ways in which this concept can be interpreted:

- Development of a deeper relationship with and understanding of the natural heritage
- Development of a deeper relationship and understanding/ownership of the host organisation
- Development/deepening of the relationship with the volunteer to enable the volunteer to develop as a person/professional

In terms of the first relationship – between volunteer and the natural heritage (or environment more generally) – the VDS Impact Assessment report (Volunteer Development Scotland 2007a) indicates that volunteering does impact positively upon ‘awareness of environmental issues’ and ‘participation in eco-friendly activities’. There is therefore potential to be developed in terms of deepening the relationship between volunteer and the environment.

Our research shows that natural heritage organisations in our sample are focussed on recruiting and involving volunteers to get the job done, and do not have a dedicated approach to deepening the relationship with the natural heritage. This may be one of the motivations of the volunteer – to be involved and generate better understanding of the

environment, but the organisations do not maximise on this as they could do. They also do little to encourage a deeper relationship with the organisation.

The National Museums of Scotland and the National Health Service both involve large numbers of volunteers and have a good understanding of the motivations and aspirations of the volunteers and how this leads to a deepening relationship with history and heritage, or the quality of lives of patients. In addition, the Children's Hospice showed some practical sophistication in incrementally offering volunteers additional activity of greater complexity or strategic importance to the Hospice. This not only deepened the volunteer understanding of the needs of children, but provided volunteers with a role in taking forward corporate aims to raise funds and keep the Hospice open.

In relation to development/deepening of the relationship with the volunteer to enable the volunteer to develop as a person/professional there is limited evidence on which to form conclusions. BTCV Scotland have a well-established 'volunteer career development' route for volunteers, eventually leading to employed status. Other organisations seem to do this by informally selecting certain volunteers for enhanced roles including paid employment. We found little evidence of any strategic or policy commitment to developing/deepening the volunteer relationship. There is some limited evidence that the extent to which this took place is dependent on the skills and time available to volunteer managers and on the availability of enhanced volunteering opportunities.

"A lot of our volunteering opportunities only take a few hours a year and there's no need to ask volunteers to do anything else. Even if they wanted to do more it's difficult to know what we could get them to do."

### **3. IMPROVING THE VOLUNTEER EXPERIENCE**

This chapter presents findings and insights into how the host organisations in the natural heritage sector manage and support volunteers and how this compares with volunteer management practice in other sectors.

#### **3.1 Volunteer Management**

SNH policy on volunteering in the natural heritage recognises the critical role of volunteer management, through its commitment to: “promoting and supporting good practice in volunteer management we aim to ensure that all volunteers enjoy, and benefit from, their involvement in volunteering”.

Volunteer management is crucial to ensuring the volunteers have a good experience, a safe experience, and a valued experience. Volunteer management is not separate from recruitment and should be seen as a complete package – encompassing recruitment, retention and management of volunteers.

The English Nature Volunteer Survey (English Nature 2004) looked at volunteer management and highlighted deficiencies in the quality of volunteer management within the sector: “Having volunteered some months ago, I am still waiting for a chance to begin”. “There should be some training when you volunteer ....and travel expenses should be paid for.... As for the health and safety information – I haven’t had any”.

All but one of the organisations in our sample acknowledged that there are weaknesses in volunteer support and management. This reflects both the desire of the individuals interviewed to improve the quality of volunteer management and an awareness that some elements of volunteer management are not good enough.

Volunteer management doesn’t happen unless someone has responsibility for it. The Dalgleish report (Dalgleish 2006) highlights that Volunteer Managers need to: “be genuine all-rounders, able to inspire and learn, possessing in addition to their environmental skills, a wide range of people related skills”.

The Scottish Association of Volunteer Managers states that the expertise of the Volunteers’ Manager is fundamental to ensuring that volunteers’ skills and efforts are matched to a suitable role. The Scottish Association of Volunteer Managers has identified three types of volunteer managers in the natural heritage sector.

- The “volunteer” volunteer manager
- The “occasional” volunteer manager
- The “dedicated” volunteer manager

The SNH Audit of Natural Heritage Volunteering (Volunteer Development Scotland, 2007b) indicates that the natural heritage sector is more dependent than others on volunteers for carrying out volunteer management. There are a large number of small, local organisations in the natural heritage sector and the nature of some national organisations’ work is that it is delivered at a local or site-specific level by teams of volunteers managed by a more experienced volunteer. For most of the organisations in the sample this is an effective way to manage volunteers particularly where staffing resource is too limited to allow dedicated staff management of volunteers.

The occasional volunteer manager is a paid member of staff who has a role which includes the management of volunteers as one part of a broader job description. The SNH Audit of

Natural Heritage Volunteering (Volunteer Development Scotland 2007b) found that this is the most common arrangement for volunteer managers in the natural heritage sector. In many cases the volunteer managers are trained in more technical aspects of natural heritage management and have little or no volunteer management experience. Several of the larger organisations in the sample do make volunteer management training available to occasional volunteer managers although none of them make this a mandatory requirement. There were differences of opinion among interviewees on the effectiveness of the occasional volunteer manager model:

“Our staff have been managing volunteers for a long time and are good at it. If they weren’t we wouldn’t be able to keep the same volunteers for the length of time we do.”

“Some of our staff are good at working with volunteers but it’s just because they happen to be good at working with people. I think that wouldn’t be true for all of them, and even the best probably could be better at some aspects of it.”

The dedicated volunteer manager is a member of staff who does nothing but recruit and manage volunteers. Dedicated volunteer managers are not uncommon in the larger organisations. They tend to take on a more strategic role in relation to recruiting volunteers; supporting occasional volunteer managers, improving volunteer management, and working directly with volunteers on projects of national significance.

Smaller organisations are unlikely to have staff dedicated to volunteer management. A few do employ staff to support community groups and organisations to plan and deliver natural heritage activities, but this role is more akin to community development than volunteer management.

The volunteer managers and other senior staff included in the interview programme identified the following deficiencies in volunteer management:

- Induction processes are poorly developed or implemented
- Training for volunteers is limited
- Systems to match volunteer skills and motivations to volunteer opportunities are not well developed
- Systems to record volunteer activity are not well developed

It should be noted that most organisations in our sample only reported issues in one or two of these areas. Deficiencies in volunteer management are explained as arising through a lack of resources to implement consistent, fit-for-purpose best practice in volunteer management and support. At least one organisation was about to appoint a member of staff with a remit directly of supporting improvement in volunteering and/or community engagement.

One of the outcomes of the Dalglish report (Dalglish 2006) into environmental volunteering was the development of the ‘Improving Environmental Volunteering Project’ which is focused on:

- Resourcing a Volunteer Management Development Officer post dedicated to delivering support, and to mentoring volunteer managers involved in environmental volunteering
- Linking environmental volunteering organisations into the support networks and expertise around volunteering

The aim of the Project is to ensure that volunteer managers have the right set of skills, and that they are well-trained and equipped to undertake their role and to encourage a wider

diversity of volunteers. It has grown out of an understanding that volunteers are not always well-managed because the sector does not always have the capacity to support volunteer management – or to understand its importance. The Volunteer Management Development Officer came into post late 2007 supported by funding from the Scottish Government through the Forum for Environmental Volunteering Activity. Any future action by SNH to improve the quality of volunteer management will need to take account of the activities of this post.

Volunteer Development Scotland (VDS) is endeavouring to strengthen the role of Volunteer Manager and to provide an accredited qualification route for their development. During 2008 VDS in partnership with the Scottish Qualifications Authority (SQA) is introducing three new accredited programmes for those who manage volunteers. A new Customised Award at SCQF level 6, Coordinating Volunteers, was launched in February 2008 (subject to validation by SQA). In the summer of 2008 this will be followed by a Professional Development Award at SCQF level 8 - Managing Volunteering. A further Customised Award at level 7, Management of Volunteers will follow in autumn 2008.

VDS offer non-accredited learning opportunity programmes of one-day events on a range of volunteer management topics. They also provide a consultancy service to enable organisations to develop good volunteering practice that will enhance volunteer management practice and the volunteering experience. Few of the Volunteer Managers interviewed as part of this research had accessed any of this kind of training or support.

VDS has also developed a new quality standard for volunteer managers called 'Investing in Volunteers'. The Investing in Volunteers Award [IiV] enables organisations to review their volunteer management, and publicly to demonstrate their commitment to volunteering. The process of accreditation to the "Investing in Volunteers" standard involves applying standards and indicators to an organisation's management of volunteers. An assessor visits the organisation to evaluate how practice is perceived and experienced within the organisation. The standards are broken down into four main areas of volunteer management:

- Planning for volunteer involvement
- Recruiting volunteers
- Selecting and matching volunteers
- Supporting and retaining volunteers

The Investing in Volunteers Award takes up to one year to complete and will possibly be most applicable to organisations that have a Volunteer Manager role and hence the capacity to undertake the work involved. VDS has secured funding from the Scottish Government through the Forum for Environmental Volunteering Activity (FEVA) to help meet the cost of "Investing in Volunteers" assessments for environmental volunteering organisations. This will enable small organisations to access an enhanced bursary, with larger organisations receiving a smaller bursary. It was launched in 2007 and will be available for three years.

Two interviewees commented that in their view the "Investing in Volunteers" award was more concerned with capturing data than improving practices. The larger organisations were either "Investing in Volunteers" accredited, were working towards it, or planning to gain accreditation. One larger organisation stated that they had considered it but had deliberately chosen not to as they knew that they did not have sufficient resources to meet the standards required. They also felt that the burden of monitoring associated with the "Investing in Volunteers" Award was not commensurate with the added value it provided – staff time would be better spent delivering services than generating reports.

### 3.2 Retaining Volunteers - The Influence of Positive Management

The retention of volunteers is difficult to analyse as a stand-alone topic as it is closely related to volunteer management. Research (Ellis *et al* 2003) has shown that retention of volunteers is “encouraged by management that is explicit, supportive and appreciative”.

An analysis of volunteer retention across “Home Start” Schemes showed that a volunteer’s induction into the organisation is critical for retention of the volunteer.

“This induction allows the volunteer to get a feel for the organisation and the type of activities which is involved. It also allows space to determine the level of commitment which volunteers can make...Organisations can also use this stage to assess the skills and experience of the volunteer and best match them to a role in the organisation – or counsel them into another role” (McCudden 2000).

None of the organisations in our sample have any effective method of gathering information on why volunteers leave, or where they went to when they left. Several organisations suggested that their core volunteers only ever left when dead or too physically infirm to continue volunteering. Several organisations have exit interview processes but these are difficult to implement because it is typical for volunteers to move on without much notice and once they have done so it is very difficult to make contact with them to ask them to complete an exit interview.

Particularly in cases where the volunteering activity is subject-specific or site-specific, for example undertaking biological surveys on a reserve, it was common for volunteers to be lost due to relocation of the volunteer. Several organisations in the sample reported that they only learned of volunteer relocations through the return of postal communications or through other volunteers in the same locality. This would appear to indicate that the strengths of the volunteer relationship with the host organisation is lower than their dedication to the activity.

More than one organisation stated that they often lost volunteers before the volunteer even starts because they do not have the resources to follow up on unsolicited enquiries for volunteering opportunities, or to place volunteers with suitable opportunities.

Some organisations have such flexible unstructured volunteering opportunities that it is possible for a volunteer to turn up and ‘volunteer for a day’ and never return. There is no way of tracing that volunteer or evaluating their experience.

Despite the acknowledged deficiencies in volunteer management in the natural heritage sector there is little evidence available that this affected retention rates for volunteers. This may partly be because the lack of information on why volunteers leave allows a level of ‘hidden’ dissatisfaction in volunteers. In the researchers’ view this is insufficient to explain the difference between the limited overall investment in volunteer management in the sector and the apparently high overall levels of volunteer retention.

The researchers have identified three factors that may limit the effect of any deficiencies in the quality of volunteer management:

- Many voluntary opportunities in the natural heritage sector require very little ‘hands-on’ management once initial training is undertaken.
- The strong alignment of volunteer motivations and the objectives of host organisations in the natural heritage sector may prevent volunteers from becoming demotivated.
- For most host organisations, the core group of volunteers are retired individuals from more affluent and better educated backgrounds. This may mean that these volunteers are better able to ‘self-manage’.

Cumulatively these factors may have the effect of countering the acknowledged deficiencies in volunteer management. Host organisations can still achieve their aims using volunteers even with deficiencies in management processes. For these reasons it is apparent that there may be little organisational motivation to significantly improve volunteer management in the natural heritage sector.

### **3.3 Evaluating the Volunteering Experience & the Impact of Volunteer Activity**

The interviews and literature review confirm that host organisations in the natural heritage sector maintain limited records of the contributions of volunteers, who was volunteering, what they did, how many hours they donated, when they left and why they left the organisation.

Evaluation of the volunteering experience and of the impact of the volunteer activity on the host organisation, on the environment, and on the community was similarly limited. Many volunteer managers work closely with volunteers over long periods of time and therefore gain considerable insight into the volunteer experience. However, in the researchers' view, this is insufficient as a form of evaluation.

Most organisations have some form of appraisal built in to the volunteer management process which acts as a form of evaluation of the volunteer experience. Appraisal provides an opportunity to review with the volunteer how they are getting on and what they are enjoying. However, volunteer managers find that volunteers have little interest in participating in this. It is not clear how organisations analyse insights from evaluation of volunteer experiences as part of improving the experience for the volunteer. It is similarly not clear how appraisals may be used to determine the impact of volunteering or provide evidence of the impact of volunteering on the host organisation's work. There are examples of externally-commissioned evaluations, but not as part of everyday management practice.

The "Volunteering Impact Assessment Toolkit" was developed by the Institute for Volunteering Research. It measures impacts across five areas - physical capital, human capital, economic capital, social capital and cultural capital - and within four key stakeholder groups – volunteers, host organisations, users/beneficiaries of services and the wider community. The Toolkit itself provides advice on research techniques and the analysis of data and provides a step-by-step process for carrying out the impact assessment. This has potential value for volunteer-involving organisations in the natural heritage, although recent research has found the concepts of 'user' and 'community' stakeholder groups to be of less relevance. For example, what may be more relevant for many volunteer-involving natural heritage organisations would be to capture the environmental impact, rather than the community impact of the work of volunteers.

The Volunteer Investment and Value Audit (VIVA) (Institute for Volunteering Research 2003) is designed to be a measurement tool that assesses the 'outputs' of volunteer programmes i.e. the value of volunteers' time in relation to the 'inputs' or the resources used to support the volunteers. It aims to provide a simple process to understand the scale and significance of voluntary work and the payback on an organisation's investment in supporting volunteers.

VIVA has been applied by many large and small charities and voluntary groups, it has been used in public sector and employer-supported volunteering, and it is approved by the National Centre for Volunteering in England. Some organisations have found the process of carrying out VIVA beneficial for:

- Developing more effective management information on volunteers
- Better strategic planning and development of volunteer programmes

- Cost-effectiveness and boosting investment in volunteers
- Increased recognition, recruitment and retention of volunteers
- Attracting external funding and improving accountability
- Public relations and promotion of the organisation

VIVA does not appear to have been adopted at all within volunteer-involving organisations in Scotland. Its emphasis on monetary value may reinforce a notion that volunteering is all about saving money, which is unpopular in Scotland. Organisations are generally more interested in evaluating why they have volunteers and the values and benefits which volunteering produces. VIVA does appear to be of limited use for this purpose.

### **3.4 Considering the Impact of the type of Host Organisation on Volunteer Recruitment and Retention**

Although the interviews and literature review allowed the researchers to gain an understanding of how volunteers were recruited, retained and managed in each organisation, the size of the sample, the complexity of practice and the variation between organisations that are otherwise similar in scale and organisational objectives mean that conclusions on the impact of the host organisation type require to be treated with some caution. The typologies presented below are approximate; any single organisation may exhibit features from more than one type.

#### **Small, membership based, enthusiast led**

There are a number of organisations in this sector that are relatively small in terms of income and staffing yet have a national remit, e.g. Buglife Scotland, the Bat Conservation Trust. In these organisations there may be little practical difference between volunteers and paid staff. In fact volunteers may have better-developed skills, knowledge and confidence than staff. What staff contribute may be consistency of representation in partnership activity, more time and secretariat skills, and project management support to volunteers. Volunteering opportunities are likely to be limited by the capacity of the organisation to identify work opportunities and to provide management to newer and/or less skilled volunteers.

#### **Community-based**

Could be a generic community association or community organisation focused on environmental activity like Broughty Ferry Environmental Project. Smaller semi-autonomous branches of larger organisations can fall into this category. Although activity is undertaken on a voluntary basis by unpaid individuals, this cannot be treated in the same way as for individuals volunteering for non-local organisations. Recruitment, retention and management are less relevant in this model, as the nature of community-based volunteering is that people come together to undertake a collective activity more akin to focused, project-based community action. There is still a role for the organisation to act as 'hub' around which community activity can be organised and there is still a role for professional staff to provide community development support.

#### **Larger – natural heritage focused**

For these organisations the volunteer is a resource which may be essential to delivery of corporate objectives or just to allow the organisation to deliver more fully on its objectives than it could through paid staff alone. Volunteers may be seen as a way of sustaining activity when staff are unavailable. Volunteers are deployed in a variety of ways, primarily for practical tasks or for biological recording and monitoring surveys. The relationship may be co-dependent with the volunteer using the voluntary opportunities available through the

organisation to deepen their own skills and experience. Investment in recruitment and management of volunteers may have significant deficiencies, although the close alignment of the motivations of the volunteers and the objectives of the organisations can limit any negative effects from these deficiencies.

### **Larger – volunteer focused**

For the volunteer-focused organisation the provision of volunteering opportunities that benefit the volunteer is the *raison d'être* for the organisation. In these organisations the natural heritage acts as a resource to provide volunteering opportunities. There may be a commitment to the natural heritage in the form of a belief that exposure to the natural heritage is intrinsically beneficial to the volunteer. Volunteer motivations and benefits can be complex and multi-layered, including health improvement, social skills development, outdoor or 'wilderness' therapy and increasing employability.

These organisations are more likely to make extensive use of short-term volunteers, i.e. through participation on formal programmes like ProjectScotland. Investment in recruitment and management of volunteers may be better developed than in more heritage-focused organisations.

#### 4. CONCLUSIONS AND RECOMMENDATIONS

The Scottish Natural Heritage Policy Statement on Volunteering describes the SNH vision for volunteering as: “Through environmental volunteering, more people in Scotland will take positive action for the natural heritage, and in doing so will enjoy benefits to their quality of life and well-being.”

The balance of outcomes implied in this statement favours benefits to the natural heritage as a primary outcome, and benefits to the volunteers involved in delivering those natural heritage benefits as a secondary or “process” outcome. This corresponds closely with the balance of outcomes and the approach to volunteering that appears to be most common in the organisations that SNH works in partnership with and provides grant funding to.

The SNH statement of policy and priorities for volunteering in the natural heritage lists five outcomes that SNH will work with others to achieve:

1. Through volunteering more people take responsibility for the management of the natural heritage, particularly close to their homes or at Scotland’s special places.
2. Volunteering in the natural heritage contributes effectively to realising benefits for individuals, communities, and the natural heritage.
3. SNH offers high quality volunteering opportunities, both at National Nature Reserves and elsewhere.
4. People from all backgrounds take up volunteering opportunities.
5. Effective systems have been developed to support volunteering in the natural heritage.

The evidence from this research suggests that for many volunteer-involving organisations in the natural heritage sector supply of potential volunteers exceeds the availability of volunteer opportunities. This has some implications for the first key objective listed in the SNH Policy Statement under outcome 1 “develop more opportunities for volunteers to support the conservation of nationally and locally important landscapes and wildlife”.

If, as the interviews conducted for this research suggested, volunteer-involving organisations in the natural heritage sector have access to more volunteers than they can place with volunteering opportunities or can effectively manage, then increasing the number of volunteer opportunities will require some additional capacity in volunteer-involving organisations.

This study, along with previous research through the Scottish Government’s Environmental Volunteering Implementation Group and FEVA have found that capacity is limited by organisations’ ability to manage volunteers, rather than by any lack of potential activities for volunteers to undertake. A volunteer management development project, with input from FEVA, is taking this forward through a programme of training, support and capacity-building for volunteer managers.

- Recommend that systems are put in place to measure the impact of the volunteer management development project on the SNH objective to “develop more opportunities for volunteers to support the conservation of nationally and locally important landscapes and wildlife”.

A key objective for SNH under outcome 1 is to make information about volunteering opportunities widely available and accessible. This research found that formal volunteer recruitment strategies are virtually unheard of in the natural heritage sector. In addition to this, organisational marketing activity is rarely aligned with volunteer recruitment.

- Recommend that SNH consider producing guidance on effective volunteer recruitment specifically aimed at the natural heritage.
- Recommend that SNH consider, and consult with volunteer involving organisations, on the potential benefits of a single portal for recruitment to natural heritage volunteering.

This research found that there is little investment made in understanding and analysing the motivations of volunteers or in measuring the benefits to volunteers. This has implications for producing evidence to support outcome 2 (that volunteering contributes to realising benefits for individuals, communities, and the natural heritage). The research also found that for many existing volunteers the primary motivation for and benefit of volunteering is increased access to and enjoyment of the natural heritage. There is a chance that existing volunteers do not recognise the associated benefits of improved health and wellbeing and stronger communities. The feedback from natural heritage organisations on the Volunteer Impact Assessment Toolkit suggests that secondary benefits, i.e. those that are not directly concerned with the natural heritage are less relevant to existing volunteers. Capturing these benefits may have very different priorities for the different parties, including Government, the public sector, NGOs, and volunteers.

- Recommend that SNH further consult with volunteer-involving organisations in the natural heritage sector to establish how to support them to measure the full range of benefits arising from volunteering activity.
- Recommend that SNH review the results of the piloting of the Volunteer Impact Assessment toolkit to establish the strategic fit between the benefits measured by this toolkit and the benefits identified by volunteers and volunteer managers.

Outcome 4, that people from all backgrounds take up volunteering, may be challenged by the absence of hard evidence on who actually does volunteer in the natural heritage and the absence of systems in volunteer-involving organisation to record this. Developing evidence-based promotional activities to target and increase the uptake of volunteering opportunities for groups which face particular barriers will require better quality evidence on who is under-represented and what the barriers to their involvement actually are.

- Recommend that SNH seek to support and encourage volunteer-involving organisations to record, as a minimum, data on the age, gender, ethnicity and disability status of volunteers. There may be case for including this as a condition of grant.
- Recommend that natural heritage volunteer-involving organisations in receipt of public funding be supported by SNH in reviewing the profile of their existing volunteers to identify if people from any particular equalities group or socio-economic background are under-represented.
- Recommend that a macro-analysis of the data produced from the above is undertaken to identify if any particular groups are under-represented and produce conclusions on barriers to volunteering for particular groups.

Outcome 5 in the SNH statement of policy and priorities for volunteering in the natural heritage is concerned with the creation of effective systems to support volunteering in the natural heritage. This study highlights some significant deficiencies in volunteer management in the natural heritage sector. Importantly, these are acknowledged by most volunteer-involving organisations as requiring improvement.

- Recommend that an audit of training needs for volunteer managers in the natural heritage sector is conducted and that a national training programme is developed. It will be important to ensure that FEVA members are involved in both the audit and the development of the training programme.

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## APPENDIX 1: INTERVIEWS

This list presents those individuals and organisation interviewed as part of the evidence gathering:

### National Organisations

Royal Botanic Garden Edinburgh  
British Trust for Conservation Volunteers Scotland  
Royal Society for the Protection of Birds  
National Trust for Scotland  
Scottish Wildlife Trust  
The Forestry Commission  
Bat Conservation Trust  
Bug Life Scotland  
Community Woodlands Association  
Plantlife Scotland  
Forum for Environmental Volunteering  
Broughty Ferry Environmental Project  
Loch Lomond & the Trossachs National Park  
Cairngorms National Park  
Hidden Gardens  
BTCV Toryglen

Ruth Pool  
Russell Hampton  
Jonathan Osborne  
Violet Dalton  
Simon Milne  
Dominic Driver  
Anne Youngman  
Craig MacAdam  
Caron Hughes  
Suzanne Cooper  
Julia Duncan  
Ann Lolly  
Zoe Morris  
Claire Ross  
Linda MacDonald  
Abi Mordin

### Non Heritage Organisations

Children's Hospice Association Scotland  
NHS Lothian Voluntary Services  
Scottish Swimming  
National Museums Scotland  
CSV Scotland

Jacqui Rennie  
Diane Lockhart  
Eilidh McCall  
Deborah Wilson,  
Stan Sanderson

## **APPENDIX 2: THE BRIEFING PAPER AND FULL LIST OF QUESTIONS FOR INTERVIEWEES**

Note: This paper was sent to interviewees in advance of the interview to inform them of the background to the study and the topics to be discussed.

### **INVESTIGATING THE ROOTS OF INVOLVEMENT IN THE NATURAL HERITAGE:**

Marketing and motivation

Volunteer recruitment and retention in the natural heritage sector

Briefing Paper for Natural Heritage Organisations

Research conducted by Clear Plan on behalf of Scottish Natural Heritage

#### **Aims of the Research:**

The study will broaden understanding of what motivates people to volunteer in the natural heritage, looking specifically at how volunteers' expectations, aspirations, motivations, values and beliefs are taken into account by host bodies. The study will focus on how involvement in the natural heritage is stimulated and sustained. The research will improve understanding of the various routes into volunteering in the natural heritage sector, such as through membership, local branches, recruitment campaigns, training opportunities, publicity, mass-involvement initiatives.

The research will investigate the relevance of image / perception / branding of natural heritage volunteering and outline the main 'gateways' and 'barriers' to involvement as recognised by the sector. It will review and provide comment on the practice of host bodies on developing individual volunteers, for example through training or being given additional responsibilities.

## **KEY AREAS AND QUESTIONS FOR INTERVIEWS**

### **1. Volunteer Recruitment**

How do you market the organisation?

Is attracting and retaining volunteers integrated within marketing activity?

Do you have a volunteer recruitment strategy? If so, what does this include? If not, why not?

Is there any kind of Volunteer Recruitment Pack?

Do you target volunteer recruitment towards any particular groups?

What is the demographic of your volunteer profile?

### **2. Volunteer Activities and Volunteer Management**

Do you have a Volunteer Manager role in your organisation – if you have a variety of these how do they feed into the overall organisational structure.

If there are Volunteer Managers, how are they trained and supported to gain and improve skills in volunteer management.

Have you or do you plan to participate in Investing in Volunteers?

Could you describe the induction process for volunteers?

What sort of activities do volunteers undertake?

Are volunteers recruited to a particular role and are they given a role description?

What type of training is provided for volunteers?

Do volunteers sign an agreement of any kind?

Could you describe the supervision and support available to volunteers?

How do you ensure equality and diversity are managed to ensure there are no barriers to particular groups volunteering?

How do you manage risk in relation to volunteers?

Do you know how many hours a month on average your volunteers give to your organisation?

### 3. Volunteer Motivations and deepening the volunteer relationship

How do you know what motivates volunteers to approach and stay with your organisation?

How do you recognise and/or reward volunteers for their contribution?

In general – how do you seek to deepen the relationship with your volunteers (extend their volunteer involvement, encourage them to develop involvement across the organisation etc.)? Are there particular groups of volunteers seek to do this with?)

How long do volunteers stay with your organisation?

How do you know why volunteers leave?

What do you know about volunteer activities after they leave your organisation?

How do you gather feedback from volunteers about their volunteering experience?

What difference does having volunteers make to your organisation?

How would your organisation like to develop the role and involvement of volunteers in the future?

How will this be incorporated into any future branding/marketing work?

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