

Knowing What's Expected

Position Descriptions & Volunteer Agreements for Docents

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As a docent program grows, how can changes in training and touring expectations be incorporated without confusion or conflict? How can a docent program effectively clarify docent responsibilities and privileges and at the same time avoid misconceptions? If there are changes in staff, as well as changes in docent and staff roles, are they clear to all? In 1994, the Docent Coordinator and Docent Council at the Freer Gallery of Art and the Arthur M. Sackler Gallery, the two national museums of Asian art at the Smithsonian Institution, addressed these issues. The Docent Coordinator and Docent Council came up with an answer — create a position description and volunteer agreement for docents.

The docent's position description would contain some elements of a typical job description, clarifying the qualifications and responsibilities required for the job of volunteer docent, as well as listing the institutional privileges and staff support that docents would be able to expect. There would also be a separate voluntary agreement form, effective for one year, that both staff and docents would sign. Unlike a typical job description, this document would reflect the special relationship volunteers have with a museum. (We were aware that this could raise sensitive issues of roles and responsibilities both for staff and docents, since there had never been anything like it in the history of the docent program or the museum.)

A 9-Step Process

Working together from October 1994 through June 1995, the Docent Coordinator and Docent Council

created a position description and volunteer agreement in the following way:

1 *Defining the problem* is a crucial first step in developing a position description. What are the issues the document needs to address? If there are difficulties and sources of confusion affecting your organization, analyze how these came about and what the solutions might be. For example, our Freer and Sackler docent corps had grown tremendously over the years, and so had the needs and expectations of an expanded docent program. Problems seemed to stem from:

- a) training differences of new docent classes that led to differing expectations;
- b) change from a volunteer docent supervisor to a professional education department;
- c) growth in size of the group, mandating different management techniques;
- d) inequalities due to lack of clarity with respect to touring and training;
- e) lack of specifically expressed guidelines that would apply to everyone.

2 *Informing and discussing the idea of a position description with supervisors* and, if appropriate, members of the administration can circumvent misunderstanding later. Leaving supervisory staff in the dark can be a political minefield. By involving the administration, you gain their support and prevent future problems.

3 *Reviewing docent job descriptions from other institutions* can be a source of good ideas. After carefully

examining materials from Smithsonian and non-Smithsonian organizations, we developed a clearer idea of what would work best for our program.

4 *Developing ideas about what is needed and wanted helped us clarify our goals.*

A. We thought a position description should clarify *expectations* and define both staff and docent roles so that problems would be less likely to occur.

B. We decided the ability to *review* and *revise* on an annual basis was critical, since changes in leadership, finances, and programming can occur.

C. We wanted the position description and volunteer agreement to be sent to each docent *annually*, and to have a signed volunteer agreement form on an annual basis.

D. We wanted position descriptions for both *Active* and *Emeritus* docent status.

E. We needed to include a section that described docent *benefits* or *privileges*.

5 *Involving docents*, either the Docent Council or a leadership committee representing the docent body, can be tremendously helpful. In our case, the nine members of the 1994-95 Docent Council took on a leadership role in working with the Docent Coordinator, offering sound advice, resolving sensitive issues, and informing the docent corps of the progress of this project. At several docent meetings during the year, the position description and volunteer agreement were discussed, providing every docent the opportunity for questions, comments, and suggestions. Also a series of status letters



Bill Whalen, and other docents at the Freer and Sackler Galleries of the Smithsonian Institution, know what is expected of them and what privileges and support they are entitled to receive because they have a position description and volunteer agreement.
Photo: courtesy of Smithsonian Institution, ImaginAsia Program

was mailed to docents. Throughout the entire process, the docent corps felt they were being informed and their ideas solicited. This created strong support for the project, and there were no surprises when docents received the final document.

6 *Revising and modifying the original draft* as a result of discussions, comments, and editing by a docent leadership group is critical. Having a group such as the Docent Council reviewing the draft can help prevent problems later on. For example, two council members objected to the tone of our draft. One considered the draft to be like a "military manual;" the other objected to words that said "docents must ..." and thought it should be "docents have the right ...". Basing the draft on a typical job description, in which an employer tells an employee what to do, had resulted in a document that was too authoritarian. Museums and

docents have a different relationship, a special relationship based on volunteerism. The draft position description was revised, using warmer language and a warmer tone to reflect this special relationship. The ability of a museum staff member to see both sides of an issue can result in mutual respect and cooperation and fewer problems in the future.

7 *Sending the document for departmental, administrative, and legal review* is important at this point. Supervisors should be given the opportunity for review and the addition of comments. Legal counsel is advised. Our legal counsel suggested we use the term privileges, rather than benefits. He felt a docent job description is a valuable document and that every organization using volunteers should have one. This is especially important nowadays when lawsuits can be brought against an institution by a disgruntled volunteer.

Also, without a job description on hand, it is very difficult to "separate" a problem volunteer from the institution.

8 *Final revisions and a cover letter* are needed before sending out the document. In addition to final revisions, it is important to compose a cover letter, written in a warm and positive tone, to explain the rationale, process, and benefits of having the position description and volunteer agreement.

9 *Giving the position description and volunteer agreement to docents for signature* is the last step. In September 1995, each docent received a copy of the 1996 fiscal year position description and volunteer agreement for signature. Docents returned the signed volunteer agreements, which were placed in their files; a copy was given to each docent. There were no problems and no complaints. A number of docents wrote complimentary letters praising the position description and volunteer agreement.

Lessons Learned

One of the most crucial lessons we learned was how valuable it was for docents and staff to work together. Working together made docents a part of the change, and gave them the opportunity to express concerns and include points felt to be of importance. The Docent Council, representing the docent corps, suggested ideas that the staff had not considered, provided editorial comments, discussed and came to a consensus on sensitive items, and learned of the problems the staff faced in managing the program. The result was greater openness and

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