

# Museums of Cheshire

## Volunteer Training Toolkit

### *Project Management*



CO-ORDINATED BY:



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## Project Managing as a Volunteer

As volunteers it is important to remember how important your contributions are to museums, visitors and staff. When working on the development or delivery of a project it might be nice to know

- What the expectations are
- What your responsibilities are
- Where to be and when
- Your general job description or role

## Setting Goals and Objectives

Before starting your project or activity it is important to understand both the purpose and the desired outcomes of the activity. As a volunteer this is something you can discuss with your line manager. It might be good to know how your work fits into your museum's wider objectives. Your own motivations for volunteering are also important to consider. Some things to think about might include:

- What is the purpose of the event?
- Who will attend? (This is your main audience.)
- Is there a budget?
- What form will the event take? (talk, tour, activity etc.)
- Is the venue appropriate and cater for all needs?
- Do you need catering or refreshments?

Following these initial ideas, it might be useful to construct them in a briefing note:

## How to Write a Briefing Note

### What makes a good briefing note?

A well-written briefing note quickly provides an update on your event or activity. It should be:

- **Short:** One to two pages long. Use headings and sub-headings, lists, bulletpoints, and white space to make reading easy.
- **Clear:** Simple and to the point
- **Concise:** Every word is necessary and used efficiently. Include only the information that matters to the reader.
- **Complete:** The reader should not have to come back to you with questions. If there is information missing, point it out.
- **Correct:** Make sure that your facts are correct. Don't make assumptions.

## What should be included in your briefing?

The following points are also required in many briefings. Remember, just use the ones that you need.

- **Background:** Why is this event happening? Is there a specific gap or objective that it is addressing?
- **Current Status:** How the activity or event fits into the museums wider objectives or programmes.
- **Key Considerations:** Are there any important factors to consider such as costs, risks or resources (including relying on staff time to help facilitate your event or activity)
- **Next Steps or Options:** Your thoughts and observations on the key considerations, along with a concise description of the options, pros and cons, or simply what will happen next.
- **Conclusions and/or Recommendations:** Summarise the essential elements of what the reader needs to know. If you are making a recommendation, be sure that it is clear, direct, and is the best advice that you can offer.

## Getting Organised

Once you have collated your ideas in a briefing note it might be helpful to formally organise your ideas into an event planning worksheet. This will help you categorise the different aspects of the project, set deadlines and monitor your progress.

This sort of timetable is helpful for larger or more complicated events and activities.

The example provided is aimed at more corporate events, but you can still adapt the principle to museum-based events.

# Event Planning Worksheet

Event name:									
Event date:									
Task	Status	Budget	Actual Cost	  	Comments	Due Date	Assigned		
<b>Initial Details</b>									
Develop event theme									
Develop colors									
Set up committee									
<b>Budget</b>									
Identified in needs analysis									
Discuss with accounting									
Submit for final approval									
<b>Venue</b>									
Identify three options									
Visit two options									
Sign contract									
<b>Agenda</b>									
First draft									
Second draft									
Third draft									
<b>Marketing and Promotion</b>									
E-mail campaign									
Telephone campaign									
Mailouts									
<b>Swag Bags/Gifts</b>									
Bags ordered									
Items received									
Bags filled									

## About the (GYR) Column

GYR borrows from project management symbols and the green-yellow-red lights of a traffic signal. **Green** means that this task is on track and will be completed on time and budget. **Yellow** means caution: there is a risk that this task will be delayed or over budget. **Red** means that the task is way off track.

As the event planner, your job is to keep everything green. When they do go yellow, you must do what's needed to get things back on track. When things go red, they're serious. You must react immediately to return the task back to a green state. When things go to yellow or red you will probably need to speak with your line manager so that you can strategise a plan.

## Working With Others

Now that you know what you are looking at in terms of preparing for this event, you probably have a good sense of how much work you have to do.

You may be working alongside a line manager at your museum or with other volunteers. It might be useful to have a list of the people you can turn to for various things. For example, knowing who to ask to get access to rooms, for additional resources or marketing your event.

If you are not in a leadership position, you may be thinking that you don't have anyone that you can delegate to, but that's often not the case. In complementary work teams, we can also delegate laterally to a colleague who has a particular expertise, who is looking for some skill development, or simply has some extra time.

Work with others to tailor your work to your strengths or to allow you to work on new skills. Similarly let others take on tasks which suit them most. Remember that delegating does not mean that you give away work completely.

In *The Creative Edge*, author William C. Miller defines five levels of delegation:

- **Tell:** "Based on my decision, here's what I want you to do."
- **Sell:** "Based on my decision, here's what I want you to do, because..."
- **Consult:** "Before I make a decision, I want your input."
- **Participate:** "We need to make a decision together."
- **Delegate:** "You make a decision."

You must find ways to delegate, no matter what your position is. Clearly define each individual's roles and ensure delegation is fair and agreed upon. Make sure your communication is clear so that your colleagues know what your expectations are. Also make sure that you communicate any limitations to the assignment, such as budget, time, or other resources.

There are five steps to the delegation process:



## Connecting with Partners and Sponsors

### Benefits of Support

Let's look at some additional places that you can gather support for your event. Partners and sponsors can help you share the costs of an event, promote your event, and assist with providing committee members and/or volunteers.

Your museum probably already works with many different partners and organisations. You might want to talk to your line manager about the possibility of working with these when organising your event or activity.

### Partners

A partner is often another organisation who wants to be a part of your event.

Partners may offer you something you can't provide yourself or they may be able to give you a boost. This may be through funding, marketing or skills.

It is important to acknowledge your partners through marketing, social media posts, telling visitors about them or handing out their merchandise. Whatever route you take, it is important that visitors see the presence of the partner relationship.

### Sponsors

A sponsor may be at the event or may simply offer to pay for part of it. One common example is to ask sponsors to pay for a refreshment break during the day. When visitors go to the refreshment area, a large sign can be placed there informing everyone who the sponsor is. Another example: during golf tournaments, a sponsor may have a sign placed at the tee area.

Sponsors may also agree to donate some kind of gift, take-away item, or swag (like a coupon) which is placed into each delegate's bag. Or, perhaps their logo is printed inside the programme.

## Getting the Word Out

Visitors are incredibly important to museums. They drive so much of the work done by museums.

You don't need to harass your potential visitors, but you want to let them know what is happening. Use different approaches to reach people, some will read e-mails if they are on a mailing list, some will connect to you through a website, and others will read a glossy brochure that is addressed to them. Social media is also a key tool for reaching wider audiences.

If you are planning a large social type of gathering (such as a long service anniversary or retirement) that visitors attend for no charge, you can sometimes get away with as few as three touches (see below). For other events, such as a conference where visitors pay a fee and attendance is not mandatory, you may need eight to twelve touches.

## The "Touch" Factor

Each communication with a person (touch) does not have to be a lot of work. What's important is to communicate with people in a way they will respond to. Given how different people are, that means you've got to get creative. Here are some ways that you can promote your event to existing visitors:

- Find out from your line manager if you can include your event or activities in the what's on guide, website or social media posts
- If the museum has a mailing list of social media presence, see if you can look at the analytics to examine what sort of people the information is reaching
- Specific posters or flyers around the museum
- Ask other partners or groups to advertise your event or activity

Essentially you want to communicate as often as you can afford and in the best way possible. If you can, ask other people in similar roles what they have done to reach as many visitors as possible. Make sure that your marketing plan communicates with people frequently, at appropriate times, and without becoming annoying.

This can continue during the event as well through social media. Live tweeting can make your event interactive and memorable as well as reminding people who didn't make it what they are missing out on.

## On the Day

The events that you plan have to be memorable and meaningful to your visitors, particularly if you want them to use your service in the future. One way to create the ambience that you want is to build an atmosphere of service. Service puts your customers first. It must be a philosophy that is shared by you and every person who is involved in this event.

The best way to build a service culture is to create it. Provide committee members, volunteers, and especially your event day people with an orientation about how the energy of the event needs to be perceived by all participants.

Think Space! First impressions are important and museums always strive to give their visitors a warm welcome. Think about the spaces you use or will use for future events or activities and consider if they can be adapted to be more friendly and welcoming. You might consider:

- Is it easy to find and is it well sign posted
- Are visitors who didn't know about your event able to find you
- Is there enough space for your visitors to easily circulate and be greeted
- Is it accessible for all the needs of your visitor
- Can staff members or fellow volunteers help you to access the spaces you have to ensure they are appropriate or can be improved

## Celebrating Diversity

We pay plenty of attention to diversity at work and we have to do the same when it comes to event planning.

Respecting diversity is an essential element of interpersonal relations and cross-cultural relationships. The goal of a diverse organisation is to include people of all backgrounds and not to restrict anyone's opportunities to participate, grow, and succeed. Diversity is protected by law in some (but not all) countries.

As we become more understanding about diversity, the following areas are those that we most often pay attention to:

- Race
- Gender
- Religion
- Age
- Cultural background (ethnicity)
- Abilities and disabilities
- Marital status

- Family status (families with and without children, single parents, caring for aging parents)
- Appearance (style of dress, hair, body size)

When you are responsible for event planning, you must be inclusive to ensure that everyone who attends will feel equally welcome.

## Gathering Feedback

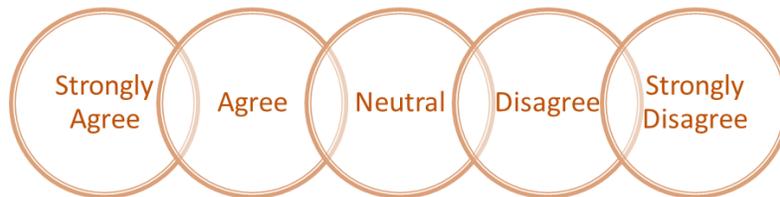
Feedback is an essential part of your event. It can be done on several levels. When you gauge people’s reaction to an event, you are getting their initial thoughts on how much they liked what they experienced. While that won’t really tell you what they learned, it is essential that they enjoy the experience if they are going to engage.

There are several formats that event planners use to evaluate their corporate events.

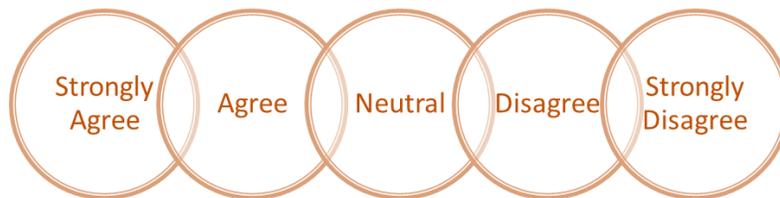
## Quick Response

At the end of each session in the event, you can include a continuum that asks participants to quickly rate the segment. This gives you feedback on the elements that you want to measure. You can do this in terms of “smiles” on the page, or a rating like the one below.

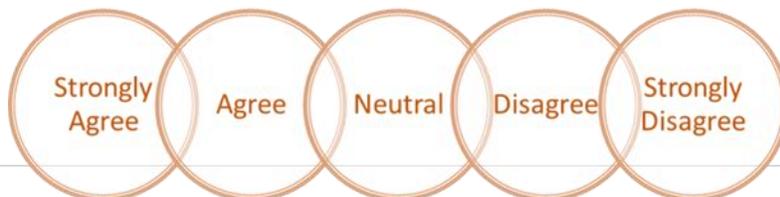
**The room was very comfortable during this session.**



**The activities were engaging for children**



**This session taught me something new**



## Formal Survey

For a more formal analysis, you can create a form with a few more details. Here is an example from a training workshop.

Course: \_\_\_\_\_

Date: \_\_\_\_\_

Instructor: \_\_\_\_\_

**PLEASE INDICATE YOUR CHOICE WITH AN X:**

1. Strongly agree
2. Agree
3. Not sure
4. Disagree
5. Strongly disagree

QUESTIONS	1	2	3	4	5	N/A
The materials were clear and easy to read.						
The transparencies and/or videos reinforced the course content.						
The hands-on scenarios helped you understand the course content.						
The instructor was prepared and knowledgeable.						
The instructor was gave clear instructions and answers.						
The instructor held your interest through the training course.						
The classroom facilities were clean and comfortable.						
You had enough time to finish each activity.						
The training course taught you what you wanted to learn.						
You would send others to Acme Training.						

**Suggested Improvements**

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