Workshop Session Digest: Volunteer recorders – motivation, retention and recruitment

All of the surveillance schemes in which the JNCC is a partner rely heavily on volunteer recorders who carry out surveys and submit their records to enable the schemes to monitor populations of wild animals and plants, and to produce official statistics, which influence many national environmental decisions. On 4th October 2018, as part of the annual UKTEPoP (UK Terrestrial Evidence Partnership of Partnerships) meeting, a workshop was held to explore the motivation, recruitment and retention of the volunteers that make it all possible. The aim was to identify key drivers and barriers, and to discuss and share solutions to improve retention and recruitment of volunteers.

Section 1 – Volunteer motivation

The workshop started with a discussion on what motivates people to volunteer. There was a general consensus that there is no overall picture of this captured in one place, even though a range of specific studies have been carried out over recent years.

Understanding motivation is a social science, which is an expertise that is largely lacking within the biological recording world. We need to better utilise the social science component on why people are motivated to volunteer, and how that can be applied to each of the recording schemes.

It was felt that work is needed to capture motivations of people that don't currently participate – those that do not engage with a scheme in the first place, and those that sign up but then do not submit any records. Understanding and addressing the reasons why these people do not get involved could be useful in improving volunteer recruitment and retention. Some of the surveillance schemes are already looking into motivation.

What do we know about volunteer motivations within each scheme?
Survey responses on motivations may not always represent people's true motivation. There is a difference between people's rationalised motivations and their true motivations. The former is often used to justify the latter.

Common motivators across the schemes include volunteers wanting to "do their bit", career development and employability, social, passion, personal development, and interest in particular species or field sites. Schemes also provide a means of legitimising the interest and enjoyment in, e.g. birdwatching, especially where the data they collect is being used to make decisions at policy level to further conservation objectives. Guilt can be a strong initial motivator/incentive, but it does not produce long-term commitment to a survey.

While recording for most schemes tends to be largely an individual activity, some schemes are more group based, providing added social motivation, which could be worth exploring in other schemes.

There are differences between audiences and there is no one solution that is right for all schemes. Even within schemes, the ability to tap into these differences could increase the overall amount of records submitted. Motivations for people to do a one-off record differ from motivations for multiple records (e.g. Atlas work compared with recording a monthly square) and so incorporating these two types of recording into a scheme may serve to increase data volume and/or area coverage. There was a discussion over whether from an analytical perspective, single site visits can be accepted, or is it 'the gold standard or nothing' for the monitoring schemes.

Questions to explore further:
- Comprehensive study of the reasons why volunteers participate in each of the schemes – what the real motivators are, do the motivators differ between schemes?
- How could schemes be modified to better exploit the identified motivators?
- How can we turn guilt into a positive motivator to encourage longer term engagement?
- What stops registered volunteers submitting survey reports? Is it that they don't carry out the survey, or is the barrier at the submission stage?
- How can we involve social scientists in plans to increase volunteer participation and engagement?

Section 2 – Managing and Maintaining Volunteer Network (barriers and strategies)

Maintaining the volunteer network is a key activity for all of the surveillance schemes. While there is some focus on understanding volunteer motivations, there is very little spontaneous feedback on the general "user experience" from volunteers that participate in the schemes. The groups were of the opinion that the schemes would benefit from systematic collation of volunteer views and opinions, especially by getting in touch with people that drop out (or register and not record) to discover the reasons. A routine "exit survey" of registered volunteers who do not submit records at the end of the season to gain a better understanding could benefit a number of schemes and is worth evaluating. The possibility that the turnover of surveyors could create a problem for data QA and analysis was also discussed.

The workshops identified a number of actual or potential barriers to taking part in surveys and discussed possible strategies to overcome these barriers.

1. Travelling time and distance
It was recognised that the distance a volunteer is willing to travel influences the likelihood that a particular square will be surveyed. Offering squares close to where the volunteer lives is a method employed by a number of schemes, but it does not help with surveillance in remote areas. Cost of travel and accommodation were identified as other potential barriers in addition to travel time. Some solutions to overcome these barriers were discussed, including contribution to expenses and encouraging/facilitating lift sharing.

2. Taxonomic knowledge as a specific potential barrier
One barrier often mentioned, but not quantified, is that people assume they need to be an expert before they can participate, and often do not feel confident of their skills. This was discussed at length, and many suggestions to overcome the barrier were put forward which are detailed below.

As increasingly fewer volunteers have extensive taxonomic skills, schemes have to adapt and either accept a different data standard or a reduction in the amount of data the scheme is able to collect. The implications of this to data quality and analyses were discussed. Should we try and stick with the "gold standard" of data collection or try to maximise volunteer engagement and participation – and thereby data collected - by offering a choice of surveys appropriate to each skill level.

As new analytical techniques are capable of analysing less structured datasets and data on different scales of detail, it is becoming possible to incorporate more of the records that are collected into trend analyses. The TSDA partnership is spear-heading this work. If it is analytically acceptable, stepping stone schemes could bring significant added value to any scheme, as an entry level scheme is often very useful in encouraging participation from those people who don't have the time or skills to do a full survey.

There was a lengthy discussion about training and incentives, with a consensus that it was important to develop and promote training schemes and/or mentoring within each recording scheme. Using incentives to motivate volunteers was also discussed with a range of ideas put forward, including rewards in the form of certificates or prizes, and making recording more of a group activity to offer the added incentive of social contact.

3. The importance of support to continued volunteer engagement
There was some discussion on the role of the regional co-ordinators – dynamic individuals who help maintain interests in the region and motivate more people to participate. Mentors would perform a comparable role on a one-to-one basis and help keep people enthused. There are already some examples that show how a community feel can benefit schemes.

We know that good regional representatives that provide high levels of contact and encouragement to volunteers at key times during the recording season tend to have a higher retention rate of volunteers. This may be to do with feeling valued and rewarded. Consequently, there could be a case for putting more investment into regional representatives.

While much of biological recording tends to be an individual activity, some schemes are more group based, providing more of a social motivation. Creating a community of recorders to support and motivate each other could serve to increase the volunteer's level of commitment. The temptation to stay at home is much greater if there is no pressure over letting other recorders down by pulling out at short notice.

4. Impact of changes to schemes – e.g. adoption of new technologies
There is some concern that volunteers don't like change. As schemes often need to meet new requirements or adapt methodologies to keep up with new technologies, it is inevitable that all schemes have to face change. The introduction of these changes needs to be managed carefully not to lose significant numbers of volunteers in the process.

5. Time - or lack thereof
As there are increasing demands on time, volunteers have to make choices. We need to make sure that volunteering is viewed as high enough priority to successfully compete for volunteer's time. Giving people the option to be involved at a lower level of effort may help to reduce drop-outs. It is recognised that people are reluctant to commit to volunteering in the long term as there is uncertainty over where they will be in 5 years' time. Potential ways of overcoming this were discussed, for example: making it easier to swap squares when you move, linking activities to health and well-being, performing efficiency analyses with volunteer effort and linking interests across taxonomic groups.

Taking part in surveys is frequently linked with retirement, and hence increased time availability. As age of retirement is going up, this may result in fewer 50+ taking part in recording schemes in the future. However, in the short-term, volunteer numbers are stable, or increasing in some schemes.

6. Importance of feedback
There was a general consensus that feedback is essential, and ways of how to deliver this were discussed. For example, timely feedback to volunteers is likely to improve retention rates; positive feedback makes individuals feel more valued.

Topics to explore further:
- Encourage every scheme to send an "exit survey" to volunteers if they stop submitting data to get a better understanding of barriers that could be overcome.

- Make best use of feedback opportunities - encourage all schemes to have a feedback mechanism the volunteers find useful and easy to engage with.
- Explore training schemes and opportunities to develop the volunteering network.
- Explore establishing regional representatives, mentors, and community concept within each scheme to increase retention and motivation.
- Devise ways to make the schemes stand out and make them more appealing for volunteers' available time.

Section 3 – Expanding the volunteer network

Expansion of coverage of any of the monitoring schemes would likely require identifying new groups of potential volunteers not yet engaged with the schemes in addition to finding ways to improve retention. The discussions concentrated on potential sources of new volunteers and ways to reach them.

Who to target?

The following groups were identified as potential sources of new volunteers:
- Photography clubs
- Other organisations outside the biological recording community, e.g. ramblers
- Naturalist/Ornithological Clubs
- Students
- RSPB Phoenix members (keen teenagers)
- Local wildlife groups.

Age groups to target?

The discussion in one group centred round the issue of the ageing volunteer base, and strategies to encourage more young volunteers to take part, although most of the strategies discussed are relevant to any age group. Recruitment of young volunteers was highlighted as a perennial problem since young people are deficit in money, time and experience. The general feeling was that targeting a younger demographic was more important if we want to expand survey coverage than to maintain current coverage.

How? – What channels to use?

As discussed above, consideration should be given to development of entry-level recording in each scheme (e.g. single species surveys, limited species range, or single habitat surveys) to get people started, and provide training/mentoring/group participation to develop skills and take the volunteers to more complicated surveys in time.

Means of recruitment that were suggested included social media, targeting publicity to the key groups identified, provision of "learning on the job" opportunities, embracing new recording technologies, and improve the visibility of the schemes on a highly publicised website.

The degree of competition for volunteers and collaboration between schemes was discussed, in particular, ways of maximising the volunteer value by sharing the resource, recruitment methods, partnerships with other organisations etc. It was recognised that co-ordination of such activities and where possible co-locating survey plots would be beneficial. Although TEPoP is beginning to tackle volunteer issues, there is much work to be done.

Topics to explore further:
- Explore development of a central website to direct people to individual schemes, and the means to publicise this.

- Development of an overall advertising leaflet for all schemes (this suggestion was very well received at the workshop).
- Devise and run single day surveys along the lines of the Big Butterfly Count and use them to recruit new volunteers.
- Making national schemes useful on a local level – and promoting this aspect
- Find out how organisations in other fields recruit, manage and retain their volunteers (e.g. National Trust and BTCV).