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Emeritus Faculty and Alumni as Volunteers in a University Archives: Planning for Success

Tamar Chute

INTRODUCTION

Archivists use volunteers to arrange and describe collections, help with events and donor relations, and assist with reference activities. Volunteers may also work on projects outside the archives, such as oral histories, fundraising, or designing and creating web pages. They are usually enthusiastic and eager to help, and they can be a valuable addition to the archives staff. Volunteers may range from children to retirees, from novices to professionals with archival experience. Regardless of their age or level of knowledge, volunteers require supervision, detailed instructions, and often much patience.

University archivists looking for volunteers hope to find individuals within the community who are interested in the history of the university and in its preservation. At the Ohio State University (OSU) Archives, emeritus faculty and, more recently, alumni have been frequent volunteers, in part because they enjoy giving back to the university. Donating their time, instead of or in addition to a financial donation, is a logical

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choice. These two types of volunteers have important strengths and present special challenges. Some of these strengths and challenges may be similar to those associated with other types of volunteers in other types of repositories. Age-related concerns, for example, are equally relevant for historical societies and associations that use elderly members as volunteers, and for the business archives that welcomes retirees back to assist in organizing the records they created.

While several articles and book chapters within the archival literature provide useful advice about working with volunteers in general, as well as in relation to specific projects, no study to date has examined the potential challenges the university archivist may encounter as part of an ongoing volunteer program. This article will discuss such a program at the OSU Archives, with special attention to the particular advantages and challenges of using emeritus faculty and alumni as volunteers.²

² Several contributions to archival literature have outlined best practices for recruiting, using, and keeping volunteers, and the benefits of using volunteers are well documented. Audray Bateman Randle, in her chapter in *Advocating Archives: An Introduction to Public Relations for Archivists*, noted that “volunteers are not miracle workers, but they can be a means of accomplishing work far beyond the scope of the staff.” See Audray Bateman Randle, “Volunteers and Friends: Recruitment, Management, and Satisfaction” in *Advocating Archives: An Introduction to Public Relations for Archivists*, ed. Elsie Freeman Finch, 84 (Metuchen, NJ: Society of American Archivists and Scarecrow Press, 1994). Susan Ewing echoed this sentiment in her case study about using volunteers at the National Air and Space Museum when she remarked that it was “gratifying to see work proceeding on certain major projects that simply cannot be performed by regular staff in the course of normal operations.” See Susan E. Ewing, “Using Volunteers for Special-Project Staffing at the National Air and Space Museum Archives,” *American Archivist* 54 (Spring 1991): 183. Other case studies have explained the advantages of using volunteers for special projects, especially during times of budget constraints. See Anne F. Roberts, “Volunteers and Reference Services with a Special Collection,” *Reference Librarian* 33 (1991): 207-9; and Jason Vaughan and Penny Whitten, “Community Service Volunteers in a University Library,” *Library Administration & Management* 15, no. 2 (Spring 2001): 91-7. Some archivists have emphasized that volunteers should be used with caution. Thomas Wilsted and William Nolte, in their book *Managing Archival and Manuscript Repositories*, asserted that archivists as “managers need to ensure that volunteers and interns result in a ‘profit’ to the institution, that is, that the investment in their training does not exceed the benefit the institution
SKILLS AND EXPERTISE

Emeritus faculty can be effective volunteers for several reasons. They are well informed about the university, and in some cases they created the materials they are identifying or know the individual whose papers they are processing. Similarly, alumni also have a wide range of talents that can benefit the archives. Like emeritus faculty members, they are familiar with the history, culture, and locations that define the university. They are dedicated to their alma mater and receive frequent appeals to give back financially or otherwise to the institution. Alumni volunteers can range from recent graduates to those who are retired from their chosen profession.

At the OSU Archives, the staff has made use of this knowledge when assigning activities to its volunteers. For example, the former director of the Department of Photography and Cinema brought in his own equipment to examine old university films and identify their subjects, lengths, and quality. In addition, this volunteer has worked with patrons wishing to view a film before purchasing a copy. The archives does not have a film projector, and the patrons would have been unable to view the films without this volunteer's help. Other volunteers have used their experiences on campus to help identify the time period of undated photographs or manuscripts. One volunteer working with photographs identified several former faculty members among a group of unlabeled photographs, allowing the photo archivist to preserve them instead of discard them as unidentified images.

In addition to their subject expertise, emeritus faculty members and alumni who volunteer tend to be very dedicated to the life and mission of the university. Faculty volunteers often have taught at the university for many years, while alumni...
have fond campus memories, and both feel personally con­
nected to the work that they do in the archives. Consequently,
these volunteers are more committed than other volunteers
might be to fulfilling their promises to finish projects or to vol­
unteer a certain amount of time.

**Health Concerns**

Although emeritus faculty members and alumni can
make significant contributions to the archives, archivists must
be aware of certain issues that may limit their effectiveness. At
the top of this list are the uncertainties associated with their
health. Health problems are often, but not necessarily, associ­
ated with advancing age.

An example will help to illustrate this point. An emeri­
tus professor from the Department of Agriculture had been the
most self-sufficient volunteer at the OSU Archives. During his
time as a volunteer, he had processed faculty papers and writ­
ten some excellent finding aids. When the volunteer became
sick, he was determined to continue to work on the collection
he had begun a few weeks before—the papers of the head of the
Agricultural Extension Service. As the volunteer’s health deter­
rilated, however, the archives staff began to worry about his
driving ability, his coherence, and his work with the collection.

After the volunteer had finished processing the collect­
ion, a staff member reviewed his work, noticed a few errors in
the finding aid, and asked a student employee to examine the
collection and finding aid more carefully. In the meantime,
the volunteer stopped coming to the archives because he could
no longer see well enough to drive. Investigating further, the
staff found that the volunteer’s declining health included men­
tal lapses, which precluded him from continuing his work for
the archives. The student who looked over the Extension Ser­
vice collection identified many problems with it, including in­
correct dates, mislabeled folders, improperly arranged materi­
als, and rusty paperclips that had not been removed. The col­
lection had to be reprocessed before it could be opened for re­
search.

To monitor these situations more closely and catch
problems earlier, the archivist should check the boxes being
processed by volunteers more frequently than they might if
students or staff were processing the collection. It is not suffi­
cient to check the boxes only before they go back to the stacks or when the volunteer asks a question. Based on past experience, the OSU staff now looks at any volunteer’s work at least once during each day the volunteer is at the archives. This practice has helped both the staff and the volunteers, who can then modify their future work so that it matches any changes made by the staff.

Several practices can help to address the concerns and risks associated with a volunteer’s health. The archivist must determine whether or not the volunteer can mentally and physically accomplish the tasks to be done. The archives staff must pay close attention to changes in a volunteer’s health and well-being and should ask questions if anything appears to be wrong. OSU requires that all volunteers complete an emergency contact form (see Appendix 1). This document will be vital if the archives staff ever needs to contact the volunteer’s family during a health emergency. Although health emergencies are more of a concern for older volunteers, such emergency forms are important for volunteers of any age.

Archivists should not be afraid to ask appropriate questions about a volunteer’s health and to ask for contact information. If health-related issues begin to affect the volunteer’s work, archivists must discuss these concerns with the volunteer and decide whether he or she should continue to work at the archives. Asking these questions can be awkward, especially if the volunteer has been at the archives for a long time. However, the archivist must balance personal feelings toward the volunteer with the good of the archives.

Older individuals can be wonderful volunteers, and the archives can benefit from their help, but at some point declining health may necessitate an end to their work in the archives. Archivists should look at each situation individually to determine if the volunteer can do any other types of work, perhaps even from home. Volunteers who can no longer process collections may be able to re-sleeve photographs or read the newspaper to find important university-related articles to be clipped. In such cases, the project should be of short duration, and the archivist should frequently evaluate the work that is done. If the work is no longer satisfactory, the archivist must end the project, making sure to thank the volunteer for the valuable
service provided and explaining that there are no other projects that the volunteer can do.

**Technological Challenges**

While monitoring health can be the most serious issue with older volunteers, relative unfamiliarity with technology may also limit their effectiveness. Until recently, only a few of the OSU Archives’ volunteers had used computers. As more and more of the work in archives is done on computers, however, more volunteers can and will expect to use them in their work. Gaps between a volunteer’s experience and the technology used at the archives can lead to frustration for both the archivist and the volunteer.

For example, one of OSU’s volunteers was assigned the task of creating abstracts for some of the oral histories in the archives. When he first began, the volunteer asked to use a computer in order to more efficiently create the abstracts. The request seemed logical, and he began to use the computer in one of the archives’ workrooms. As time went on, however, it became apparent that he was unable to complete basic computing tasks, such as saving a new file. A few weeks later, he accidentally deleted a seven-page document. Fortunately, the library’s information technology department was able to retrieve most of the document from the backup tapes.

Although in some cases additional training may be helpful, in this case the volunteer felt that he was knowledgeable about using computers and therefore resisted efforts to provide him with additional training. The best solution in this particular situation was to change the process for creating the abstracts. New documents are now created in advance, so that when the volunteer begins the next abstract, he does not have to create a file himself. Although this procedure is more time-consuming for the staff, the archivist and the volunteer are now more comfortable with both the atmosphere and the computer work that is being done.

The technological expertise of alumni, in particular, can vary significantly from one to another. The archivist must expect this diversity among alumni and try to coordinate the archives’ needs with the volunteers’ experience and skills. One of the OSU Archives’ alumni volunteers, during his first day at
the archives, announced that he did not know what to do with a computer and would not even attempt to learn to use one.

The OSU Archives’ staff appreciated his honesty and arranged his work so that he could write the finding aids by hand for a student to transcribe into an electronic format. In contrast, a volunteer in another special collection with computer programming experience converted an old database into a new and user-friendly format. Patrons are now able to access the information with minimal help from the curator, saving her time and resources. Technically savvy volunteers can help the archives work on technology-based projects that could not be attempted otherwise, either because the archives staff lacks the necessary expertise or because sufficient resources are not available.

The archivist must analyze each volunteer’s skills to determine his or her level of proficiency and comfort with computers. Individuals who claim to have been “using a computer for years” may be prone to exaggeration or may not want to admit that they have never really used one at all. Regardless of a volunteer’s skill level, the archivist should ensure that work on the computer is backed up regularly. In addition, the archivist should assess the computer skills of volunteers firsthand, whether they involve simple word processing or more complicated work on websites or databases. The OSU Archives has developed an assessment to gauge a volunteer’s computer skills that will be a part of all future volunteer orientations (see Appendix 2). The archivist uses the test to determine what type of project should be given to the volunteer. If the volunteer cannot complete the tasks on the computer, the archivist will assign a non-technical project.

**A Room of Their Own**

In a chapter addressing the management of volunteers, Audray Bateman Randle has asserted that a “volunteer must have a reserved work space.” Volunteers of all kinds like to have a familiar work area and a space or shelf for their projects whenever they are at the archives. A designated space is particularly important to emeritus faculty volunteers. Emeritus faculty members are accustomed to having their own space at the university, including a desk, storage area, and a telephone.

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3 Randle, 86.
In addition, emeritus faculty are not used to sharing space with students. These expectations are different from those of other volunteers who have not had an office at the university and who therefore are not likely to expect to have one as a volunteer.

Space is often tight within an archives, however, and it may not be possible to provide volunteers with places of their own. The flexibility necessitated by space constraints can be difficult when a volunteer thinks that one specific computer or area is reserved, personal work space. For example, one of the OSU Archives' volunteers was very unhappy when he was moved to another computer, especially because he was moved for a student. He felt that relocating to allow the student to use "his" computer was an imposition, and he complained both about having to move and about having to use the type of computer that was in the new space. The volunteer moved to a room with several computers, where he could always use the same one. This solution permitted him to have his own space without impeding the work of others. Archivists should anticipate these types of problems and try to find a space and a computer that the volunteer can use from the beginning of the project to the end.

**Time Away**

Ronda Huber Frevert, in her article "Archives Volunteers: Worth the Effort?" noted that "volunteers will also work fewer hours[,] requiring more time to reacquaint themselves with a project after being away for a week or a few days."

This observation is especially true for emeritus faculty volunteers who may be absent when they give guest lectures in their department, attend meetings of professional organizations, or take long vacations. While their absences are not necessarily a problem, remembering what to do when they return can be. Volunteers can more easily return to a project if they have detailed instructions outlining the necessary steps. Such guidelines are especially helpful to a volunteer who has been gone for several weeks. At OSU, volunteers refer to their written instructions regularly, which means the archives staff members spend less

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4 Frevert, 151.
time answering routine questions and more time monitoring the quality of the work done.

**Volunteering as Giving**

Unlike emeritus faculty, alumni usually were not employed by the university, and they are used to having their gifts to the institution recognized. The archivist must set clear expectations regarding the roles of alumni volunteers in the archives and their gifts of time or resources. Alumni may have received public recognition and even perks, such as access to sporting events, in recognition of past donations. Volunteer guidelines should state that all of the work done by the volunteer on behalf of the archives remains the property of the university and state explicitly whether the volunteer’s donation of time or resources will be considered a gift-in-kind. Clear communication can help avert misunderstandings between the archives and the volunteer.

A recent alumni volunteer’s work with the OSU Archives’ oral history project illustrates how such a misunderstanding might occur and how it might then impact the work itself. The interviewers for the project were emeritus faculty and alumni volunteers. The interviews were captured as analog sound recordings and then transcribed. One volunteer interviewer asked whether he might record interviews as digital video to take advantage of the possibilities offered by this new technology. He offered to donate the necessary equipment. The final product would include a DVD, a videotape, and a transcript.

As Frevert wrote, the archivist must distinguish between ideas, good and bad, and “must be ready to deal with both types of ideas by being open to accepting new ideas and ready to redirect the impractical ones.” Capturing the oral history by using digital video promised to enhance the final product. The video recording would allow researchers to see as well as hear the interviewee as he spoke about his experiences. The viewer could skip to different “chapters” with the DVD, an option not available on traditional video. The faculty member chosen for the first video interview had a long career at OSU, first as a student and football player and subsequently teaching com-

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5 Frevert, 149.
puter art and design. He was a logical choice for the video project because his art could be shown as he discussed his work. The oral history had the potential to be of great interest to various audiences.

Because he had invested time and resources, the volunteer expected the archives to invest additional resources in the project. The items he wanted the archives to purchase—a green screen to be placed behind the interviewee, a cloth for the table so it did not show up in the picture, and an expensive software package that made the video transfer process easier—were unexpected expenses. The archives agreed to purchase the screen and the cloth, but decided that the software package was too expensive. The volunteer then wanted to eliminate background noise at the archives by placing sound barriers around the interview room and to add music and photographs of the campus to the production. The staff agreed to give him reproductions of historic photographs, but could not find a cost-effective solution to the background noise problem. As the complexity of the project grew and as the amount of equipment used and the number of people involved increased, the project became larger than the interview itself.

Because of his personal investments of money and time and because of the growing scope of the project, the alumnus expected certain kinds of recognition from the university. He asked for an interview with the president and for official acknowledgement as an important donor to the university. He requested that there be a kick-off celebration for the new DVD, which he described as a marketing campaign for the project. This kick-off became a showcase for the volunteer, not the interviewee or the archives. The volunteer thought that he controlled the project and could direct the next steps. Because the volunteer's personal goals no longer fit well with the archives' goals for the project, the archives staff decided not to assign him another oral history interview. Although this diminished the number of volunteers working in the oral history program, it brought control back to the archives.

**Creating Guidelines for Volunteers**

In her article, Frevert pointed out that "while it is important to take a volunteer's interests and desires into account when assigning a task, it is equally, if not more, important to
remember . . . that volunteers are used to get something done that the archives needs done, not what the volunteer wants to do.” In order to clarify the role of volunteers in the archives, the OSU Archives created volunteer guidelines and now reviews them with every new volunteer (see Appendix 3). These guidelines stress the importance of the work done by the volunteer and the archives’ expectations regarding that work. They emphasize that the volunteer’s project should be related to the larger goals of the archives. By listing the types of projects generally done by volunteers, they indicate that the archives has already identified work that needs to be done and invited volunteers to join in that work. The guidelines also manage volunteer expectations regarding recognition by stating that volunteering will not be considered a gift-in-kind donation to the university. Working for the archives will not help the volunteer to get tickets to football games, other jobs and/or contracts with the university, or an audience with the president. It is essential that the volunteer does not have unrealistic expectations of the archivist or the archives.

OSU’s guidelines also establish certain policies for work done by volunteers. As Ann Pederson has noted, there must be “a clear understanding that all products, resources[,] and funds generated by volunteer labour are the property of the archives to be managed and administered according to its requirements.” The DVD produced during the oral history project, for example, is the property of the OSU Archives, not the volunteer, regardless of the magnitude of the volunteer’s contributions of time and equipment. Volunteers must also recognize that they are to abide by the same rules as all patrons and the permanent staff. They cannot receive special treatment, such as taking manuscript or photographic material home to work on later. The archivist must not bend the rules to suit the volunteer. Volunteers should not get special treatment that will harm the collection or the archives in any way.

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6 Frevert, 154.

7 Pederson, 344.

8 Wilsted and Nolte, 43.
CONCLUSION

Both emeritus faculty members and alumni can use their skills as volunteers to assist the archives in many ways. These include processing, photograph identification, and computer work. Archivists should remember to acknowledge their volunteers’ help, include them in informal archives occasions, and genuinely thank them for their assistance. Archivists also need to explain to volunteers how their work fits into the larger scheme of the archives—how the project will help patrons find materials or use collections that were inaccessible before, or how important aspects of university life will be lost without their help.

Many of the challenges inherent in using emeritus faculty and alumni as volunteers can be minimized by incorporating certain practices and procedures into a volunteer program. Persons interested in volunteering should receive a standard set of volunteer guidelines that describe the kinds of volunteer work available and that specify whether the volunteer work will be considered a gift-in-kind donation. Before they start work, all volunteers should provide information about themselves, including any restrictions on their activities and an emergency contact name and phone number. Volunteers should also be required to complete a computer skills assessment to determine whether they might need additional training or a different type of assignment.

The university archives' procedures should anticipate common difficulties. The archivist should be sensitive to the probability that volunteers will want a particular space of their own within the archives. Emeritus faculty members may also continue to have responsibilities in their departments that conflict with their volunteer hours. In addition, archives procedures should state that all volunteers' work will be reviewed after every visit. This ensures that any changes in the volunteer's health or competence are noticed immediately. If this occurs, the archivist should have a clear plan in place to help him or her negotiate the end of a volunteer's work in the archives.

Emeritus faculty and alumni bring significant expertise, interest, and enthusiasm to their volunteer work in the university's archives. Through their knowledge of the university and their commitment to the archives, they can help the archives tackle projects that would otherwise be impossible to
attempt. Planning, procedures, and patience will ensure that the volunteer's work is rewarding and productive for both the university archives and the volunteer.

**Tamar Chute** is currently the associate university archivist at the Ohio State University. She received a BA in history from the University of Michigan in 1996 and an MLS degree from the University of Maryland in 1998. At the OSU Archives, Tamar is responsible for accessioning collections, outreach activities, records management, and online reference. She also supervises staff, students, and volunteers.

**Appendix 1:**

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Appendix 2:

Computer Skills Analysis Sheet for Volunteers

In order to learn more about our volunteers’ computer skills, the university archives has created this short computer test. This assessment will allow us to match each volunteer with a project that fits his or her skills. The test will be done in the archives workroom on a staff computer. The archivist will monitor the efforts of the volunteer.

What types of computer work are you comfortable doing?

____ Word processing
____ Data entry into databases
____ Creation of databases, spreadsheets
____ Creation and modification of web pages
____ Other computer programming (please specify):

Part I. All Volunteers
1. Please create a new document in MSWord and save it to the disk provided by the archivist.
2. Please close the document and reopen it. Write a few sentences and save the document on the archives drive titled “W.”

Part II. Volunteers wishing to work with databases
1. Please open up the database “volunteers” on the archives drive “W.”
2. Enter your name, address, and telephone number into the database table.
3. Create a report of all the volunteers and print it.
4. Create a new database with information of your choosing. Create a short report.

Part III. Volunteers wishing to do web design
Please bring a sample of your work in print with an active link for the archivist to see.
Appendix 3:

Guidelines for Volunteers

The university archives serves as the official memory of the Ohio State University. The archives is divided into two areas: manuscripts and photographs. Each year the archives receives approximately 400 boxes of documents, photographs, scrapbooks, and artifacts from departments, faculty members, students, and alumni. Our goal is to make these materials accessible to researchers of every kind.

Types of work available:
Volunteers are essential to the success and growth of the archives. There are several kinds of projects that can be done by volunteers. These can include:

- Oral history: interviewing former faculty members or creating abstracts of interview transcripts
- Faculty papers, photographs, newspapers: organizing and creating inventories
- Digital projects: developing on-line exhibits
- Clerical work: typing, filing, photocopying, etc.

Benefits:
- “Paying Forward”— give back to your university and benefit future generations
- Meet and work with great staff and students
- Learn more about university history
- Flexible scheduling

Please note:
- Some positions may not always be available. The archives staff will work with volunteers to find projects that match their interests. If none are available, the archives staff will keep the potential volunteer’s name on file and notify him or her when a position becomes vacant. Volunteers must follow all university and archives staff policies.
- Volunteers work on a project basis. Although some projects will lead to others, this may not always be the case.
Appendix 3, continued:

- Work done for the archives is considered the property of the Ohio State University.
- Volunteering is not considered a gift-in-kind donation to the university.
- Some work must be done in the archives during the hours it is open: Monday through Friday from 8-5. Other work can be done either at the archives or in another location. Original material must remain in the archives at all times.

For more information, please contact the associate university archivist at 614-292-2409 or archives@osu.edu.