# THE UNIVERSITY *of* EDINBURGH

This thesis has been submitted in fulfilment of the requirements for a postgraduate degree (e.g. PhD, MPhil, DClinPsychol) at the University of Edinburgh. Please note the following terms and conditions of use:

**Strategic volunteer management planning and implementation in Scottish third sector organisations: understanding the volunteer psychological contract**


**Bing Wu Berberich**


**Thesis presented in fulfilment of the requirement of the degree of**

**Doctor of Philosophy**


**The University of Edinburgh**

**2015**

## Declaration

Except where specific reference is made to other sources, this is to certify that the work contained within has been composed by me and is entirely my own work. Not part of this thesis has been submitted for any other degree or professional qualification.

……………………………

Bing Wu Berberich

……………………………

Date

**Abstract:**

Third sector organisations (TSOs) have been operating in a turbulent environment of social, political and economic changes, presenting challenges to their continued activities. The volunteer workforce, as a key component of TSOs' human resource, has long been considered crucial for the sector. Despite this acknowledgement, existing research suggests that TSOs have not effectively managed and supported their volunteer workforce in order to sustain development. There are claims for TSOs to place volunteer management (VM) onto a strategic level, and it is considered crucial for TSO managers, CEOs and volunteer coordinators (VCs) to achieve sustainable organisational development through the strategic planning and implementation of VM practices. However, existing research has focussed more on articulating volunteer motives; and little attention has been paid to considering the ways in which individual perspectives influence effective VM. This study addressed the gap by exploring key players' (CEO, VC and volunteer) perceptions of the policies, practices and processes used to attract, engage and retain volunteers in small to medium Scottish TSOs. It aimed to provide insights into the importance of strategic VM in sustaining TSO performance and in understanding the crucial role of VCs, through unfolding the processes of making and fulfilling individual volunteer psychological contracts (VPCs).

Three case studies were carried out within three Scottish TSOs; in-depth qualitative interviews were conducted with participants occupying different roles, CEO (n=3), VC (n=5) and volunteers (n=16). Supplementary data were obtained through documentary study of VM policies and practices. Data collection was guided by a conceptual framework developed by embedding the Resource Based View (RBV) of HRM and HR devolution to the Line into the process of making and fulfilling the psychological contract. Results support the claim that TSOs would benefit from more strategic management of their volunteer workforce as a competitive resource. Examining VM through the lens of the VPC provided empirical evidence to confirm that it is crucial to engage and retain volunteers by shaping their expectations and motives within the TSO, and thus ensure more sustainable TSO performance. The results further support the salient role of VC as volunteer line manager, in attracting, engaging and retaining volunteers through effective VM implementation. In arriving at these results, this research has extended the theoretical debate on the importance of strategic HR management and the key role that line managers can play in achieving this beyond the more dominant private sector focus.

Words count: 74,549

# Table of Contents

## List of figures and tables displayed

## Appendices

## Abbreviations

CEO – Chief Executive Officer

CCT – Compulsory competition tendering

HRM – Human resource management

IHRM – international human resource management

IVR – Institute for Volunteering Research

MHRM – micro human resource management

NCVO – National Council of Voluntary Organisations

NPM – New Public Management

OSCR – Office of Scottish Charity Regulator

SCVO – Scottish Council of Voluntary Organisations

SHRM – strategic human resource management

TSO – Third Sector Organisation

TSRC – Third Sector Research Centre

VC – volunteer coordinator

VDS – Volunteer Development Scotland

VM – volunteer management

VPC – volunteer psychological contract

VOR – volunteer organisation relations

# Acknowledgements

This PhD has been a most challenging yet enlightening journey. Its outcomes are immense in terms of personal development, academic skills development and career prospects. The PhD has shaped my value and belief of the society, and the academic research and teaching, which enabled me to better understand the social reality from both philosophical and academic perspectives. Although it has not been a long-intended activity, I felt most fortunate to have embarked on this journey that has presented me a much better future, and the prospect of doing something that is far more meaningful and enjoyable.

Along this long and winding road, I am mostly grateful for the enormous support and guidance that my principal PhD supervisor, Prof. Wendy Loretto has given me. Not only did she help me throughout the past four years, she was also the one who encouraged me to start this life-changing PhD. Her advice and recognition were the best stimulus to my progress. My appreciation to her is beyond the expression of any words.

I also appreciate very much the support from my second supervisor, Prof. Stephen Osborne for his inspiration and guidance of my thesis and professional development in academic research. He has provided me many great opportunities in: connecting to other researchers and participating in different research activities. These invaluable experiences have greatly helped my professional development in academia. Both of my supervisors have been my role models, keeping me on the right direction and supporting my progress all along.

Also, a special thank you to my dear friend, Dr Mary Ann Julien for her patience and invaluable work of proofreading my thesis. I have learnt a great deal from her on improving my academic writing skills.

Furthermore, I cannot possibly have come this far without the love, understanding and support from my family: my beloved husband, my dear daughter and my caring parents. Without them, there would not be me with these achievements. I am forever thankful for them being with me and believing in me. Finally, I want to thank all my families, friends, and colleagues for their kindness, support and encouragement. This PhD marks a new beginning of my life; I am endeavouring to carry on my development through a lifelong learning.

# CHAPTER ONE: Development of the third sector and volunteer management

## 1.1 Overview of the research focus

With the focus on exploring how the volunteer management (VM) is conducted in Scottish third sector organisations (TSOs) (planning and implementing the VM policies and practices), this study intends to understand the impact on the TSO performance of the actual VM in attracting, engaging and retaining the volunteer workforce. The influence of institutional development, i.e. 'contract culture', financial recession and the welfare reform, make TSOs pay more attention to developing and retaining their workforce, including both paid employees and volunteers (Cunningham 2001). This thus leads to arguments whether or not it is necessary for TSOs to strategically manage their workforce in order to survive in the long term. There have been studies exploring how paid employees could be better managed and supported using HRM theories (e.g. Hay et al. 2001; Parry et al. 2005; Cunningham 2010). However, little attention has been paid to this with respect to volunteers, although their contribution has been recognised. Previous study findings acknowledge the complexity of volunteer behaviour at the workplace (e.g. Pearce 1993): this is considered as leading to more challenges for TSOs. Various volunteer management models and 'best practices' have been introduced by umbrella organisations such as National Council of Voluntary Organisations (NCVO) or Volunteer Development Scotland (VDS), but their actual implementation has not had a sufficiently positive impact on attracting and retaining volunteers (Gaskin 2003). Volunteers are particularly important for small to medium TSOs (the majority)[1]. Therefore, it is important to explore volunteer management (VM) from a strategic HRM perspective, in order for TSOs to better understand how volunteers could contribute to organisational development if they are effectively managed and supported.

This study focusses on volunteers at the operational level because majority of TSOs in the UK, small to medium TSOs in particular, largely rely on volunteers for their operations. Types of volunteering activities range from organisational and

professional support (e.g. administration, reception, book keeping and fundraising), to participation in core activities' (e.g. service delivery and service delivery support) (McSweeney and Alexander 1996). The notion of structurally managing and supporting volunteers within TSOs has existed since the 1960s, for example, the Ave Report of 1969 (mentioned in Smith 1996); but the need for VM has not been recognised by TSO managers until recently ( e.g. Baines 2004; M. Kim, Zhang, and Connaughton 2010; Studer and Schnurbein 2012; Bowman 2009; Taylor et al. 2006; Leonard, Onyx, and Hayward-Brown 2004; Farmer and Fedor 1999; Hustinx and Handy 2009). However, it is acknowledged that the level of volunteer involvement within a TSO varies depending on types of volunteering roles. For example, it is legally mandatory for TSOs to have a voluntary non-executive board (i.e. trustees). The board members are legally responsible for all aspects of the TSO's operation, in order to ensure there is no breach of charity law. These volunteers do not normally get involved in day to day TSO management operation; thus, their work has different impact on a TSO from volunteers in this study.

The last two decades have seen an increase in employment within the third sector (Cunningham 2001; Cunningham 2008a; Cunningham 2008b). The majority of paid employment within the sector is offered on a contract basis, highly subject to third sector funding.  The third sector has been able to attract professionals who share strong social values and exhibit interests in serving society (Cunningham 2008b). These people are willing to sacrifice higher financial compensation partially by lower pay or by volunteering. However, shared social value as a cause for generally higher job commitment also seems to create problems in managing employee commitments within TSOs. This may arise because of diversified individual group dynamics, as there are normally a number of independently funded projects in operation within one organisation (Alatrista and Arrowsmith 2004). Moreover, compared to HRM development within private sector service organisations, TSOs do not always have financial autonomy to pay for on-going employee training & development, to offer more career progression opportunities or to introduce practices protecting employees' well-being. Human resource is an important asset to organisations (Legge 2005). This is also considered to apply to charity/voluntary organisations within the third

sector (also referred as voluntary sector) (Nickson et al. 2008). Therefore, effectively managing and supporting the TSO workforce is thought to be crucial in order to sustain their contribution to TSO performance.

People working in TSOs are mostly attracted by non-monetary rewards such as social value realisation (Ridder and McCandless 2010). This becomes a key motivator as well as a key advantage for TSOs in attracting both paid and unpaid workforce (Cunningham 2008b; Nickson et al. 2008). However, such attachment to TSOs does not always have a permanent effect on sustaining employees because of their fear of having no work once their employment contracts run out and, hence, they are likely to leave the organisation or step out of the sector completely for making a living. For example, many TSO employees are 'forced' to leave their TSOs because there is no further funding to cover their salary (Cunningham 2008b). Furthermore, incapable people management is thought to be a key cause of the aforementioned issues faced by TSOs. This arguably leads to difficulties in planning and implementing HR policies and practices (Jackson, Cunningham, and Dutton 2001; Davenport and Gardiner 2007). These are considered as additional causes to the low employee retention rate in the sector (Jackson, Cunningham, and Dutton 2001; Cunningham 2008a). 'It is perhaps revealing that a recent study found labour turnover in the sector stood at 20 per cent and rising' (Dullahide et al. 2000, cited in Cunningham 2001, 228). Consequently, a high number of TSOs have been involved in industrial tribunal cases (Cunningham 2001). This therefore indicates these TSOs have, to various extents, failed to manage their workforce effectively.

Following from above discussion, this study intends to explore the concept of VM in depth in order to have a better understanding of its role to sustain TSO performance. The focus is on the impact of effective planning and implementation of VM policies and practices on attracting, engaging and retaining the volunteer workforce. This chapter sets the research context; it looks at the sector development from the early 1990s, the impact of institutional change on the sector, and on the development of volunteerism and VM. The empirical study is carried out within Scotland. Despite some differences between Scotland and other regions in the UK (such as legal and

institutional regulations), volunteers are widely acknowledged to be an essential human resource for TSOs. The focus is on micro perspectives within an organisation; thus, the study findings are considered to have a wider application beyond the geographical restriction.

## 1.2    Development and change of the third sector in the UK
### 1.2.1 Overview of the sector, the TSO and the workforce

It is necessary to have an understanding of the development and change which the sector has experienced over the years. This is to gain insights into how the VM concept emerged and why effectively managing the volunteer workforce is important to sustain TSOs' organisational development (as reflected in section 1.1). The third sector is a broader term which includes a wider range of organisations than public and private sectors[2]. The sector is often referred as the voluntary sector, non-profit or not-for-profit sector (Scottish Government[3]; Cunningham, 2001; Brown, 2004). Within the UK, the Office for Civil Society is responsible for all TSOs in the Cabinet Office, which replaced the Office of the Third Sector when the Coalition Government came in power[4] in 2010. There has been little change in terms of sector scale and sector type since the former Labour government came into power in 1996.

Despite a wide diversity in organisational mission and objectives, size and structures, these organisations all strive to serve philanthropic values, to bring 'good' to community, nature and mankind. This is reflected in a definition of philanthropy, 'love of one's fellow man, an action or inclination which promotes the well-being of others' (Prochaska 1988, 4). TSOs are often  regarded to be value-led (Hudson 1995). "Third-sector organizations are driven by a desire to improve the world in which we live" (Hudson 1995, 13). Historically, many charities relied on donations from individual or other organisations; some of them also relied on charitable sales and fundraising events (Prochaska 1988). But there has been more and more state funding to support charities over the past decades, with its peak time from the late 1980s.

This development is also considered to have led to the third sector expansion in the 1990s when a 'contract culture' emerged as a result of the New Public Management

(NPM) introduced by Blair government in the 1990s (Billis and Harris 1992; Billis and Harris 1996; Kendall 2003). This resulted in the emergence of both the 'contract culture' and the development of a 'Best Value' Policy to the UK third sector (Cunningham 2001; Cunningham 2008a)[5]. Institutional changes at national and regional level to a large extent influence how TSOs operate to survive, develop and sustain. As a result, these changes also have impact on the TSO workforce in terms of its expansion and sustainability. Statistics on the sector indicate a huge expansion of workforce size between 2001 and 2010 in the UK, implying a wider range of influence on society, economics and labour market. In 2010, the sector employed 765,000 people, an increase of 40% since 2001, amounting to 2.7% of UK paid workforce. Such increase continued even at the beginning of the financial recession (between 2010 and 2011), when workforce in private and public sectors shrank (NCVO research 2011)[6]. Despite this increase across the sector, small to medium TSOs are still unlikely to have higher number of paid employees than volunteers due to restricted financial resources (NVCO)[7]. Therefore, many TSOs are considered to operate in uncertainty as there is no guarantee of permanent funding, particular for those which largely rely on public funding. This increases difficulties in forecasting organisational development beyond their financial capacity. Hence, any change in social, economic and political environment would impact on a TSO's development and even its survival.

After a surge in the sector workforce size expansion slowed down following the decisions on public spending cuts made by the Coalition government, i.e. reduction to welfare spending in response to the continuing financial crisis (Dutton et al. 2013). This has since resulted in the shrinking of the sector workforce. It also, to some extent, increased difficulties of recruiting and retaining the 'right' people to meet demands for skill and knowledge, lowered resources for employee training and development, and heightened job insecurity (NCVO research 2011). During the same period, there were changes in volunteering involvement after the late 1990s, though the volunteer workforce remains a major source of workforce for the sector (Research statistics from NCVO)[8]. However, there is patchy evidence on how volunteers are managed and supported by TSOs as well as the impact of effective

volunteer management (VM) on sustaining TSO performance. This is partly, if not largely, because studies have focussed more on seeking and developing VM models and 'best practices', i.e. professionalising VM within TSOs (Hager and Brudney 2004); while other attention has been paid to measuring individual volunteering satisfaction (e.g. The UK Civil Society Almanac 2014 – Volunteering, NCVO; Community Life Survey 2012-13, Cabinet Office). Therefore, the research attention of this study is given to the influence of perception of conducting VM planning and implementing activities, instead of identifying 'effective' VM practices within TSOs.

### 1.2.2 Emergence of 'Contract Culture' and its impact on the third sector

The emergence of the 'contract culture' is considered an (important) external influence to introduce and professionalise volunteer management activities across TSOs (as mentioned in section 1.1). Within the overall sector, organisations that provide public services are considered to be more affected by the 'contract culture' (Cunningham 2001). Early development of the 'contract culture' can be traced back to the 1980s, when the Conservative government introduced the 1990 NHS community Care Act, designed to encourage local authorities to release tight control of service providing arrangements (Cunningham 2001). This meant that local authorities were recommended to 'purchase' services from organisations in other sectors, i.e. private and the third sector. This change in legislation in effect placed local authorities into multiple positions, 'enablers', 'commissioners' and 'purchasers' (Cunningham 2001). Furthermore, the change brought in a 'market' element to the welfare dimension and thus placed many voluntary organisations in a direct competition with private sector organisations. This resulted in the emergence of a 'mixed economy of care', which led to many voluntary organisations being funded by the state for a fixed period (Whelen 1999, cited in Cunningham 2001).

During the 1990s, the Blair Labour government carried forward the Conservative government's intention to reform the format of governance and management within voluntary sector organisations. The State expected such reform to reduce public spending and obtain 'better value for money from expenditure on the provision of public services' (Walsh, 1995; Rhodes, 1997 both cited in Cunningham 2008a, 381). Consequently, a notion of 'compulsory competition tendering' (CCT) was introduced

to local governments (Boyne 1998). CCT supported the idea of 'value for money' through competition of bidding public service contracts between private and voluntary organisations. The introduction of CCT meant that voluntary organisations could no longer receive government funding just through promoting philanthropic value and 'virtue of volunteerism' (Cunningham 2008a). They are required to provide a high level of service quality in order to 'win contract bidding'. Hence, this criterion has increased demands for a better trained workforce within voluntary organisations (Cunningham 2008a).

The emergence of the 'contract culture' is considered to have almost reshaped the relationship between the state and TSOs (Cunningham 2001). The notion of 'value for money' is encouraged by the state under the 'contract culture', and "the relationship between public funder and voluntary organisation is based on *transaction*, in which the duties of the provider to the purchaser are worked out in an exchange regulated by precise, measurable and binding standards" (Tonkiss and Passey 1999, 268). In Scotland, this was also supported by a 'Best Value' policy introduced via the Local Government Act 1999 (Cunningham 2008a), together with 'compulsory competition tendering' (CCT). These changes, expected to enhance service delivery outcome/quality by focussing on satisfying service recipients, to some extent sustained voluntary organisations' funding and hence their workforce[9]. With this financial support, voluntary organisations have also been able to fund workforce training and development to maintain and improve service quality. But voluntary organisations face challenges of managing their workforce effectively under the pressure of the 'contract culture' because it 'pushes' voluntary organisations to compete with private organisations for service contracts. Because private organisations tend to have a more established organisational structure due to more adequate financial resources, many voluntary organisations assume that such formally structured organisations would potentially have competitive advantages in contract bidding (Billis and Harris 1996). This is considered a stimulus for professionalization or bureaucratization of TSOs (Carey, Braunack-Mayer, and Barraket 2009; Fyfe and Milligan 2003; Jenkins 2005). This study intends to touch

upon 'professionalization' of VM in terms of exploring needs for standardising VM policies and practices, but it is not the main focus of analysis.

### 1.2.3 Impact of the financial recession 2008 and welfare reform on the sector and TSOs

### 1.2.3.1 The Welfare Reform – UK wide

'Contract culture' sped up sector expansion from the late 1980s (Kendall 2003). This was particularly shown in employment expansion (Cunningham 1999). Additional influence on the sector and TSOs comes from the 2008 financial crisis and the resulting global stagnated recession. As a result, UK economic growth was, to a large extent, damaged (Kotz 2009; Campello, Graham, and Harvey 2010), hence negatively affecting the UK third sector. Both the sector and the state have worked together in order to minimise the impact of recession upon TSO infrastructure and continuing development. As an immediate response, 'Real Help for Communities' was launched in Feb 2009 (R. Taylor, Parry, and Alcock 2012) by the Brown (Labour) Government. The Action Plan received diverse responses from TSOs. It was seen to drive a trend of merging and acquisition which 'pushed' partnership among TSOs (R.Taylor, Parry and Alcock 2012). There were also negative views as the Action Plan was considered to be "short term and lacking strategy and resources with unworkable compliance requirement." (R.Taylor, Parry and Alcock 2012, 26). Because the Plan was introduced towards the end of the Brown Government, it was probable that there was not enough time to implement the Plan across the sector, although its notion was carried forwarded by the Coalition Government. When that government came into power in May 2010, they put forward a proposal to cut public spending, aimed at helping the government to manage through the recession period (also known as 'welfare reform').

### 1.2.3.2 Impact of the Reform on Scottish third sector

In Scotland, the Welfare Reform from the UK government resulted in a reduction of the Scottish Budget (departmental expenditure limits) by a cumulative 11.2% from 2011/12 to 2014/15, with a likelihood of continuing (Dutton et al. 2013). This cut in public funding consequently intensified competition in contract bidding, causing

more and more TSOs to face uncertainty. As a result of the spending cut, the workforce size shrank, particularly in those TSOs which provide public care services, despite their providing about one third of public care services in Scotland.

"79% of voluntary sector care organisations have been unable to award a cost of living rise to staff equivalent to the increases paid to the public sector workforce. 57% have implemented pay freezes. 44% have made redundancies to frontline staff, and 55% have lost line managers. 60% have made cuts to training budgets. 73% report that they increasingly have to raid organisational reserves in order to maintain services and only 15% retain any link with public sector pension arrangements" (SCVO, 2011)[10].

Responding to the public spending cut, the Scottish National Party (SNP) government has since 2011developed various policies to fulfil its commitments to "promoting high quality public services", while acknowledging "the importance of the third sector in on-going public service reform" (Dutton et al. 2013). These policy changes included "localism (with more local control over planning and services); the personalisation agenda (self-directed support); welfare reform; the Work Programme and the consequences of the UK and Scottish government Spending Reviews" (Osborne et al. 2012)[11]. The introduction of these policies required the TSOs to focus more on service delivery quality, which in turn implied the need for improving the workforce's skill levels, particularly the service delivery workforce (paid and/or unpaid staff). Therefore, TSOs were more than ever required to attract and retain suitable workforce, including volunteers.

The financial recession brought turmoil to TSOs and has led to an 'uncertain' future for the third sector[12]. The recession poses risks in securing and stabilising the source of funding to TSOs. This in turn has an impact on sustaining paid workforce as reflected above. Therefore, the volunteer workforce continues to be regarded a valuable resource to TSOs, small to medium ones in particular, in terms of sustaining organisational development with unstable and limited financial resource. Demands for good leadership and effective management of the volunteer workforce have also been identified through research (e.g. NCVO 2011; Dutton et al. 2013). Furthermore, managers of small to medium TSOs are acknowledged to be forced to "embrace a wider range of roles", because such organisations do not have enough staff to support

narrowly-defined management support roles such as marketing, IT support, HRM (human resource management) and operations management (Osborne et al. 2012). These organisations lack sufficient financial resources to undertake diversified roles and responsibilities; this thus limits their capacity to effectively manage their volunteer workforce.

The importance of the volunteer workforce as mentioned in section 1.1 suggests that it is crucial for TSO managers to effectively manage and support them in order to get and keep suitable people. Therefore, effectively VM planning and implementation are thought to affect sustainable TSO performance. In the following sections, a review of volunteerism shows the importance of effectively managing volunteers. As volunteers are considered to be a unique TSO workforce, the volunteer management is thus seen to be HRM as well (Cuskelly et al. 2006).

## 1.3 Volunteerism and Volunteer Management

### 1.3.1 Volunteerism

#### 1.3.1.1 Exploring the term

The term 'volunteerism' emphasises individual voluntary action in society, "at its broadest it is a conceptualization of freely chosen individual action" (Osborne 1998). Volunteerism is regarded as 'an essential ingredient' of TSO characteristics (Hudson 1995). The volunteer workforce is considered to a large extent a key human resource within the sector if one looks at historic developments of charitable organisations. Historically, almost all charities were initiated by people who helped out on a voluntary basis, merely striving to 'do some good' to the community and society since early years (Prochaska 1988). In general, the term 'volunteer' is used to emphasise that individuals want to donate their time and effort without expecting any form of compensation in return. A volunteer in modern western society is considered to be someone:

> "…who voluntarily provides an unpaid direct service for one or more other persons to whom the volunteer is not related. The volunteer normally provides his or her services through some kind of formal scheme rather than through an informal neighbouring arrangement." (Darvill and Mundy, 1984, p.3; cited in Osborne 1998, 9)

This definition also indicates the type of volunteerism to be studied in this research, i.e. those who carry out volunteering work formally organised by a TSO. As discussed in section 1.2, changes in social, political and economic landscapes over the years have shaped the third sector. External changes lead to a need for internal changes within TSOs (Wilson 1996). Therefore, TSOs also have changing requirements and expectations from volunteers, and there are more and more discussions that volunteers should also be managed and supported structurally within TSOs (Wilson 1996). This also reflects a debate to distinguish different typologies– 'voluntaryism, volunteerism and voluntarism' (see details on this in Osborne 1998, 7 – 14). 'Volunteerism' is considered to reflect individual volunteering motives and expectations, hence influential to volunteering behaviour within a voluntary organisation; whilst 'voluntarism' is considered to reflect the characteristics of a voluntary organisation, in the aspect of organising voluntary action within a 'voluntarism' organisation. The former typology focusses on individual voluntary action, and the latter focusses on the nature of a voluntary organisation's establishment, i.e. it is set up free from any bureaucratic/institutional restriction in particular.

The organisational characteristics summarised in the John Hopkins study (cited in Osborne 1998) have encapsulated a diverse range of organisations.

- "Formally constituted organizations;
- Private organizations, and separate from government (though they could receive governmental support for their work);
- Not profit-distributing to their owners or directors;
- Self-governing and 'equipped to control their own activities'; and
- Had some meaningful voluntary content, such as voluntary income, volunteer labour or voluntary management."

(Osborne 1998, 15)

Over the last decades, the third sector has expanded both in terms of its workforce and more diverse types of organisations (refer to section 1.2). Statistics show that approximately 1.2 million adults volunteered in Scotland in 2010 alone, which gives

a total of 131 million hours and creates an economic value of £2.1bn (Scottish Third Sector Statistics 2010)[13]. Some study findings show that TSOs have higher demands of professional workers not only to create competitive advantage in contract bidding, but also to facilitate future planning and organisational development. Although people are attracted to work for TSOs, many organisations still face challenges in recruiting and retaining paid employees. In addition to limited financial resource for many small to medium TSOs, this is also caused by various factors such as uncompetitive pay, job insecurity and misconception of jobs in the sector (Nickson et al. 2008; Wilson 1996). These issues are considered as part of the causes that make a volunteer workforce an important human resource for (small to medium) TSOs. Moreover, volunteers also have the diverse skills and knowledge required by TSOs, and they are highly committed to volunteering work. Therefore, volunteers undoubtedly contribute to social value realisation and the sustaining of TSO performance (Farmer and Fedor 1999).

### 1.3.1.2 Understanding volunteer behaviour

As mentioned at the beginning of this chapter, volunteer behaviour within TSOs tends to be complex, diverse and unpredictable. This, together with the diverse roles and responsibilities of TSO managers (refer to section 1.2.3.2), creates another big challenge for effectively managing the workforce. Because it is considered beneficial for TSOs to understand volunteer behaviours, previous studies mainly focussed on understanding volunteer behaviour within organisations from two major theoretical perspectives – volunteer role-identity (Callero, Howard, and Piliavin 1987; Grube and Piliavin 2000; Piliavin, Grube, and Callero 2002); and a functional analysis approach (Clary and Snyder 1999; Clary et al. 1998; Omoto and Snyder 2002; Omoto and Snyder 1995). For the former approach, scholars studied volunteer behaviour by applying Role Theory to the social context of volunteerism (Finkelstein 2008a). Drawn on study findings, volunteering identity is considered as one of multiple 'self', which leads to the argument that people seek who they are through volunteering itself, not what they specifically do (Van Dyne & Farmer, 2005 cited in Finkelstein, 2008a). On the hand, a functional analysis approach sees volunteering work as tending to meet diverse volunteering motives; this approach considers that

people enter volunteering work based on the type of work, i.e. what they do (Finkelstein 2008b).

Volunteer role-identity analysis – Complexity of volunteer roles within TSO

Volunteers have multiple 'identities' in and outside their TSO. They are 'workers who implement organisational decisions', and also 'owners of the organisation' who often make those decisions (Pearce 1993). In addition, they are also the 'clients of the organisation'. Multiple identities make the volunteering role more complex. Such complexity also makes it difficult for TSOs to manage and support their volunteers (Pearce 1993). Furthermore, the majority of TSOs have both volunteers and paid employees, although percentage distribution does vary. Employment legislation provides legal frameworks for TSOs to adapt to managing paid employees. Frameworks for managing volunteers, on the other hand, are much less formal and there are almost no established regulations and policies (Volunteer Development Scotland 2009). Therefore, both volunteers and their organisations tend to experience uncertainties, such as 'uncertainty in formal organisational roles' and 'uncertain boundaries' (Pearce 1993). Volunteer role-identity has been studied as a predictor of volunteerism (Finkelstein, Penner, and Brannick 2005). This study argues that individuals engage in a volunteering role informed by their desired identity; thus their volunteering outcomes are measured by the extent to which volunteerism meets the desired identity. Furthermore, many people tend to embed their volunteering identity into their 'core-self' (Reich 2000), which is considered to influence the level of their commitment.

Diverse volunteering motives – a functional analysis approach

From a functional analytical perspective, diverse volunteering motives are also considered as leading to complex volunteer behaviour within TSOs (Clary and Snyder 1999; Clary et al. 1998; Omoto and Snyder 2002; Omoto and Snyder 1995). "Different individuals may be engaged in the same volunteer work for very different reasons, and the same individual's motives can change over time" (Finkelstein 2008b, 10). Previous academic studies of volunteers have focussed on motives (e.g. Coyne and Coyne, Sr. 2001; Cuskelly and Boag 2001; Vinton 2012; Clary et al. 1998;

Farmer and Fedor 1999). Findings indicate that volunteering motives are rather diverse. As a key part of the TSO workforce, volunteers are engaged in a wide range of charitable activities. Historically, people volunteered merely for 'helping out' and 'connecting with others' (e.g. Clary et al. 1998). But other study findings claim that volunteering motives associate with perceptions and personal expectations in terms of how volunteering could benefit themselves, e.g. 'enjoyment' (Allison, Okun, and Dutridge 2002). Still other study findings recognise that volunteering motives consist of both altruistic value and the need for personal development (Wang 2004).

In summary, volunteering motives previously identified and studied fall into three broad categories: a) intention of caring for others (showing concerns and sympathy towards society, environment, animals and other human beings); b) desires of self-fulfilment and development to enhance employability (job related preparing and learning new skills) and c) gaining more relevant experience for development at personal level, or to help to settle in changed personal circumstances. These personal motives might include building confidence, social inclusion by connecting and feeling attached to communities and groups, and re-establishing routine life after retirement (Clary et al. 1998; Allison, Okun, and Dutridge 2002; Wang 2004; Warner, Newland, and Green 2011).

Understanding volunteering motive, despite its complexity, is argued to be a key to managing volunteers effectively (Chambre, 1987, cited in Bussell and Forbes 2003). This is because volunteers are not subject to any legal obligation in undertaking their volunteering role, and TSOs cannot force anyone to volunteer for them. Volunteers will presumably only stay with 'their' TSOs if their volunteering motives are met. It is therefore important for TSOs to understand their volunteers' motives if they are to sustain volunteer contributions to organisational development. This is particularly crucial for small to medium TSOs who heavily rely on volunteer contribution. It also makes it crucial for TSOs to establish volunteer management (VM) practices to suit volunteers' needs.

It is further thought that the level of volunteer engagement to the role depends on how their volunteering motives are fulfilled (Finkelstein 2006; Rioux and Penner 2001). For example, some studies found it tends to influence both the amount of volunteering time (Finkelstein and Brannick 2007; Finkelstein 2008b), and the involvement in future volunteering activities (Omoto and Snyder 1995). Despite one study which reported weak correspondence between volunteering motive strength and volunteer engagement (Finkelstein, Penner, and Brannick 2005), general research findings show volunteer involvement to have a positive influence on TSO performance.

### 1.3.1.3 Understanding volunteer behaviour - combining role-identity and functional analysis

These two approaches to various extents helped researchers understand the role played by volunteering motives and the positive impact of fulfilling them. They suggest ways of understanding volunteering behaviour from different perspectives: volunteering role and motives. It is, however, argued that these perspectives are interrelated and should be looked at together in order to provide a comprehensive understanding of volunteer behaviour. Volunteering motives could be regarded as outcomes influenced by individual's perceived identities and their expected roles, as established through volunteering (Finkelstein and Penner 2004). From the TSO perspective, volunteers' perceived role-identities tend to match volunteering role requirements; hence, the TSO benefits from volunteer contribution. What role and what identity volunteers want others to see them in is very likely to be rooted in their volunteering motives and expectations.

From a VM aspect, it is thought important to understand volunteer perceived identity as well as volunteering motives. Previous study findings suggest that these two factors tend to determine people's level of volunteering commitment and the length of the volunteering period (Finkelstein 2008a; Finkelstein, Penner, and Brannick 2005; Reich 2000). Therefore, combining both approaches is thought to capture a fuller picture of volunteering behaviour. It further helps to distinguish reasons for individual volunteers to stay with their TSOs: is the volunteering role retention

driven by volunteer's desire of self-realisation, or shaped by others' work such as volunteer coordinators' (VC)? This question is regarded as crucial to understanding the influence of the VC on volunteers through successfully implementing VM practices. After all, not all volunteers are engaged with their organisations on entering a volunteer agreement. Previous studies have made little attempt to answer this question. This study, thus, intends to seek empirical evidence for further exploration.

### 1.3.2 Volunteer management (VM)
### 1.3.2.1 Needs for VM in TSOs

Historically, volunteer management/coordination (VM) was carried out by other volunteers responsible for planning and organising voluntary work; it did not become a paid job within the sector until the 1960s (Lishman and Wardell 1998). It is observed that the topic of VM was not paid enough attention within the sector, despite being raised fairly early. Academics also gave it little attention until the emergence of the 'contract culture', but the concept was actually brought up as early as the 1960s in the UK through the Aves Report of 1969 — *The Voluntary Worker in the Social Services* (Smith 1996). This also echoes the argument in section 1.2.3.2.

> "It is very necessary in any service using volunteers that there should be some form of organisation of their work. By organisation we mean the provision of a system within and through which volunteers are enabled to carry out their work, as far as may be possible, effectively, smoothly and with satisfaction to their clients, themselves and the services which need their help (Aves, 1969, p.93)" (Smith 1996, 189)

TSOs tend to view organisational change as a means to introduce new business and management practices, most of them developed within the context of the private sector e.g. HR practices and strategic management approaches. This, along with the influence of 'contract culture' seems to create trends towards 'formalisation' and 'professionalization' (Smith 1996; Wilson 1996). Not only do these two trends influence paid employee management, they also, to various extents, have resulted in the development of formal VM practices over the past two decades (Smith 1996).

A number of studies conducted by both academic and sector based researchers look at VM issues (e.g. Gaskin 2003; Baines 2004; M. Kim, Zhang, and Connaughton 2010; Bowman 2009; T. Taylor et al. 2006; Leonard, Onyx, and Hayward-Brown 2004; Farmer and Fedor 1999; Hustinx and Handy 2009). Studies carried out by sector based institutes focus more on introducing 'best practices' (e.g. Institute of Volunteer Research; Volunteer Development Scotland; Third Sector Research Centre). These studies aim at evaluating needs for VM and providing information on how to effectively manage volunteers (e.g. Gaskin 2003). However, it is argued that there is limited academic research focussing on understanding VM using HRM theories such as reasons for managing volunteers, or the link between effective VM implementation and organisational performance (Leonard, Onyx, and Hayward-Brown 2004; T. Taylor et al. 2006).

Furthermore, there is little research exploring VM issues from strategic HRM perspectives, such as the impact upon TSO performance through strategically planning and implementing VM. It is thought necessary to explore these issues from a strategic HRM perspective, as volunteers are considered to be an important part of the TSO workforce. Additionally, small to medium TSOs largely rely on their volunteers' contribution to carry out core activities. Therefore, managing volunteers effectively is considered to be particularly important to these TSOs. As mentioned in the previous section, 84% of TSOs in Scotland are small to medium organisations (Scottish Third Sector Statistics 2012). This further confirms that established VM would help to ensure better operational outcomes and to contribute to TSOs development in the long run.

### 1.3.2.2 Support on VM development and the outcome

The introduction of 'Investing in Volunteers' (IiV) accreditation in 2003 arguably responded to an increasing demand for effectively managing the volunteer workforce. It is also considered to provide a framework for TSOs to structure VM practices. However, only 650 organisations which have been awarded accreditation across the UK since 2003, while there are over 23,000 registered TSOs in Scotland alone (OSCR). This indicates that the benefit of the accreditation framework has not yet

been widely recognised and applied. However, umbrella organisations within the sector [for example, the Institute for Volunteering Research (IVR), Third Sector Research Centre (TSRC), and Volunteer Development Scotland (VDS)] have been seeking different ways to support the management of volunteers. Consequently, they have introduced various management tools and VM models. Also, various publications have been made available to facilitate the establishment of VM policies and practices as well as improving TSO managers' competence in managing volunteers (McCurley and Lynch 1994; McSweeney and Alexander 1996).

However, the intended VM implementation is not always realised through the actual implementation. The trend in formalising management of TSOs and their workforce does not seem to effectively attract and retain volunteers (Stirling, Kilpatrick, and Orpin 2011). Therefore, there is a need to understand better why there are discrepancies between intended and actual VM implementation. This also reflects an ongoing debate within the HRM field in terms of the impact of HRM practices on organisational performance. Studying this topic was previously considered as opening up a 'black box' (Boselie, Dietz, and Boon 2005), but researchers have carried out studies through alternative approaches to offer clearer pictures of the link between HRM and organisational performance (e.g. Subramony 2009; Jiang et al. 2012; Wright, and Nishii 2013; Khilji and Wang 2006; Becker and Huselid 2006; Woodrow and Guest 2014). Among the aforementioned studies, the one by Woodrow and Guest (2014) focussed on "the influence of HR implementation on employee attitudes and behaviour" and provides "a fuller understanding of how and why implementation of HR practices can succeed or fail…" (39). This view seems appropriate to explore the impact of VM planning and implementation (the study focus). Extending this to the wider VM context, VM effectiveness is presumably influenced by how the CEO and VC plan and implement VM policies and practices. Their perceptions of the need for VM in turn affect how volunteers perceive the value of VM to fulfil their expectations.

In the context of volunteer management, although the above mentioned approaches promote the importance of VM and encourage TSOs to develop effective VM

policies and practices, they do not offer any guarantee or directly link effective outcomes with implementation. There are concerns that some TSOs might have adapted these frameworks too rigidly without fitting them to their organisational needs. The review in this section highlights the important role volunteer coordinators (VCs) fill in achieving effective outcomes for VM implementation. In practice, however, VCs' knowledge and skill in people management are mixed (Farmer and Fedor 1999; Gaskin 2003; Leonard, Onyx, and Hayward-Brown 2004; T. Taylor et al. 2006; Waikayi et al. 2012). In order to further understand the important role of the VC, the next section approaches the VM concept from HRM perspectives, giving rationales for exploring the role of the VC.

### 1.3.3 Understanding the role of VM via HRM theoretical perspectives
### 1.3.3.1 Managing volunteers: HRM in a different context

As volunteers are important human resource to TSOs (as discussed in section 1.3.1), their management can be regarded as human resource management. Therefore, many HRM practices have been applied to managing volunteers (Cuskelly et al. 2006; Hager and Brudney 2004); 'VM models', 'best VM practices' and 'Investing in Volunteers' framework were developed from HRM practices (mentioned in section 1.3.2). However, it is considered inappropriate to manage volunteers through simply adopting existing HR practices (Cuskelly et al. 2006; Volunteer Development Scotland 2009; Waikayi et al. 2012). Generally speaking, this is because the primary objectives of HRM frameworks aim at serving a profit generating purpose. Furthermore, developments in HR related legislation have provided various means to measure firms' HRM efficiency (Boxall 2003; Boxall 1998; Boselie, Dietz, and Boon 2005; Lengnick-Hall et al. 2009). These legal constraints to some extent offer protections to individual employees (Brown et al. 2000; Pollert 2005; Dickens and Hall 2006). From HRM theoretical perspectives, practices such as support to training and development, and performance review are held to enhance the level of volunteer commitment (Legge 2005; Davenport and Gardiner 2007), as they potentially protect employee well-being (Woodrow and Guest 2014). Therefore, effective implementation of HRM practices probably enable volunteers to create economic value for TSOs (McSweeney and Alexander 1996; Bowman 2009). Furthermore,

because the volunteering role has no legal status, it is more difficult for volunteer coordinators (VCs) to effectively manage and support volunteers.

### 1.3.3.2 Previous studies on VM development

Research attention to VM emerged in the late 1990s, much of which applied HRM related theories to the context in order to explore the field, from the behavioural perspective in particular. However, to date volunteer *management* has to a large extent been studied through helping volunteer managers understand the volunteers' motives and expectations (T. Taylor et al. 2006; Stirling, Kilpatrick, and Orpin 2011; Waikayi et al. 2012). The extended review from earlier studies on volunteer motivations indicate the important role TSOs play in cultivating and reforming volunteers' motivations in order to retain them. Hence, TSOs are responsible for sustaining a viable volunteer workforce. Doing this successfully also potentially increases the overall volunteer population within society (Warner, Newland, and Green 2011); this potential impact also echoes the HRM theoretical debate on the contribution made by effective people management (Legge 2005; Boxall 1998). In addition, the argument reflects the fact that volunteers are also customers to TSOs, and that satisfying them could lead to the development of 'customer loyalty' (Warner, Newland, and Green 2011).

The majority of the study findings provide information to TSO managers on how to better manage volunteers. It is also considered important to explore VM's impact from a relationship perspective, i.e. the relations between volunteers and the organisation (Liao-Troth and Dunn 1999; Jaeger, Kreutzer, and Beyes 2009; Cunningham 2010; Kreutzer and Jäger 2011). As it is acknowledged that volunteers are likely to gain enjoyment and satisfaction through volunteering, a good volunteer-organisation relationship (VOR) is a key element to better manage volunteers. Arguably, the VOR is established through managing and supporting volunteers, as well as satisfying their motives (Gaskin 2003; Wang 2004). Failure to build a good VOR is also considered as having negative impacts on TSOs, such as damage to public image, disruption of normal operations and increased difficulty in attracting new volunteers (Farmer and Fedor 1999). Furthermore, since volunteers are

recognised as important human resources to TSOs, VOR through managing volunteers has an impact on TSO performance from a strategic HRM perspective (Jaeger, Kreutzer, and Beyes 2009).

### 1.3.3.3 Maintaining relationships with volunteers via volunteer agreements

Within organisations, 'people relationships' often refers to those formed between employers and (paid and unpaid) workers. In the concept of social exchange theories (Chadwick-Jones 1976; Emerson 1976), such relations have been seen as an exchange activity: to receive (paid) employees' effort and loyalty in order for organizations to gain both "material and socioemotional benefits" (Aselage and Eisenberger 2003, 491). The employment relationship has been explored and studied by organisational and management scholars for many years (e.g. March and Simon 1958; Levinson 1965; Etzioni 1975; Gould 1979; Aselage and Eisenberger 2003). Employees are likely to be more committed to their work and be more engaged with their organisations if they receive good treatment, hence feeling satisfied through working (George and Brief 1992; Aselage and Eisenberger 2003). In the context of volunteering in TSOs, such theoretical perspectives also seem suitable to explore VOR, although this relationship is to a large extent established through volunteers' altruistic intentions. Volunteers expect to gain satisfaction mainly by receiving respect and recognition from TSOs, or by fulfilling their motives and expectations through participation. In exchange for these gains, TSOs can benefit from volunteers' knowledge, experience and their commitment. The VOR in this context does not involve monetary reward; this is predicted by the nature of volunteering (see section 1.3.1).

The volunteer contract indicates the start of a relationship between volunteer and a TSO; VM practices exist to maintain healthy development of the VOR to achieve mutual benefits. This volunteer agreement, as a form of VM, has been more and more encouraged by the development of the 'contract culture' and by funders' increased demands for high quality services delivery (see section 1.2). The majority of the agreement consists of explicit terms offering useful information to volunteers carrying out work: volunteering roles and responsibilities, work arrangements,

organisational support (training, expense claim and/or performance review) and general information such as health & safety, data protection and insurance policy. But a volunteer agreement has no legal obligation of fulfilment for either volunteers or their TSO (two contract makers); its impact on VOR thus differs from an employment agreement. Employment relationships are established via employment contracts required by law, so those relationships are protected by HRM legislation (Brown et al. 2000; Anderson 2003). Volunteers, on the other hand, do not have legal status as employees. Therefore, it is not easy to build effective a VOR through the volunteer agreement, since it has neither a fixed framework to follow nor legislations to adapt (refer to section 1.3.2).

## 1.4 Chapter Conclusion

Considerations of social, political and economic impact on the development of the third sector and TSOs show that changes at TSO level are subject to external changes from the sector and beyond. Although this influence does not immediately affect TSOs, it often triggers changes in social demands for TSO activities, hence, funds availability and allocation. As a result, TSOs constantly face challenges to retain their human and financial resources, to survive, and to develop. Rising from the above reflections, the value of the volunteer workforce is acknowledged, as an important human resource to TSOs since early years and still continuously playing a crucial role in sustaining TSO performance. This suggests that TSOs need to effectively manage their workforce in order to sustain organisational development under current unstable social, political and economic environment. To elaborate this statement, the study proposes to explore what contributes to effective volunteer management, and what influences effective outcomes of VM planning and implementation.

HRM development across TSOs is being introduced as a result of recent changes to institutional, social and economic environments; although there seems to have been little time for TSO managers to prepare to face these changes within organisations. Consequently, the HRM concept has been injected to UK TSOs on an unbalanced ground, and thus caused HRM constructs to vary from one TSO to another. Despite

the observation of an uneven development, previous studies have provided empirical evidence to confirm that TSOs undoubtedly recognised HRM to be necessary and important. Although establishing formal VM practices has been encouraged across the sector under the influence of the 'contract culture', their actual implementation has not seemed to have the expected positive impact on managing and supporting volunteers. Various aspects have been reviewed in this chapter (section 1.3) to understand the reasons for a gap between intended and actual VM. As a result of the review, a deeper understanding of the process of planning and implementing VM seems needed. Therefore, the empirical part of this study will look at this process. The study takes a strategic HRM (SHRM) view, focussing on linking strategic management to building and maintaining the volunteer-organisation relationship (VOR).

Following from this chapter, details on the proposed research (including applied theories, design of the conceptual framework, proposed research objective, aims and questions) are provided in chapter Two. Then the first part of Chapter Three considers the research philosophical stance, research design and the methodologies. Account of an initial study is also given as it was conducted to help the preparation of the main study stage. The second part of Chapter Three provides discussions on the main study, including data collection and management. Profiles of the researched organisations and an overview of the data analysis arrangement are in Chapter Four. Study findings are provided in Chapter Five, Six and Seven by answering the research questions, reflecting the conceptual framework provided in Chapter Two; Chapter Eight then contains final discussions of conclusions and implications, and ends the thesis by looking at contributions, reflections and implications.

# CHAPTER TWO: Development of the Conceptual Framework – a Theoretical Review of HRM

## 2.1 Overview

As mentioned in the previous chapter, the study is guided by theoretical perspectives and academic research themes in the HRM field. It combines three different aspects of HRM to explore the concept of VM: a) the resource based view (RBV) perspective of HRM, b) the Psychological Contract Theory focussing on volunteer contracts, and c) the HR role of line managers (in this case, volunteer coordinators referred to as VCs). These three theoretical perspectives can capture insights into the influence of perceptions from CEOs (whose perception has an impact on VM planning), VCs (whose perception has an impact on actual VM implementation) and volunteers (whose perception has an impact on the outcome of VM planning and implementation, hence leading to retention/withdrawal from volunteering) to the actual VM implementation. The research reflects the importance of strategically managing the volunteer workforce to its engagement and retention.

Although many scholars argue the distinction of TSOs from private sector organisations, in that TSOs are more social-value led and thus do not aim at profit maximisation, some theories based on private sector organisations have proved to be useful to explore TSOs (Billis and Harris 1996). TSOs, like private sector organisations, can benefit from strategic planning to achieve their mission and objectives. Previous research has identified similarities in measurements of organisational performance between TSOs and private sector organisations (Herman and Renz 1998; Baruch 2006). Research has also been carried out to explore the importance of TSO's human capital (e.g. Kong 2007; Kong 2008; Benevene and Cortini 2010). Some study, in particular, revealed that a lack of 'alignment between HRM and strategy' has negative impact upon effective strategy implementation (Akingbola 2006; Ulrich 2009), with similar impact as regards organisations in public and private sectors.

It is important to understand the relationship between strategic management and individual relationships within the organisation, as discussed in the domain of

strategic HRM (SHRM). "A theory of strategic HRM must explain the relationship between strategic management and employment relations in the firm (Boxall, 1992)" (Boxall 1996, 62). To achieve a good alignment between TSO's strategic management and the volunteer-organisation relationship (VOR), the perceptions of CEOs, VCs, and volunteers perceive on VM are thought to be crucial to affect the VM effectiveness (refer to discussions and reviews in Chapter One).

This chapter provides detailed reviews to rationalise the selection of these three theoretical concepts for this study, in terms of their suitability to guide the data collection. The following section surveys the development of HRM and SHRM. The next three sections then focus on the three theoretical perspectives: a) the RBV perspective of HRM, b) the Psychological Contract Theory, and c) the HR role of line managers. Reviews are conducted by applying each theory to the VM context. The rest of the chapter then focuses on developing a conceptual framework for the study, as well as stating the research aims & objectives and research questions arising from the content of both Chapter One and Two.

## 2.2 Overview of HRM, SHRM and their development in the sector

### 2.2.1 Overview of HRM and strategic HRM

The attention to HRM (seen as the 'evolved form of personnel management') was first developed in the private sector, whose goal is to increase profit and productivity. It is acknowledged that firms generate profit through 'man power' by hiring and allocating 'human resource' across business units. They plan and implement business strategies in order to sustain business performance. Under such rationales, theoretical debates on HRM are introduced. Over the past three decades, HRM theories have been developed and extended from both psychological and sociological aspects (e.g. the development of 'hard' and 'soft' models of HRM) (Schneider and Barsoux 2003; Legge 2005). A wide range of academic studies have been carried out looking at almost every aspect of HRM development within the private sector worldwide. Study focuses range from strategic HRM, industrial/employment relations, to HR practices implementation both at national and international level (e.g. Lindsay and Rue, 1980; Gibb, 2003; Green et al., 2006; Maxwell and Watson, 2006).

Technological development advances societal development, hence an increase in human needs as regards living standards, monetary reward and/or the physiological needs (see Maslow's hierarchy of needs, 1958 discussed in Huczynski and Buchanan 2007). Employees have increasing non-monetary demands such as career progression options, training & development opportunities and acknowledgement of non-work commitments. These changes in employees' expectations require firms to shape relevant HR policies and introduce new HR practices. These activities are felt to motivate employees, thus enabling firms to retain them (Boselie, Dietz, and Boon 2005). Consequently, greater consideration is given to developing HR practices based on the notion of motivating and engaging employees (Gooderham, Nordhaug, and Ringdal 1999; Schneider and Barsoux 2003; Legge 2005). Rapid general development across the private sector speeds up HRM development. Since the time in the 1980s when HRM was first introduced as a new term and a new idea replacing traditional 'personnel management', there have been significant shifts of focus on knowledge expansion in HRM and specification of HR functions within organisations. Informed by these developments, regulations and laws have also been improved and/or introduced by governments to protect both employers and employees' rights (Legge 2005).

**Strategic HRM: the impact of effective HRM implementation on organisations**
Establishing and maintaining employment relations are thought to lead to sustaining organisational development, hence influencing organisational performance (Boselie, Dietz, and Boon 2005; Legge 2005; Lengnick-Hall et al. 2009). This is also reflected in a key concept that shaped SHRM theory, an emphasis on explaining 'the relationship between strategic management and employment relations' (Boxall 1992, cited in P. Boxall 1996, 62). Research themes on SHRM have changed over past decades, from initially establishing concepts (e.g. Miles and Snow, 1978; Guest, 1987; Hendry and Pettigrew, 1990) to the attempts of identifying a link between HRM and organisational performance (e.g. Becker and Huselid 2006; Khilji and Wang 2006; Subramony 2009). As one HRM subfield, SHRM establishes a framework in which HR policies and practices are implemented. Successful SHRM

execution is argued to lead to the improvement of organisational performance. This argument is supported by a number of studies (e.g. Delaney and Huselid, 1996; Koch and McGrath, 1996; Boxall, 2003; Guest et al., 2003; Chang and Huang, 2005; Green et al., 2006). These studies provide evidence to confirm relationships between good SHRM outcomes and positive business/organisational performance.

Although there are still arguments about a lack of empirical evidence to support a causal relationship between SHRM and organisational financial performance (Boselie, Dietz, and Boon 2005); existing study findings have provided substantial information to confirm that SHRM is positively linked to other performances/outcomes i.e. 'organisational outcomes' and 'HR-related outcomes' (Guest 1997). Both these outcomes refer to productivity, quality, efficiencies and HR-related performance, but the latter is more about 'attitudinal and behavioural impacts on employees' i.e. satisfaction, commitment and retention (Boselie, Dietz, and Boon 2005). These impacts can also be regarded as employee well-being. Employee well-being has increasingly been thought to have a high impact on employee engagement to work/their organisation (Macey and Schneider 2008; Schaufeli and Bakker 2010; Legge 2005). From a SHRM perspective, HR practices that aim to protect employee well-being are seen to reflect managers' seriousness as regards HR practice implementation (Woodrow and Guest 2014). This claim applies whether or not managers perceive that people are an important asset to their organisation, and that good employee relationships can have an impact on successful strategy execution, hence on organisational performance. The claim further indicates that the link sought by SHRM connects strategic planning at organisational level to individuals within an organisation. Effectively maintaining this link can be realised by (line) managers through HR practice implementation (Huselid, Jackson, and Schuler 1997; Delaney and Huselid 1996).

### 2.2.2 A need for strategic HRM within TSOs

The nature of TSOs indicates that human resource is an essential asset, as they are only likely to win contract bidding under the 'Contract Culture' if they have a skilled and knowledgeable workforce to fulfil the contract (see section 1.2 in Chapter One).

Therefore, strategically managing resources within a TSO implies a need to strategically manage the workforce. However, limited and unstable financial resources often constrain TSOs from sustaining and/or expanding a paid workforce, particularly in small to medium sized TSOs. Therefore, within these TSOs the proportion of volunteer workforce is usually much larger than paid staff. Thus, it becomes vital to strategically manage volunteers to achieve sustainable organisational development or even survival in the long-run. From HRM perspectives, TSOs would benefit from strategic HRM planning if their managers acknowledge the benefit to organisational performance, and if they possess management knowledge and skills in effectively managing the TSO workforce.

Strategically managing a TSO is considered to be quite complicated and challenging (Kong 2008), the extent varying by the nature of a TSO's mission and objectives. It is "arguably more difficult than in a for-profit or public sector organization…because it requires more knowledge and skills to manage effectively the combination of both paid employees and volunteers" (Kong 2008, 284). Strategic management decisions often aim at enhancing an organisation's competitive advantage in order to achieve a sustainable performance (Kong 2008; Powell 2001). Therefore, achieving competitive advantage is thought to be crucial for organisational development.

Previous studies explored overall TSO management knowledge and skills in managing workforce, how they established their HRM policies and practice, and how CEO perceptions could influence strategic planning and implementation (Hay et al. 2001; Parry et al. 2005; T. Taylor and McGraw 2006; Wilensky and Hansen 2001). Some findings demonstrate that CEO perceptions of the role of HRM influence how CEOs plan and implement HRM. For example, in one study, TSO CEOs lacked management knowledge and skills for enhancing organisational performance. Consequently, they had fewer intentions to improve their management knowledge and skills (Hay et al. 2001) as well as to establish HRM within their organisation (Taylor and McGraw 2006). In addition, HRM practices have different management intentions. Most are "seeking (high) employee performance, others are intended to promote or protect employee well-being" (Woodrow and Guest 2014, 40). Looking

at managing volunteers, the selection of VM practices and the details included in VM practices tend to reflect the CEO's perceived need for VM — that is, a focus on benefiting from volunteers or achieving reciprocal benefits. So while HRM practices in TSOs are similar to those in private sector, there are still important differences between the two sectors, influenced by the financial status of TSOs and the value-led nature of the sector (Parry et al. 2005).

As presented in Chapter One, TSOs unavoidably have to maintain their development in addition to retaining social value. The CEOs of TSOs are considered not to have paid enough attention to organisational and HRM development. Changes in social and market environments urge them to place emphasis on strategically planning and human resource allocating to effectively carry out projects and tasks, many of which are funded TSO core activities. However, most executives are 'forced' to put their attention on HRM as required by the state, which results in incomplete HR practices adoption, such as introducing the minimum level of HR practices simply for 'satisfying the funding body – government' and meeting the institutional requirement (Hay et al. 2001; T. Taylor and McGraw 2006). One reason for such phenomena could be that some CEOs lack awareness, relative knowledge and skills in managing workforce (Wilensky and Hansen 2001).

### 2.2.3 Summary and conclusion

The first part of this section focusses on reviewing theoretical aspects of HRM and then discussing HRM development within the sector. Considering the value-led nature of TSOs, the people contribution is argued to be crucial for their development. However, such recognition does not seem to have been widely acknowledged among TSO managers, CEOs in particular. This tends to lead to inefficient establishment of HRM policies and practices, hence an impact on staff turnover and employee engagement. Such behaviour can only intensify issues created by financial constraints and add more pressure to TSO development and survival (see section 1.2 in Chapter One).

The volunteer workforce is considered an important part of the sector workforce, as shown in section 1.3 in Chapter One. As this section argues a lack of structured HRM for paid workforce across the sector, by extension the management of the volunteer workforce is likely to be in a similar situation. The following three sections (section 2.3.2.4 and 2.5) discuss ways of understanding the role of volunteers and the need for VM from theoretical HRM perspectives. The theoretical aspects discussed are also applied to form a conceptual framework to guide the empirical study (section 2.6).

## 2.3 Volunteers as a strategically important resource of the TSO workforce – a resource based view (RBV)

The key debate of RBV in HRM is considered useful to explore how TSO managers and individual volunteers perceive the volunteer contribution to TSOs, and the need for establishing VM policies and practices. This would help to understand the differences between intended and actual VM implementation, hence, would seem to explain why 'best practice' or 'working model' does not always achieve the intended outcome (Briggs and Keogh 1999; Woodrow and Guest 2014) The RBV in HRM promotes a 'bottom-up' strategic planning (Barney 1991; Barney 2001), which would encourage the development of VM policies and practices that reflect volunteers' needs and TSO needs, i.e. would achieve reciprocal expectations through forming a relationship between the volunteer and TSO. From a contextual perspective, TSO types are diverse. Almost all of them are set up in response to specific social demands; thus, a TSO's mission and objectives could be either narrowly focussed on one particular social service delivery, or broad to serve a wider community (Kong 2008; Liebschutz 1992), matching the discussion in section 2.2.3. TSOs need to recognise many different demands on their resources. 'Sustained competitive advantage' in the RBV perspective of HRM refers more to a sustained workforce, where the workforce is attached to the organisation, hence committed to its organisational success (Torrington et al. 2011).

Under the 'Contract Culture' as discussed in Chapter One, TSOs are in competition with many other types of organisations to win contracts. Therefore, competitive

advantages are considered important for TSOs to obtain more contracts on a sustainable basis (Kong 2008). This view reflects a principal debate of RBV in HRM (Barney 1991; Barney 2001; Boxall 1996; Wernerfelt 1984). Human resource is considered to be crucial in order to utilise and create other physical and organisational resources (Barney 1991). Although the behaviour of human resource is not considered the *only* source of competitive advantages to organisations, "the skills, knowledge, attitudes and competencies which underpin this…have a more sustained impact on long-term survival than current behaviour" (Torrington et al. 2011, 70). Within the third sector, the volunteer workforce has become more and more important, particularly for small to medium sized TSOs. The expansion of services and operations in the sector to some extent required increased diversification in volunteering roles; this also increases the demand for specific skills and knowledge for carrying out the roles. Therefore, a view has been developed that volunteers are not only 'someone nice to have', but a crucial source of productivity for TSOs (refer to Chapter One).

From a theoretical perspective, a RBV in HRM is perceived to best match the context of TSOs, considering their structure and operating nature (not for profit). RBV focusses heavily on resources required for organisational development, and argues that 'human resource' is a key resource to achieve organisational effectiveness. The principal argument of the RBV in HRM supports the view that human resources are 'a source of competitive advantage' (Barney 1991; Boxall 1996; Wernerfelt 1984). The RBV "focuses on the promotion of sustained competitive advantage through the development of human capital rather than merely aligning human resources to current strategic goals" (Torrington et al. 2011, 69-70). To some extent, the RBV is developed from the Contingency Theory by its behavioural perspective (Lengnick-Hall et al. 2009). It emphasises developing and retaining better human resource and organisational process to achieve competitive advantages (Boxall 1998; cited in Lengnick-Hall et al. 2009).

From organisational development perspectives, the volunteering role is created to align with carrying out specific TSO activities. Therefore, a CEO is responsible for

developing the volunteering role as an outcome of strategic planning. Volunteering role specification would then indicate what types of volunteers are needed. A CEO would be able to identify suitable individuals to carry out these roles and then to develop volunteer resources to suit TSO development needs. In this way, a TSO is likely to achieve 'sustained competitive advantage' through sustaining a volunteer workforce. However, 'uncertainty' is claimed to be one key volunteer characteristic (Pearce 1993), as considered in section 1.3 in Chapter One. Therefore, volunteer 'sustainability' should be perceived as sustainability of particular volunteering *roles*, which could be carried out by different individuals. An RBV emphasises organisational resources' contribution to organisational development. In the context of managing volunteers, effectively developed VM policies and practices would support a TSO to develop and retain suitable volunteers (human resources) whose contribution would help to sustain financial resources. This is likely to be achieved by reducing/maintaining staffing cost, maintaining service delivery quality and creating a positive public image. These achievements would help the majority of TSOs survive the impact of Welfare Reform in the short term, hence, sustain organisational development in the long run (refer to Chapter One).

The above analysis indicates the complexity of effectively managing volunteers. This leads to the claim that TSO managers are central to managing the volunteer workforce to facilitate sustainable development. Managed well, the volunteers become a 'sustained competitive advantage' to TSOs (Barney 1991; Wright, Dunford, and Snell 2001). A further argument developed through the literature review is that a volunteer workforce is likely to become a source of 'sustained competitive advantage' if TSO managers pay attention to more than mere volunteer behaviour; managers should focus as well on the aspects which *shape* volunteer behaviour at workplace, such as the development of volunteer skills, knowledge, attitudes and competencies (Kong 2008; Torrington et al. 2011). Thus, this argument seems to draw a link between strategically managing workforce, and managing individual relationships between volunteers and the organisation (Boxall 1992). Consequently, the RBV in HRM aligns the establishment of VM policies and practices to the outcome of their implementation, which is thus facilitated by the extent to which individuals are

supported to fulfil their diverse volunteering expectations and motives. Therefore, this implies that an established and/or formal VM structure (containing policies and practices) is far from sufficient in itself to achieve effective outcome of managing volunteers.

The effectiveness of those outcomes is to a large extent influenced by how the policies and practices are planned and implemented by CEOs and volunteer coordinators (VCs). Therefore, it is considered necessary to seek insights into how managers' attitudes and management styles could influence VM policies, practices, and implementation. These insights can be further gained by building and maintaining the volunteer-organisation relationship (VOR), through making and fulfilling the volunteer (psychological) contract (referred as 'volunteer agreement' in section 1.3.3.3). From the VOR perspective, understanding the process of making and fulfilling the volunteer psychological contract (VPC) would best inform the development and management of this relationship.

Psychological Contract Theory is considered to be suitable to this study, as a well-managed 'psychological' aspect of the contract is likely to enhanced satisfaction and commitment, hence volunteer retention. The 'psychological' parts of the volunteer contract supposedly influence the outcomes of the actual VM (as reviewed in section 2.2.2), and may assume more importance in situations particularly where pay is not a part of a formal contract. From HRM perspectives, the care for employees' psychological well-being is considered to increase the level of employee commitment, enhance employee engagement, hence reduce the employee turnover rate to create a long term benefit to organisational performance (Legge 2005; Macey and Schneider 2008). It serves the purpose of exploring the VOR as it "gives primary attention to the relationship between the favorableness of work experiences and the favorableness of the treatments the organization has obligated itself to provide" (Aselage and Eisenberger 2003, 495). Despite slow development and many critics (Arnold 1996, cited in Conway and Briner 2005; Guest 1999), the Psychological Contract Theory can still be regarded as a key concept in understanding the impact of employment relationships(Conway and Briner 2005). It emphasises obligations born

between the two parties (volunteer and TSO in this context) through reaching reciprocal agreements, hence sharing the same beliefs. In the context of VM the extent to which the contract is fulfilled would shape VOR. The following section reviews the Psychological Contract Theory in detail.

## 2.4 Forming volunteer contracts: a process of making and fulfilling volunteer psychological contracts

### 2.4.1 Why study volunteer psychological contracts?

As mentioned at the end of previous section, it could be helpful to seek ways of assessing how TSO managers' attitudes and management styles influence planning and implementing VM policies and practices, and hence their impact on sustaining TSO performance. This could be explored through understanding how individuals enter a volunteering agreement with a TSO, i.e. how volunteers perceive the help and support received from their managers and the extent to which their managers help them fulfil individual volunteering motives. To facilitate the exploration, the Psychological Contract Theory (Rousseau 1995) is considered suitable, particularly when one focusses on a process of making and fulfilling individual psychological contracts (in this context, a volunteer psychological contract, referred to as the VPC). Understanding the VPC helps unveil how expectations of individual and organisation are met reciprocally, and the impact on the TSO of the contract fulfilment.

From a SHRM perspective, the outcome of fulfilling an individual VPC is facilitated by volunteer coordinators (VCs) implementing VM policies and practices. Thus, a collective outcome of successfully fulfilling VPCs creates impact at organisational level and therefore on overall TSO sustainable development. The individual psychological contract is thought to "affect employees' behaviour toward customers and fellow employees, and also affect their commitment to the organization" (Rousseau and Wade-Benzoni 1994). Psychological contracts are not subject to employment legislation. That is, it is not possible to determine the eligibility and legality of an individual's 'belief' and 'expectation', as psychological contracts tend to indicate how employees behave within organisation, hence are types of employment relationships formed at individual level. Psychological contracts reflect

the accountabilities that two contract makers have towards each other (Mirvis and Hall 1994; Rousseau and Wade-Benzoni 1994; Sims 1994; Spindler 1994). They are held to exist in the contract makers' mind, and are "based on the individual's interpretation of what agreements have been made with the organization beyond those of any formal contract (Rousseau, 1995)" (Liao-Troth 2003, 426).

Psychological Contract Theory suggests how individual work motives and expectations are formed, and in turn influence the employment relationship (Levinson, 1965; Schein, 1972; Rousseau, 1995). It is suitable for exploring the VM context because it describes the management of VOR. In particular, it unfolds the process by which an individual volunteer makes decisions to undertake a volunteering role with a TSO that is, forming her /his volunteering motives and expectations. Along with exploring the process, the Theory also helps to reveal how the ways both volunteers and TSO view volunteerism and the need for VM can influence the outcomes VM planning and implementation, thus implying how VCs could carry out their work to attract and retain volunteers. This echoes the argument that a psychological contract 'governs'/shapes the employment relationship within organisations, including the VOR within TSOs (Armstrong and Murlis 2007; Schein 1972; Sims 1994). It seems to be necessary for managers (i.e. VCs) to understand how individual volunteer expectations are formed. Doing so could enhance VM planning and implementation to stabilise a suitable volunteer workforce.

The VPC is regarded as a key concept to show how volunteers form their beliefs and understandings of their organisation, and therefore agree to join the workforce. The outcome is achieved not only by volunteers accepting the expected commitment; other factors also affect their decision making, such as information about the TSO, and the volunteer coordinator's (VC) management approaches and behaviour towards them. This indicates a relationship between individual volunteers and the TSOs through working with their VCs, echoing a theoretical view of the role of the employment relationship (Schein, 1972).

The process of making psychological contracts through 'promises', 'acceptance' and 'reliance' is applied as a fundamental theoretical framework, as it enables linkages between strategic VM planning/implementation and VOR forming and management. This is considered as crucial to understanding the strategic role of HRM, i.e. the core of SHRM (Boxall 1992). VM planning could be analysed by applying RBV perspectives and is shown in the stage of making 'promises', while the 'reliance' and its impact on sustaining volunteers could be explored by understanding the role played by volunteer coordinators (VCs), in fulfilling the volunteer psychological contract. Section 2.5 of this chapter provides a focussed review of the role of VCs as line managers in the VM context. It highlights the fact that within a TSO both volunteer psychological contracts and employee psychological contracts exist. But the primary focus of this study is the *volunteer* psychological contract (VPC), as it is held to be a key to VM planning and implementation.

**2.4.2 An expanded review of the Psychological Contract Theory**

**2.4.2.1 Contract terms and contract types**

Broadly speaking, the two major psychological contract types are transactional and relational (Conway and Briner 2005; Rousseau 1995); and sets of transactional 'time frame' and relational 'performance requirements' terms are seen as the basis for fulfilling the contract (Rousseau 1995). Table 2.1 below summarises lists of transactional and relational terms. The two sets of terms fall on two ends of a spectrum, i.e. transactional or relational (Macneil, 1985; Rousseau, 1989, cited in Rousseau, 1995 as figure 4.1, p.92).

Table 2.1 summaries of transactional and relational contract terms

| Transactional terms | Relational terms |
|---|---|
| Specific economic conditions as primary incentive | Emotional involvement as well as economic exchange |
| Limited personal involvement in the job | Whole person relations |
| Closed-ended time frame | Open-ended time frames |
| Commitments limited to well-specified conditions | Both written and unwritten terms |
| Little flexibility | Dynamic and subject to change during the life of the contract |
| Use of existing skills | Pervasive conditions |
| Unambiguous terms readily understood by outsiders | Subjective and implicitly understood |

Summarised from Rousseau (1995), 91-92

Over the years, several scholars have contributed to developing this theory, including Argyris (1960), Levinson et al. (1962), Kotter (1973), Schein (1980), and Rousseau (1989) (discussed in Conway and Briner 2005). As outcomes of individual interpretation, psychological contract types tend to vary depending on how explicit the contract terms are (Conway and Briner 2005; Rousseau 1995). Transactional terms are considered more explicit, while the more implicit relational terms are often described as "bundle of unexpressed expectations that exist at the interfaces between humans" (Spindler 1994, 326). They are thought to be more ambiguous and open ended, likely to be influenced by individuals involved in the contract relationship, i.e. VCs and volunteers in VPC context. Various scholars have developed the Theory with different focuses, as reflected in their definitions. Appendix 1 is a table summarising key definitions. These contain concepts of 'expectation', 'promise' and 'obligation' to various extents. These terms are considered to be 'beliefs' which constitute psychological contract contents (Rousseau 1995; Conway and Briner 2005).

In the VPC context, it is argued that transactional terms could refer to arrangements for the expected volunteering period, frequency and the training for carrying out the work; while relational terms might be the support to promote the volunteers' personal development and well-being during their participation. Relational terms are seen as influencing how VCs develop and maintain relationships with their volunteers. It is further argued that fulfilling relational terms is likely to increase volunteer commitment and engagement, since it brings volunteering satisfaction, and satisfaction is achieved by meeting diverse volunteer motivations (e.g. Warner, Newland, and Green 2011).

> "Relational contracts…are broader, more amorphous, open-ended, and subjectively understood by the parties to the exchange. They are concerned with the exchange of personal, socio-emotional, and value-based, as well as economic resources. Relational contracts are characterized by trust and belief in good faith and fairness, and involve exchanges with longer-term time frames such as the exchange of employee commitment for job security (Rousseau 1990)." (Conway and Briner 2005, 43)

As discussed in the previous chapter, the character of volunteer behaviour within organisation reflect 'uncertainties' (Pearce 1993) 'Uncertain' volunteering length is commonly acknowledged, as there is little restriction on how long a volunteer has to stay. Although it is ideal for TSOs to have long-term committed volunteers, in reality they find it more and more difficult to keep their volunteers longer (Billis and Harris 1996); (Nickson et al. 2008). Hence the argument that TSOs should manage and support volunteers effectively to retain them.

**2.4.2.2 about contract makers**

The two major types of contract makers are principal and agent (Rousseau, 1995). Principals refer to the actual employer and employee, e.g. shop owner and shop assistant. Agents usually refer to employer or employee's representatives such as managers, or recruitment agents who, as external parties, act as representatives of principals to carry out recruitment and selection. In the VM context, contract makers from the TSO could be either principal or agent. This might depend on TSO size, in that CEOs from small TSOs tend to be responsible for managing volunteers directly, while medium to large TSOs are likely to have assigned project managers and volunteer managers. It is likely that TSO agents could influence how an organisation's 'promise' is perceived by volunteers. This is because different agents would interpret and communicate the organisation's strategy differently due to differences in personality and perception (Fincham et al., 1999; Furnham, 2005).

Volunteers' commitment levels appear to be less influenced by financial gain and career progress than by recognition and self-actualisation (Warner et al, 2011; Coyne and Coyne, 2001). Relevant literature indicates that volunteer motivation ranges from giving back to society to enhancing employability (Kim et al, 2010; Clary et al, 1998; Farmer and Fedor, 1999). Effective volunteer psychological contract content is thus considered to consist of more intangible factors, difficult to specify and measure, and highly individualised. This increases the level of complexity in VM. As there are fewer standards or rules to define and regulate psychological contract making, VCs

consequently carry more responsibility in seeking the best approaches to effectively manage and support volunteers.

**2.4.2.3 Reviewed existing research on VM using the Psychological Contract Theory**

An account of previous study findings regarding volunteers and VM is discussed in section 1.3.3. Volunteer motivation has been much researched in order to support VCs. While this is acknowledged to be important, there are also other needs to recognise such as what VCs should do to *keep* volunteers motivated. Statistics show that large numbers are involved in volunteering activities in various forms each year (see chapter One), but these annual numbers do not capture the degree of *sustained* volunteers and volunteering roles. Volunteers are regarded as 'uncertain' (Pearce, 1993), thus, it seems insufficient if VCs merely understand what their volunteers' motivations are. Further management and support actions are argued to be necessary to effectively meet volunteers' expectations (Warner et al., 2011). Studies on VM are sparse, but the Psychological Contract Theory has been applied by scholars when they conduct research into effective VM (e.g. Farmer and Fedor 1999; Taylor et al. 2006; Blackman and Benson 2010; Stirling, Kilpatrick, and Orpin 2011). It is regarded as a particularly useful tool to help VCs to "better understand and manage volunteers' contributions to their organizations" (Farmer and Fedor, 1999, 349).

Some study findings indicate that volunteers tend to be motivated under a relational psychological contract (Blackman and Benson 2010; Farmer and Fedor 1999; Stirling, Kilpatrick, and Orpin 2011). This contract type is thought to better reflect volunteers' motivation and their expectations towards their TSOs. People volunteer under flexible forms, and are not expected to commit themselves to such long working hours as those in paid employment. Psychological contracts are able to capture such flexibility, being able to reflect individuals' implicit expectations towards their organisations (Cullinane and Dundon, 2006). Volunteers expect to fulfil their motivations and to receive recognition and respect from their TSOs for their contribution (Stirling et al., 2011). However, few of these studies offer an insightful view of how the volunteer psychological contract was made and fulfilled;

instead they tend to focus most on the outcome of the contract fulfilment. Arguably, making psychological contracts would also have an impact on how contracts were fulfilled. CEO and VC perceptions are seen to stress how organisational information is organised. To a large extent, that information has implications as regards organisational image (Rousseau, 1995). Thus, CEOs and VCs seek to influence how information is communicated in order to draw public attention and attract more volunteers.

Moreover, it is argued that violating the psychological contract might not necessarily lead to only negative impact, but could actually be seen as a necessity in engaging and retaining volunteers (Rousseau and Robinson 1994). That is, formal establishment of VM practices should facilitate meeting volunteers' expectations. If VCs implement their VM practices in a consistent manner, they would be likely to shape their volunteers' primary motivation and expectation. Should such effective VM lead to changes in their volunteers' motivation and expectations, the original psychological contract terms are bound to be violated in order to maintain good VOR. Furthermore, TSOs are required to undertake internal development and change in order to adapt to external development and wider institutional changes. Such changes would also cause volunteer psychological contract violation, yet be equally necessary and positive.

### 2.4.3 The volunteer psychological contract – a 'mental model'
#### 2.4.3.1 Overview
As discussed in section 2.3, a key perspective of SHRM is to explain the relationship between strategic management and employee relations (Boxall 1992). This is considered to exhibit three stages of a 'Mental Model' (discussed below) in forming the psychological contract.

Psychological Contract Theory offers a conceptual layout to explore employment relations within organisations, but can only contribute to organisational performance if the employee psychological contract is established to meet organisational strategic needs. This argument is supported by a theoretical claim as to how employment

relations influence organisational performance, particularly when the organisation is considered as a social institution (March and Simon 1958). Rousseau (1995) developed a framework to illustrate how business strategy is linked to the psychological contract (Rousseau 1995, 193, Figure 7.2). It offers a foundation to display the relationship among strategy, HR contracts and employment relations. Details on constructing the framework based on Rousseau's work are provided in section 2.6 of this chapter.

The arguments by Rousseau (1995) are primarily adapted to building a conceptual framework because her work

> "is widely acknowledged as having had the greatest influence on psychological contract research since the writings of Levinson and Schein. Her article (1989) marked a fundamental shift in understanding the meaning and functioning of the psychological contract and how it could be empirically investigated" (Conway and Briner 2005, 14).

Rousseau (1995) refers to the psychological contract as a "Mental Model", in which the terms of 'promises', 'acceptance' and 'reliance' are applied to indicate different stages by which an individual interprets and understands organisational promises, before forming 'beliefs'. "*A contract is a mental model that people use to frame events such as promises, acceptance, and reliance*" (Rousseau 1995, 27). The 'beliefs', formed as results of the three stages are based on the interpretation and acceptance of the 'promises' made to individuals. Individuals within the same organisation can still form different psychological contracts.

> "The promises that make up contracts have no objective meaning. Promises ultimately are perceptions of what was sent and what was meant. Perceptions are not simply passive interpretations of reality; people create their meaning for many events. The close supervision one person sees as controlling may seem supportive and helpful to her [co-worker]" (Rousseau 1995, 27)

The meaning of the 'promises' described above to some extent is similar to the argument raised in signalling theory (Spence 1973; Spence 2002). This is because a key view of signalling theory from HRM perspectives is that it helps understand how different HR practices influence the formation of both types of contracts

(employment and psychological contracts) (Suazo, Martinez, and Sandoval 2009; Gregory, Meade, and Thompson 2013). Such a view to some extent helps explain how two contract parties (individuals and their organisation) receive and interpret different information, but this does not really explain how individual perceptions can influence the interpretation of the information. As a core of this theory fundamentally deals with "*information asymmetry* between two parties" (Connelly et al. 2011, 40), this argument does not seem to recognise the individualistic nature of making a psychological contract, and thus this theory cannot help in revealing what influences the making and fulfilment of a psychological contract. Differing from signalling theory, Rousseau's 'Mental Model' process indicates that different factors influence the formation and fulfilment of the psychological contract (Rousseau 1995). Two ranges of factors have an impact —"external messages and social cues from the organization or social setting and the individual's internal interpretations, predispositions, and constructions"(Rousseau 1995, 34). External messages and social cues come from the organisation, public media and other people who work in the organisation or in the sector. All available information is produced under influences of (diverse) individual views and interpretations, i.e. perceptions.

Figure 2.1 below provides a brief illustration of the volunteer 'Mental Model'. The model unfolds a process of collecting, interpreting, understanding and accepting information received from various channels at individual level, hence forming a volunteer psychological contract (VPC). A VPC connects an individual volunteer to a TSO on the ground that they will meet the other's expectations to bond the VOR. TSO 'promises' are perceived to indicate organisational needs for volunteers including strategic needs.

Figure 2.1 – A brief illustration of 'Mental Model' process in the context

| | | |
|---|---|---|
| - TSO manager **'promises'** to offer support and management.<br><br>- Volunteer **'promises'** to committee to volunteering work | - Volunteer **'accepts'** TSO terms and 'promises' after obtaining and understanding TSO related information, hence forms 'beliefs' that TSO would keep their promises<br><br>- TSO manager **'accepts'** volunteer's 'promises' to commit to the task hence forms 'beliefs' on volunteer commitment | - Volunteer **'relies'** on TSO to keep promises and expect the VC to fulfil all agreed contract terms<br><br>- VC **'relies'** on volunteer to keep promises and expect the volunteer to commit to agreed task |

*The figure was adapted from Rousseau (1995), p. 29. But it was re developed to suit the context of forming a volunteer agreement*

**2.4.3.2 Individual perceptions, external messages and social cues- influential factors in making the contract:**

Perceptual influence has been widely discussed from an organisational behavioural perspective (e.g. Schein 1972; Fincham, Rhodes, and Fincham 1999; Furnham 2005). Psychological Contract Theory recognises that individual perception plays an important role in forming and fulfilling psychological contracts. In the VOR context, individuals who represent a TSO produce information such as the mission and objectives of the TSO, descriptions of core activities, annual reports of organisational performances and achievements, and all policies and practices. How the content is organised reflects different interpretations of organisational needs and expectations, referred as 'external messages' (Rousseau 1995). In addition to these messages, individuals' decisions as to forming the psychological contract tend to be influenced by other people's views and attitudes towards the role and the organisation referred as 'social cue'. These people could be from personal social circles such as friends and family members, or from the organisation such as managers and co-workers, (Rousseau 1995). However, the individual's perceptions have an effect on how the

external messages and social cues are interpreted and used in making the psychological contract (Rousseau 1995).

Because CEOs and VCs represent their TSO, they are obliged to protect the organisation and to contribute to achieving organisational objectives. Therefore, their perceptions are embedded in established TSO information for promoting a positive organisational image and for recruiting and engaging more suitable people (as employee and volunteer). However, it is argued that TSO organisational structures are much more flexible than private sector organisations. As discussed in Chapter One, with no requirement and standards to follow as to how to structure TSO, CEOs and VCs have more autonomy as regards structure and what management practices to adopt. Perceptual influences thus would have more influence on organisational structuring in the TSO setting. While one could celebrate such freedom, it also leads to more challenges to managing people, particularly managing volunteers (see section 2.2).

### 2.4.4 Summary

Exploring the VM concept using Psychological Contract Theory is considered to add further understanding of the role of the psychological contract to explaining how actual HRM may differ from the intention. The theory is useful to explain the relationship between strategic management and employment relations (Boxall 1992); this tends to highlight the important role individual perception plays in the actual outcome of planning and implementing VM policies and practices. Individual perception plays an influential role in making the psychological contract through different events (making 'promises', reaching 'acceptance' and fulfilling via 'reliance'). Therefore, the empirical findings of this study should demonstrate the value of the theory in showing that SHRM is important to the improvement of organisational performance.

To comprehend the impact of the volunteer psychological contract on VM, one should understand how and why the contract is established, how the contract is implemented and how such implementation influences TSO performance. Thus, it is

held to be insufficient if one only studies the psychological contract without positioning it into 'a bigger picture' within the TSO. As discussed in section 2.3 in this chapter, RBV perspectives in HRM enable the making of volunteer psychological contracts to be part of a process of strategic volunteer workforce planning and implementation. Furthermore, this highlights the influence of TSO managers (CEOs and VCs) in making the volunteer psychological contract. VCs, who are directly responsible for the volunteer workforce, have heavy influence in the actual VM. The next section thus explores this in depth.

## 2.5 Volunteer coordinator (VC): a volunteer line manager

The volunteer coordinator (VC), acting as the 'agent' of the TSO, supposedly conveys the TSO 'promises' ('external messages') to potential volunteers in order to persuade them to join. Line managers refer to "those managers to whom individual employees or teams directly report and who have responsibility to a higher level of management for those employees or teams" (CIPD, 2012). From this perspective (Lishman and Wardell 1998), the VC is considered to be the volunteer line manager in managing the volunteer workforce, as well as the contract maker representing the TSO in the VPC process. From the SHRM perspective, line managers are considered to have impact on the actual HRM (Khilji and Wang 2006; Woodrow and Guest 2014), which in turn influences the relationship between employees and the organisation. Therefore, to explain the relationship between strategic management and the employee relations, it is necessary to understand the role of the line manager in HRM. This section starts by reviewing general literature before applying it to the context of the volunteer line manager.

### 2.5.1 General review of HR devolution to the line

Some academic studies suggest that the HRM function should be returned to line managers, as they are responsible for people management (Purcell et al., 2003). In fact, discourse on line manager involvement in HR roles was noted in relevant literature back in late 1980s (Guest 1987; Guest 1997). Their HR involvement gradually increased over the years, and most European organisations have laid out structures in which line managers share some HR functions, mainly at compliance

level. To some extent, the following reasons are thought to explain such management phenomenon (Larsen and Brewster 2003):

- To reduce cost
- To provide a more comprehensive approach to HRM
- To place more responsibilities for HRM with the managers most responsible for it
- To speed up decision making
- To act as an alternative to outsourcing the HR function

As a key HR function within an organisation, HRM compliance focusses on recruitment and selection, pay and reward, performance management, training and development.  HR function specification has meant more and more HR professionals become involved in strategic HR planning (Ulrich 2009), and line managers have increasingly been given HR responsibilities in order to support effective HRM implementation across all levels (Frank and Taylor 2004). Previous research findings indicate that employees normally see their line manager's management style as a reflection of the organisation. Thus their management styles directly affect employees' engagement level, which in turn has significant impact on employee retention. "Recent research indicates a linkage between leadership retention competencies, attrition, job abandonment rates, engagement as reflected by measures of team member satisfaction, and other on-the-job performance measures"  (Frank, Finnegan, and Taylor 2004, 20).

While it is acknowledged that organisations would benefit from HR devolution to the line in respect of performance improvement, some study findings also point out that having such a notion in place does not necessarily lead to the successful outcome expected (e.g. Cunningham and Hyman 1995; Cunningham and Hyman 1999; McGovern et al. 1997). From an organisational behavioural aspect, it is held that line manager' attitudes and their approach to implementing HR practices are influential. These two behavioural factors would affect how employees perceive the importance of HR practices (Guest 1987). From a strategic HRM perspective, it is thought that

HRM planning should be integrated into strategic planning activities at corporate level (ibid).

> "Human resources must therefore become an integral component of the strategic planning process. Because they are the most variable, and the least easy to understand and control of all management resources, effective utilization of human resources is likely to give organizations a significant competitive advantage. The human resource dimension must therefore be fully integrated into the strategic planning process." (Guest 1987, 512)

Such argument implies the important HR roles of line managers, front-line managers in particular, as they are directly responsible for employees at operational level, and their managerial performances influence employees' perception of the organisation as a whole (Purcell and Hutchinson 2007; Gilbert, De Winne, and Sels 2011b; Gilbert, De Winne, and Sels 2011a). Previous research findings emphasise, to various extents that line managers hold mixed views on their HR responsibilities, which also influence their relationships with internal personnel/HRM professionals (Cunningham and Hyman 1995). Therefore, HR devolution to the line is perceived to be a crucial people management approach in contemporary organisations, and the level of its effectiveness to large extent depends on how line managers perceive the importance of HRM as a whole.

**2.5.2 An overview of VC roles and responsibilities: volunteer line manager**
Extended from the review of SHRM in sections 2.2 and 2.3, the activities of VM implementation are considered to be carried out by VCs. They could be referred to as volunteer line manager, based on their role and responsibilities (Lishman and Wardell 1998). They provide support and supervision to ensure volunteers undertake assigned work for TSOs. Within a VPC, the role of VC is considered crucial for TSOs to benefit from the volunteer workforce. Consequently, it is necessary to understand VC behaviour and attitudes both as regards the contribution made by volunteers, and the need for VM. The VC's perception influences how a VPC is made and fulfilled (in line with the review of manager as the contract maker) (Rousseau 1995). The VC is in fact a line manager working in a not-for-profit organisational context. Therefore, this study explores the volunteer line manager

based on the theoretical claim of HR devolution to the line. Through this research, it intends to add empirical evidence to demonstrate the important role of the line manager in creating effective implementation outcomes.

Good employee relations are thought to have a positive effect on productivity and work performance. Because line managers are chiefly responsible for relationship building and sustaining (Purcell and Hutchinson 2007), their attitudes and level of understanding of HRM's contribution influence how policies and practices are implemented, and how employment relationships are developed and maintained (Gibb 2003; Maxwell and Watson 2006; Gilbert, De Winne, and Sels 2011a; Gilbert, De Winne, and Sels 2011b). The VC can be considered as a line manager with responsibilities of managing and supporting the volunteer workforce, due to their similarities in roles and responsibilities. The VC is both supervisor and personnel manager (Lishman and Wardell 1998). It is further argued that the VC role is more complex than the line manager of paid employees, owing to the complexity of the volunteering role and the sector (ibid). As discussed in 1.3 in Chapter One, volunteering motives and expectations are diverse and vary from one individual to another (Allison, Okun, and Dutridge 2002; Clary and Snyder 1999; Clary et al. 1998; M. Kim, Zhang, and Connaughton 2010; Okun 1994); this tends to create challenges for TSOs to effectively manage the workforce and brings out the need for VM skills beyond just fulfilling volunteer expectations at individual level (Warner, Newland, and Green 2011).

As previously mentioned, the VC acts as both supervisor and personnel manager (Lishman and Wardell 1998). Due to increased demands for training and management structures to support volunteers within third sector organisations (TSOs) (see section 2.2.4), VCs' duties are more and more similar to those of line managers of paid employees. There is acknowledgement that human resources are the most difficult resource to manage and control, but the complexity increases with volunteer resources, because of their distinctive characteristics.

> "…'sheer diversity of organisations sheltering under the voluntary sector umbrella makes it impossible to define or prescribe a generally applicable set

of management procedures or organisational systems'. As Hedley (1992a) concludes 'managing volunteers is, in many cases, more difficult and requires more skills, than managing paid staff'" (Bastleer, 1995, cited in Lishman and Wardell 1998, 6).

One factor which adds more complexity to the VC role is the diversity of VC roles and responsibilities across different TSOs, caused by various TSO objectives and core activities. Consequently, the VC title is a term which does not provide specifications. Many titles are used under the broad category of VC, such as 'project worker', 'project leader', 'development worker', 'volunteer manager' and many more (these titles were selected from the 12 identified in Lishman and Wardell 1998). Different titles also imply that VCs have responsibilities in addition to merely managing and supporting volunteers. Project coordinating and finance and fundraising responsibilities are commonly assigned to VCs (ibid). Also, VCs in small to medium TSOs are very likely to take on more responsibilities, due to limited human resource capacity (refer to Chapter One).

### 2.5.3 Existing research on the role of the VC

Previous studies exploring the role of the VC are rather limited, even though some academic papers discuss the role of the VC directly or indirectly (Pearce 1993; Smith 1996; McSweeney and Alexander 1996; Lishman and Wardell 1998; Leonard, Onyx, and Hayward-Brown 2004). For example, the study conducted by Lishman and Wardell (1998) focussed on the Scottish voluntary sector. While its findings provide good insights to the role of VC in Scotland, the study was commissioned by the Scottish Office and the report was generated only to offer empirical evidence to practitioners and policy makers. It is not conducted by applying any theoretical framework, much less HR related theories. Another study exploring perspectives of both volunteers and coordinators in managing women volunteers (Leonard, Onyx, and Hayward-Brown 2004) identified eight areas of concerns that volunteers have about VM policies and practices. But this study pays little attention to the *impact* on VM of understanding volunteers' concerns, despite highlighting the importance of attitudes of both volunteers and coordinators.

> "It is therefore essential that if high levels of volunteering are to be maintained, there must be some congruence between the coordinator's and the volunteers' attitudes to their management." (Leonard, Onyx, and Hayward-Brown 2004, 206)

Overall, research findings seem to support the argument of HR devolution to the line, and data collected in the TSO environment present strong evidence to confirm that VC roles are similar to the line manager role. Furthermore, the crucial importance of line managers' supervision and people management responsibilities are similar to VC's responsibilities (Guest 1987; Cunningham and Hyman 1995; Purcell and Hutchinson 2007; Lishman and Wardell 1998). Volunteers, although not subject to paid conditions, are considered to be an important workforce in the sector in terms of organisational development. Changes in the social and political environment also demand that TSOs manage volunteers using formal HR practices such as recruitment and selection, training and development, as well as performance review (McSweeney and Alexander 1996; Lishman and Wardell 1998). Therefore, it is justifiable to apply the theoretical view of HR devolution to the line to the VC role and to explore similar issues e.g. how VC attitudes and approach to implementing practices could influence volunteers' commitment (Guest 1987; Purcell et al. 2003).

### 2.5.4 Summary

Reviewing the role of the VC (as the volunteer line manager) shows that the VC has direct responsibility for managing and supporting the volunteer workforce, this shows that outcomes of the actual VM rely on the VC, who manages the volunteer workforce through implementing VM policies and practices. Her/his perceptions of the need for VM are thus considered to influence how the volunteer workforce is actually managed and supported, hence how the volunteer-organisation relation (VOR) is managed. The outcomes of the actual VM by the VC can also be seen as the outcomes of the VPC fulfilment. Thus, the VC's work has a crucial impact on the level of volunteer engagement and retention.

So far, this chapter has provided detailed reviews of the RBV perspectives in HRM, the Psychological Contract Theory and the debate about the role of line management in HRM. These three are used to develop the conceptual framework for this study.

The next section provides detailed accounts of the construction of the framework before proposing research objectives, aims and questions.

## 2.6 Constructing the conceptual framework of the study

Previous research on VM issues is narrowly designed by applying only psychological contract types (see section 2.4 in this chapter). This tends to re-emphasise the importance of understanding volunteering motivations, but does not acknowledge the importance of taking effective actions following from that. It now seems useful to explore how TSOs embed the understanding of volunteer motivation into planning and implementing their VM practices. TSOs have recognised such a need. A crucial part of this is to understand what influence individual perceptions have on VM, and on the VPC making and fulfilment.

In this exploration, the reciprocity referred in the Psychological Contract Theory could help better understand the need for effective VM. The beliefs referred in the Theory are shared between volunteers and their TSOs, while both parties have expectations of each other. It would be productive to examine VM effectiveness from both sides by studying how individual perception affects sharing beliefs and fulfilling psychological contracts. Thus, not only should volunteers' perception be looked at, but attention would also need to be given to TSO managers' (both CEO and VC) perceptions. As mentioned in section 2.4.3.1, Rousseau's figure (1995, 193, figure 7.2) was adapted to fit in the context of this study, so as to better reflect relationships in the external social and economic environments, TSO strategies and established VM practices. This section provides a detailed view of how the framework is constructed, starting by describing in detail the three stages of making 'promises', deciding 'acceptance' and fulfilling via 'reliance'.

### 2.6.1 Stage one: making 'promises'

The external environment influences how TSOs form organisational strategies designed to meet objectives, increase public reputation and attract more volunteers. These strategies determine what types of activities organisations need to carry out, and hence whether or not volunteers are needed. If the TSO's activities require

volunteers to contribute, VM practices are developed and/or adopted to attract suitable individuals to carry out that work. The above argument assumes that TSOs usually communicate their organisational strategies and core activities at the stage of making 'promises'. Such information is reflected throughout organisational information as well as other public accessible media. The initial study findings have identified that more than one core activity can be undertaken within one TSO. Many of these core activities are commonly funded through independent financial sources, rather than by TSO central funds. Similarly, not all activities in one TSO require volunteers. Thus, it is necessary to specify the type of activities that volunteers are needed for when TSO managers make 'promises'. VM practices are developed to suit the specific needs of carrying out these activities, and VC and/or activity leaders have individual requirements from volunteers. Figure 2.2 below presents the 'promise'-making stage in a more detailed way.

Figure 2.2 – Detailed illustration of 'promises' making
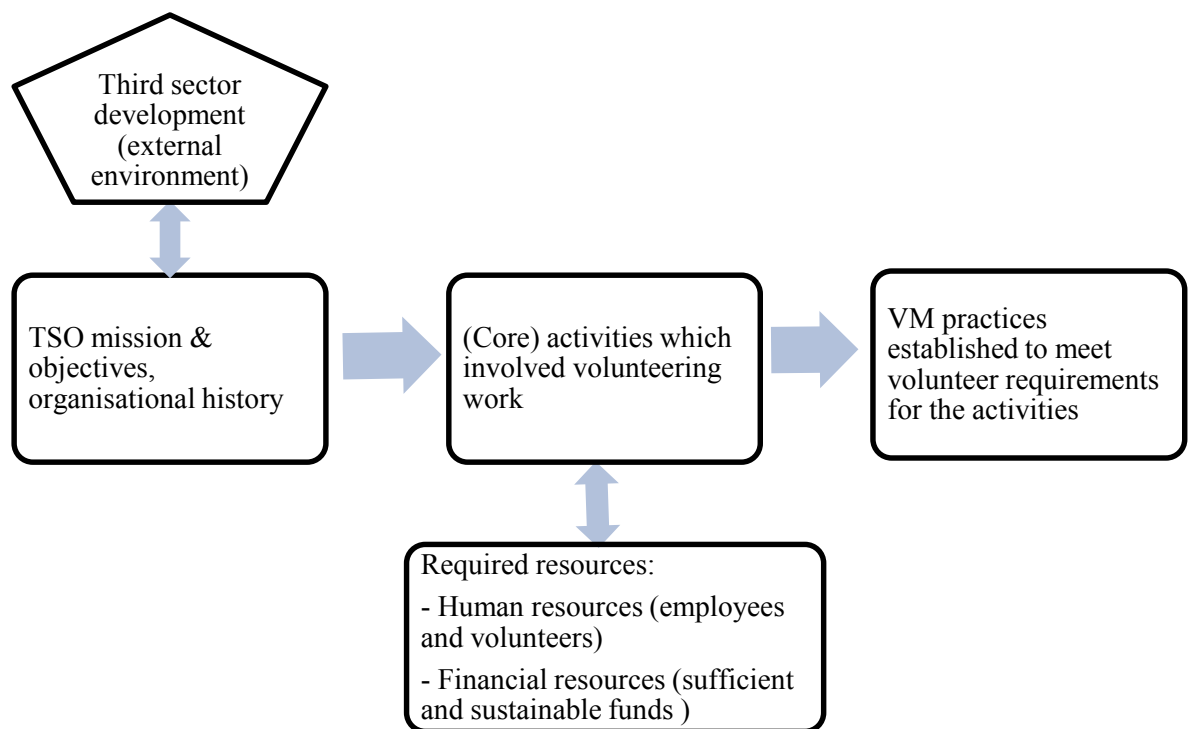


## 2.6.2 Stage two: reaching 'acceptances'

As discussed in section 2.4.2.2, TSOs and volunteers are 'principals' in the psychological contract-making (Rousseau 1995, chapter 3). Only in rare cases do

volunteer agents negotiate work on volunteers' behalf, so the volunteering individuals themselves are usually active in the process of VPC-forming.

The process of making a psychological contract is thought to unfold through a series of events following a specific sequence (Shaw and Jarvenpaa 1997, cited in Conway and Briner 2005, chapter 8). 'Events' here refers to an individual mentally processing the information contained in 'promises', and then forming 'beliefs' about it through interpretation, predisposition and construction.

'Beliefs' is used here in its contractual meaning — "believing one has made a commitment and is therefore bound to some future action" (Rousseau 1995, 23), a definition which describes well the acceptance of the mutual 'promises'. To a large extent, the internal process the psychological contract makers undergo in the construction of 'beliefs' are influenced by their perceptions (Rousseau 1989; Rousseau 1995; Rousseau 2001). In the 'mental model' of the contract making process, these internal processes happen during the stage of 'acceptance' — 'acceptance' of the other party's 'promises' indicates that 'beliefs' have been formed. In the context of this study, the volunteer's 'beliefs' may be viewed as judgements about the extent to which the contract should be fulfilled by VCs. The true contract fulfilment is assumed to vary depending on the actual VM implementation in a TSO.

Broadly speaking, the internal processes of belief-forming (and ultimately acceptance) are mental processes which shape the contract-makers attitudes, and influence their behaviour towards establishing a VOR. This internal process is divided into two big steps — 'encoding' and 'decoding'. During the 'encoding' (see figure 2.3 below), an individual interprets the information received from the TSO and other public sources to identify 'promises' from the organisation, referred to as 'encoding'. To form a view of what the TSO expects, the individual applies self-expectation informed by 'cognitive biases' and specific 'motives', regarded as 'predisposing factors' (Rousseau 1995, 43). S/he then applies self-analysis with respect to behaviour required by the organisation, and constructs an understanding of expected work performance in exchanging organisational support, referred to as

'decoding' (Rousseau 1995, 43-45). By the end of the stage of reaching 'acceptances', the volunteer has formed a complete set of beliefs as to what and how she/he should do to meet the TSO's expectations.

In the context of making a VPC, the expression 'social cues' is being used to refer to views from friends, other volunteers or people from the TSO; this interpretation is extended from the original definition (Rousseau 1995, 39). It is widely acknowledged that human beings are social animals as we live in a sociable environment - the society. Thus, an individual's decision on volunteering is influenced by her/his friends' views on volunteering, even if such sharing of views does not directly pertain to recruiting. People from the TSO could be paid employees, clients or former volunteers and ex-employees. It is thought that 'social cues' provide additional information to an individual and help her/him interpret organisational information. Thus, messages received from other volunteers and TSO people influence how an individual 'decodes' TSO information (as shown in Figure 2.3).

Figure 2.3 - Internal process of 'Acceptance'
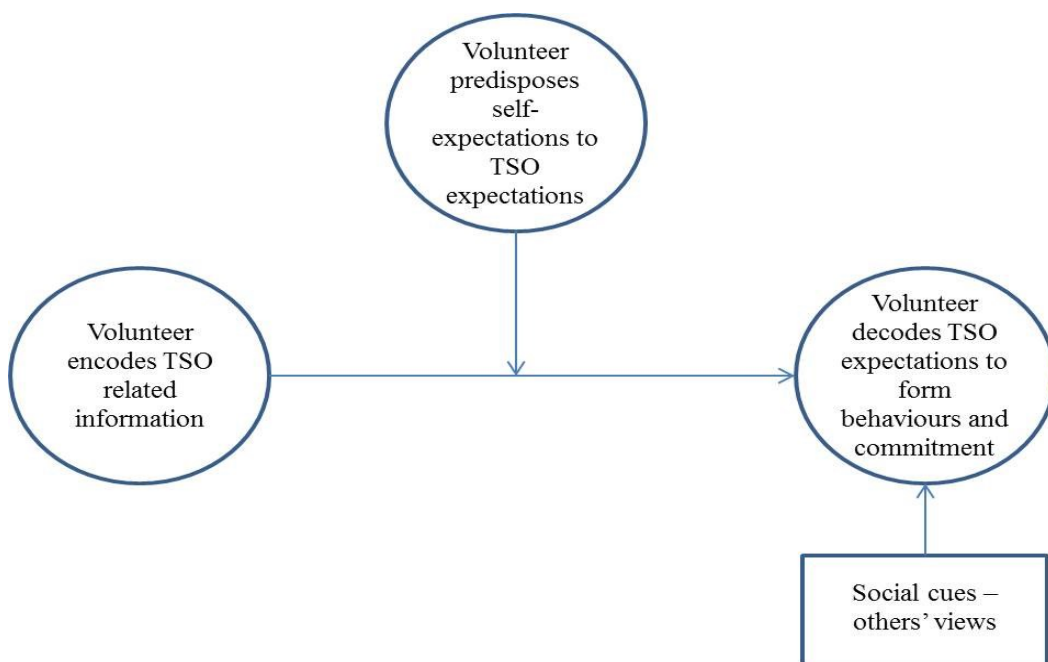


Adapted from Rousseau (1995), 33

People tend to tell others about their volunteering experience; hence, a positive volunteering experience would be likely to attract more people to volunteer with the TSO, while a negative experience is likely to discourage people. This in turn would have a negative impact on the TSO's public image. TSOs commonly use informal referral as a mean of recruitment and selection. Therefore, this further confirms that 'social cues' could help to shape volunteer's perception of how to 'decode' organisational information, hence, how they form their attitudes towards volunteering with the TSO.

### 2.6.3 Stage three: fulfilling via 'reliance'

The 'reliance' stage is considered to be the stage when the VPC is fulfilled. After making 'promises' and 'accepting' both parties' expectations and obligations, 'beliefs' are formed which indicate a mutual trust as regards keeping their 'promises'. On the TSO's part, VCs commonly have direct work relations with volunteers, and they are the ones to ensure that all contract terms are met and all 'promises' made by the organisation are kept. 'Reliance' is based on a mutual trust that the contract's terms will not be violated under normal circumstances. Thus, any sign of contract term violation is likely to cause withdrawal behaviour from the other party. That is to say, a volunteer will not stay engaged to the organisation and committed to the work if she/he feels the TSO or VC fails to keep their promises, and vice versa. If agreement of contract terms is violated, it could lead to work termination before the end of the agreed volunteering period. From theoretical perspectives of employee relations, psychological contract violation could break relationships between individual and organisation, hence in VM context breaking the VOR.

At the 'reliance' stage, a VC's role is perceived to be crucial, because s/he works closely with volunteers, and is directly responsible for supervising and supporting volunteers to carry out work. Therefore, although there are established VM practices, it is suggested that a VC's perception affects how terms should be met, and how a volunteer's work performance should be measured. Arguably, the VC is required to be especially people oriented in managing and supporting volunteers, due to a lack of legal frameworks and standardised criteria to judge successful VM outcomes. It is

further recognised that VCs often have other responsibilities such as fundraising and managing projects. These roles share similarities to middle manager roles in private sector organisations. Thus, it is thought that theoretical perspectives on HR devolution to the line could be applied to understand the VC's role in VM implementation (Cunningham and Hyman 1995; Whittaker and Marchington 2003; Purcell and Hutchinson 2007; Gilbert, De Winne, and Sels 2011a; CIPD 2013).

**2.6.4 The conceptual framework – linking strategic VM to the VPC**

Understanding the VPC in this study is guided by the 'Mental Model' process (Rousseau 1995), as shown in section 2.4.3. The outcome of psychological contract fulfilment is considered to rely on the extent to which volunteers and VCs keep the 'promises'. As discussed in Chapter One, the VC's attitudes and behaviour towards VM implementation would directly influence a volunteer's levels of engagement and motivation. The VOR largely relies on the level of reciprocal trust, and influences the quality of VM activity. Consequently, outcomes of 'reliance' would indicate how successful TSO strategies are, and to what extent the TSO mission and objectives are met. The outcomes of planning volunteering roles and VM within the TSO, possibly conducted strategically by CEOs, are regarded as external factors (Rousseau 1995). They offer individuals essential information on the work they will do as volunteers; hence, they mark the start of forming a VPC. Figure 2.4 below illustrates the process with the VPC-making embedded in the TSO planning stage; it highlights the potential benefit of VPC fulfilment to TSO development.

Figure 2.4 the conceptual framework developed



Conceptual Framework
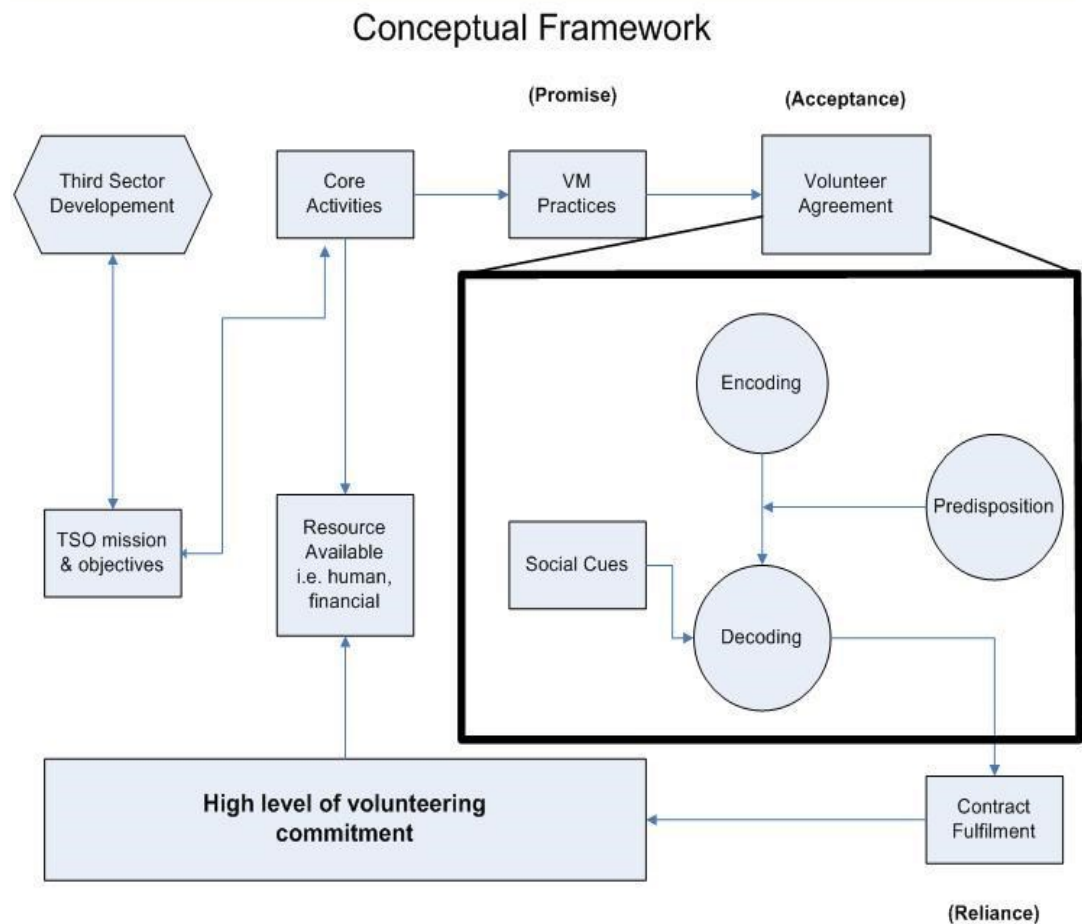
Adapted from Rousseau (1995) p. 193 Figure 7.2

Figure 2.4 illustrates the influence from three parties: 1) the sector (as shown in the hexagon), 2) the TSO (as shown in rectangles), and 3) the volunteer's internal processes defined by Rousseau (1995, 40) (in circles). A volunteer's internal process is expanded in the bold black frame, describing how a volunteer interprets external information and (re)constructs its meaning: "messages individually receive and the way individuals interpret this information influence the contract they create more than the messages that were sent" (Rousseau 1995, 40). The process leads her or him forming 'beliefs' to make the VPC. The three parties play different roles in the three stages of making and fulfilling their psychological contract (labelled as 'promises', 'acceptance' and 'reliance' in the figure). The CEO's and VC's views and behaviours influence the planning and implementation of TSO activities, and thus the 'TSO' can be assumed to reflect their perceptions (indicated in rectangles). All the

elements shown in rectangles (the external social environment, TSO history, mission and objectives, resources required and TSO core activities) are from the organisation 'strategy'. The figure is a graphic illustration of the relationships among these four areas, and the complexity TSOs face. The VPC making and fulfilment is realised through 'promise', 'acceptance', and 'reliance', as indicated. They represent the development and management of a VOR. The bold black frame extended from 'acceptance' present a volunteer's decision making process in entering a VOR. It is assumed that successful VPC fulfilment might lead to high level of volunteer commitment (as shown).

This framework has been developed to fit the specific characteristics of the TSO volunteer workforce. It shows how the external environment and the TSO can have an impact on the making of the VPC; and how the outcome of the VPC making and fulfilment can affect the level of volunteer commitment, hence the TSO performance.

## 2.7 Position of the study and it aims

### 2.7.1 Research objectives and aims

At this point, the studied context, the concept and the applied theoretical perspectives are critically reviewed. Based on the exploration above, the key research topic of this study is VM planning and implementation, and their impact on attracting, engaging and retaining volunteers. Within Scottish TSOs, relevant issues will be looked at from strategic HRM perspectives — particularly Resource based view (RBV) in HRM — through describing the process of making and fulfilling the VPC. The study aims to identify factors which may attract, engage and retain a volunteer workforce through strategic VM planning and implementation. The data should show TSO leaders and managers the strategic importance of their volunteer workforce in respect to sustained TSO performance.

### 2.7.2 Research questions

According to the research objectives and aim, the overarching research question is the following:

"In what ways do the processes of making and fulfilling the volunteer psychological contract (VPC) contribute to effective outcomes of strategic volunteer management (VM) practices?"

The following detailed questions help to answer the overall research question.

1. How do TSOs make their 'promises' to attract volunteers? How does CEO perception influence VM planning? What other factors influence VM planning?
2. How do volunteers 'accept' TSO 'promises'? What are the factors influencing their decisions on 'acceptance'?
3. How are volunteer psychological contracts fulfilled?
4. What role do volunteer coordinators (VCs) play? How can VCs ensure satisfactory VM outcomes through effective VM implementation?
5. How do the findings further our understanding of Psychological Contract Theory's contribution to HRM theory development?
6. How could the findings be applied within TSOs to attract and retain volunteers to achieve long term benefits for the organisation?

## 2.8 Chapter Conclusion

The review of the three perspectives suggested that strategically managing the volunteer workforce can also contribute to TSO performance in a long run, echoing the debate about the link between HRM and organisational performance. Overarched by SHRM claims (particularly on linking HRM to organisational performance), this chapter began with an overview of HRM/SHRM, moving to looking at their impact on TSO performance; this thus led to the claim that the volunteer workforce should also be managed strategically. The claim emphasised the importance of connecting strategic management to the management of the VOR. A review of the RBV perspective in HRM showed that the theoretical perspective was suitable as it illustrated the key contributor to TSO performance (human resource, the volunteer workforce in this case). Acknowledging the importance of volunteers indicated the value of a good VOR, as it supposedly contributed to engaging and retaining a TSO's

volunteers. The Psychological Contract Theory allowed an exploration of how the VOR was developed and maintained through the making and fulfilment of the VPC, and how it affected the TSO performance. As a contract maker representing a TSO, a VC's (as volunteer line manager) perception of volunteer contribution and the need for the VM implementation was claimed to have direct impact on the outcome of the VPC making and fulfilment through actually implementing VM practices.

At this point, both context and theoretical concepts have been reviewed and discussed; and the conceptual framework, research aims and objectives as well as questions have been provided to set the research scene. The thesis, therefore, moves on to the methodological part: the design of the empirical study and data analysis. The next chapter reviews the research design and describes the empirical study stages.

# CHAPTER THREE: Research design and Data analysis approaches

## 3.1 Overview

As stated in section 2.7 in Chapter Two, this study intends to answer the overarching research question - *In what ways does the process of making and fulfilling volunteer psychological contract contribute to effective outcomes of strategic volunteer management (VM) practices*? This chapter provides considerations of research design, research methodology, empirical data collection and analytical design. The study adopted an Interpretivist approach to highlight the importance of conducting human inquiries on social contexts, in this case, VM contexts within TSOs. This approach took the view that human interpretations of social context contribute to social world constructions. This is argued to be fundamentally different from a positivist approach, which holds that the social world can be studied in the same manner of studying the scientific world (Blaikie 2010; Crotty 1998). An abductive research strategy was developed, informed by the topic and the philosophical stance.

Insights into the study topic were achieved through first collecting an initial set of data to describe the social phenomenon before further collecting data to answer research questions. The data gathered were analysed inductively to gain further understanding of the organisation studied and of commonly adopted VM policies and practices. This initial study had two results: 1) it helped test an initial theoretical application, and to generate themes reflecting review of the literature and empirical evidence; and 2) it helped recruit and select participating TSOs for the main study stage. A semi-structured qualitative interview was the main data collection method used in both the initial study and the subsequent main study stages. That method was adopted to collect individual narrations of subjects' personal experience related to volunteering and/or VM. Collected narratives were analysed from different individual perspectives – volunteer, volunteer coordinator and CEO. Together, these perspectives gave an image of the process of VM planning and implementation. The data analysis approach is considered as data triangulation (Stake 2003).  The approach focussed on the narrative aspect in interviews (Czarniawska-Joerges 2004;

A. W. Frank 2010; Riessman 1993). Table 5.0 below provides an overview of the research design for the study.

Table 3.1 an illustration of the research design for the study

| Research paradigm | Interpretivism (Crotty 1998) |
|---|---|
| Research strategy | Abductive (Blaikie 2010) |
| Ontology | Idealist |
| Epistemology | Constructionism |
| Research methodology | Multiple case studies (Yin 2003) |
| Empirical study | Phase 1. An initial study<br>Phase 2. Multiple case studies |
| Data collection methods applied | Phase 1. Online survey; Semi-structured qualitative interviews<br>Phase 2. Active interviews (Czarniawska-Joerges 2004; Holstein and Gubrium 1997; Mishler 1986)(Czarniawska-Joerges 2004; Wengraf 2001); Document study |
| Data analysis approach | 'Triangulation' (Flick 1998; Silverman 1993; Stake 2003)) to unfold the process of VM planning and implementation. Multiple coding including descriptive and interpretative coding (Miles and Huberman 1994) |

The later part of this chapter provides descriptions of the empirical data collection, including data collection arrangements, actual data collection and initial results of the data analysis. In addition to the main data collection method used at empirical stages (initial study and main data collection), supplementary methods were also adopted, i.e. an online survey was conducted at the initial study stage, while a documentary study was carried out at main study stage. Collected data were a mix of both empirical and secondary, and a large proportion of the data was qualitative, i.e. interview transcripts and written documents (non-statistical).

The research topic (or a real life issue) is considered to guide what theoretical position to take and what methodology and methods to apply (The argument echoes Crotty's (1998) discussion), particularly in social science research. This view tends to share characteristics of Postmodernism (Crotty 1998; Fontana 2002; Kroeze 2012; Milner 1994; Sarup 1988; Thompson 2002) which argues that a research framework

should be constructed by researchers themselves each time they embark on a new project. Echoing the above claims, the research strategy and the methodology were not selected to follow any approaches adopted by other researchers in the same field. This was partly due to the scarcity of available empirical studies looking at the concept of VM, but was mainly prompted by the actual research topic and all influential factors, theoretical and practical. "As researchers, we have to devise for ourselves a research process that serves our purposes best, one that helps us more than any other to answer our research question" (Crotty 1998, 216).

The chapter ends with reflections on the researcher's role in applying a reflexive approach to analyse and interpret the data. The level of researcher's self-reflection is considered to play a role in data analysis, and hence in study findings. Reflexivity is considered to help to deepen understanding of the studied contexts from multiple angles (Mauthner and Doucet 2003; Walsh and Downe 2006). In this study, it helped to improve the quality of data collection and analysis. Consequently, research questions were answered with in-depth articulation of the results.

## 3.2 The philosophical position– an Interpretivism paradigm

The study aims to interpret/understand the planning and implementation of VM policies and practices by unfolding the process of the volunteer psychological contract (VPC). The study is considered to be under an Interpretivism paradigm, rooted in the philosophical concept of Hermeneutics (Buchanan and Bryman 2009; Crotty 1998).

> "Hermeneutics is one of the two major philosophical-conceptual underpinnings of interpretive approaches to the study of organizations… it is … a theoretical approach and a set of methods for carrying out that approach. With focus on… spoken words, film, and the like, and then built spaces and other non-word-based artefacts…and acts treated as 'text analogues' (Taylor, 1971; see also Ricoeur, 1971), hermeneutics posits a relationship between such artefacts and their 'underlying' meanings. It also encompasses the set of typically unspoken, yet tacitly known 'rules' shared by members of an interpretive-practice community for making sense of those literal or other texts." (Yanow and Ybema 2009, 40)

In philosophical terms, research activity to understand the studied concept and interpret data is considered as a Hermeneutics approach (Crotty 1998; Frank 2010). This approach intends to help people understand studied 'social realities' by understanding human actors' interaction. The core of social science is to study interactions/communications within certain social settings (Crotty 1998). The hermeneutics approach emphasises that a researcher can only conduct research if she/he accepts that social reality is constructed by how human actors interpret the social environment they are in, and how human actors give their account of all events and activities undertaken within that environment (Crotty 1998).

For research on organisations, Interpretivism facilitates researchers to collect "multiple, and potentially conflicting, meanings made or held by different interpretive-discourse-practice communities using and interpreting the same artefacts."(Yanow & Ybema 2009, 40). This does not dispute that social science research should remain objective in data collection in order to provide valid and justifiable empirical evidence. However, data can be considered empirical because of its source, not its nature. Thus, qualitative data, although carrying subjective views of study participants, can still be regarded as empirical if the data are collected directly from researched individuals for the first time.

Interpretivism and Positivism are considered as making different claims about understanding social realities. From the sociological perspective, positivism argues that sociologists do not have control of what happens in the social world, so are likely to observe events, yet be unable to change them (Crotty 1998). However, that argument tends to underestimate how influential human minds can be in shaping outcomes of social events. Conducting human inquiries on research participants' daily events is likely to change how they perceive these daily events, despite the fact that they might have carried out these activities for a long time[14]. When that happens, participants' views on the events have been shaped by the researcher, hence changing events' outcomes (Frank 2010). Positivism does not appear to offer an explanation for such change, as it does not consider the influence from participants/human actors.

Furthermore, Interpretivism is considered to have followed a shift in the organisational research paradigm since 1960s. Such a shift to a large extent responded to changes in theoretical debates, and division between America and Europe within the field of organisation studies (see appendix 1 for a summary of the shifts from 1960s). From an Interpretivist perspective, this study aims to observe the influences of an individual's cognitive behaviour within a social setting (TSO) with focus on the social context of volunteer management (VM). In other words, the study intends to "track the process through which meaning/s is/are created" (Yanow and Ybema 2009, 40). Theoretical explorations (see Chapter Two) have highlighted the importance of VM planning and implementation; this is considered to be reflected in the process of VPC making and fulfilment. Therefore, the above review shows that the contract maker's (individual) perceptions play an influential role on VPC making and fulfilment, and hence on outcomes of VM planning and implementation (refer to section 2.4 in Chapter Two).

Construction of 'social reality' in this context heavily relies on how the individuals involved interpret their own roles in the context, and perceive their own contributions towards the 'social reality'. In other words, how CEOs and VCs perceive the importance of the volunteer contribution to TSO performance, and how volunteers perceive their volunteering experience and the level of support from VCs. From behavioural perspectives, individual perception influences how one interacts with others within different social settings such as family, organisation and public (Fincham, Rhodes, and Fincham 1999). "…constructions of reality are regarded as different (multiple) perspectives on an external world" (Blaikie, 2010, p.94). It is considered that individual perceptions (of volunteers, CEOs and VCs) on volunteerism and the need for VM construct the outcomes of VM planning and implementation. Their perceptions and experiences shape VM activities thus influencing the effectiveness of VM outcomes; therefore, insight into their perceptions would help one understand why effective VM attracts, engages and retains the volunteer workforce.

## 3.3 Research strategy, Ontological and Epistemological assumptions

The strategy of the study is abductive, with an Idealist ontological assumption and a Constructionism epistemological assumption (Blaikie 2010). The strategy "incorporates what the Inductive and Deductive research strategies ignore — the meanings and interpretations, the motives and intentions, that people use in their everyday lives, and which direct their behaviour – and elevates them to the central place in social theory and research" (Blaikie 2010, 89). In this study, the strategy helps to understand why volunteers should be managed and supported effectively, and what values volunteers add to strategic planning and execution. The strategy poses a view that "the social world is the work perceived and experienced by its members, from the 'inside'" (Blaikie 2010, 89). As regards this research objective, it is assumed that outcomes of VM planning and implementation activities within the TSO are perceived and experienced by volunteers, CEOs and VCs. These three role players are 'insiders' of the focussed social phenomenon. Theoretical perspectives were applied to understand these activities, and facilitated the generation of meanings, i.e. provide "technical descriptions" of the phenomenon. Both processes together, thus, complete a notion of abduction (Blaikie 2010). It is also held that the strategy shares similar characteristics with the 'theoretical sampling' approach under the grounded theory claim (Glaser and Strauss 1967).

> "Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges." (Glaser and Strauss 1967, 45)

An Idealist ontological assumption acknowledges that "shared interpretations by social actors" reflect the complexity in volunteering motives and expectations. Said interpretations tend to reveal different perspectives of the social realities in which individuals are based (Fincham, Rhodes, and Fincham 1999) as discussed in section 3.2. Therefore, the ontological assumption in the strategy considers that social reality is created under "shared interpretations that social actors produce and reproduce as they go about their everyday lives" (Blaikie 2010, 93). The epistemological

assumption is considered to be under constructionism (Blaikie 2010). Constructionism argues that while "everyday knowledge is the outcome of people having to make sense of their encounters with... other people,…social scientific knowledge is the outcome of social scientists reinterpreting this everyday knowledge into technical language" (Blaikie 2010, 95). As discussed in previous chapters, the VM concept has been studied using HRM theoretical perspectives, hence researchers have reinterpreted the knowledge using "technical language", i.e. HRM language.

The research strategy, together with the ontological and epistemological assumptions, reflects the core of an Interpretivism research paradigm as discussed in section 3.2 of this chapter. According to the review above, a qualitative enquiry is conducted in order to obtain an 'insider's view' of the social reality. The qualitative researcher's role is to study meanings of texts and to systemise or generate different interpretations of data, and help to explain a social phenomenon (Miles and Huberman 1994). The TSO is considered to be the study unit, regarded as a case. This is because the concept of VM is normally developed within an organisation in response to a need for managing the volunteer workforce for organisational operations. Multiple perspectives of 'social actors' in this context only considers the main players within each TSO, and those who have direct involvement in planning and implementing VM policies and practices i.e. CEO, VC and volunteers. Therefore, the empirical study of three TSOs was organised as 'multiple case studies' (Yin 2003). Under such a set-up, semi-structured qualitative interviews were conducted in each with the three role players – CEO, VC and volunteer. Relevant documents were reviewed to obtain insights into the TSOs i.e. annual reports and documents related to VM policies and practices. The next section offers a review of an initial study and its contribution to the main study. That is followed by a detailed account of the empirical study stages (section 3.5) before moving to data collection and analysis (section 3.6). Figure 3.1 below provides an overview of the study timeline indicating how it was organised.

Figure 3.1 Research Timeline
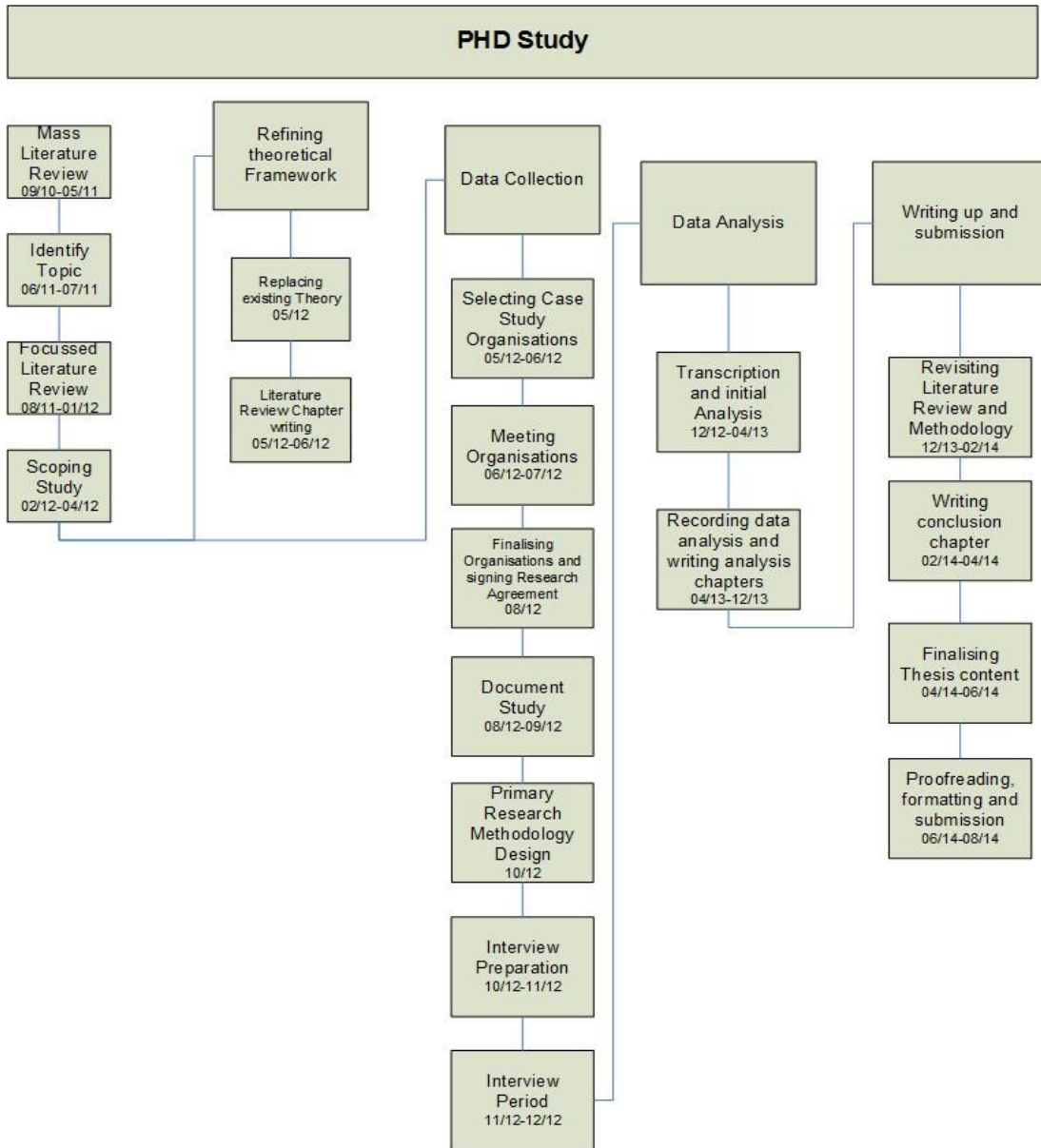
## 3.4 The initial study

In order to ensure that a qualitative enquiry would be conducted to effectively reflect the studied 'social reality', an initial study was carried out. It also helped plan the main study stage in terms of finalising the theories applied, seeking participating TSOs, and shaping research questions. Qualitative interviews and an online survey gathered necessary information to fulfil those objectives. This section starts by providing an overview of the initial study, including the rationale, data collection arrangement and results; followed in the next section by a detailed account of the main study, with detailed review on research methodology, methods and an account of data collection activities.

### 3.4.1 Rationale

The initial study was undertaken to gain insights into current VM development. It was conducted to map "key concepts", especially for the area where limited evidence and literature were available. It was felt that the initial study outcomes would inform the next stage of research in the ways set out below. While this exploratory study was carried out, the researcher was also testing the proposed theoretical framework and seeking participating TSOs.

(a) The initial study would help gather information for a better understanding of the studied area, in this case, an overview of current volunteer management practices in use within TSOs in Scotland.

(b) Furthermore, it would help select a suitable type of studied organisation as regards mission and core activities (among for example, human service, animal service and environment conservation groups plus large nationwide, international trusts and foundations and many more).

(c) Conducting an initial study would help to examine the suitability of the proposed theoretical framework. As discussed in Chapter Two, the majority of theoretical perspectives in HRM and strategic management were based on the private sector; while studies for TSOs or similar organisations (i.e. not-for-profit organisations, charities, voluntary organisations) to a large extent adopted the existing theories to explore people management in the third

sector, but it could not necessarily understand volunteer management by merely adopting HRM theories that focus on paid employee management.

(d) Finally, the initial study would offer practical value in seeking potential TSOs for conducting the case studies.

One major outcome of the literature review and the initial study was that thematic categories were generated as indicated in appendix 3. These informed the next stage of the study from a range of aspects, including the study design and how data should be collected to answer research questions, i.e. the types of documents to be studied; who should be interviewed; how to select interviewees and what interview questions should be prepared. These thematic categories are considered to show how TSOs attract and engage volunteers; and to indicate how CEOs and VCs perceive the importance of the volunteer contribution, hence, the importance of effectively planning and implementing VM. Furthermore, those categories mentioning psychological contracts were summarised from interviewing a local volunteer centre officer, who strongly endorsed a notion that the psychological contract concept would help TSOs to better manage volunteers.

**3.4.2 Data collection arrangement**

The initial study involved a survey and qualitative interviews with one volunteer and three VCs (all from one TSO), and within a local volunteer centre officer (Volunteer Centre Edinburgh – VCE). The survey helped to gather information on current VM development, giving a ground to explore the topic in depth. Additional information (as listed below) was obtained through third sector umbrella organisations and their websites such as OSCR, SCVO and VDS (see Abbreviations). Together with data collected from the online survey and interviews, the initial study focussed on the following aspects.

- Current VM development and ranges of practices applied in the UK and other countries
- Size and types of (majority) TSOs in Scotland
- Proportion of volunteer workforce in TSOs in Scotland

- Views on VM

Data collection was not conducted as a mixed approach as discussed in the methodology literature (Tashakkori and Teddlie 1998). The two methods were applied with different intentions. The survey aimed to gain more knowledge on current VM practices in place and to select potential research organisations. The interviewing stage aimed to explore views of VM and to test the initial theories applied to the study.

### 3.4.3 Overview of Data Collection and Outcomes
### 3.4.3.1 Online Survey
<u>Designing and piloting the questionnaire</u>

The survey is a commonly applied method within social science research, despite general debates on its advantages and disadvantages (Bryman and Bell 2003; Robson 2002). It is considered to suit a wide range of research purposes such as examination/investigation, exploration and evaluation (Blaikie 2010; Robson 2002). A survey questionnaire was considered as necessary supplemental data for the initial study stage, to gather information on current VM practices, general view of VM from organisation's perspective and on the types of volunteering roles. Being part of an initial study intended to map out the study scope for the main stage of data collection, the survey had the potential to also build networks to TSOs, and raise topic awareness among practitioners. An online survey was selected to save time and cost. In addition to the purposes mentioned, there was intention of seeking potential TSOs for case studies from survey respondents. Therefore, the final part of questionnaire was to encourage respondents to consider participating in case studies.

The questionnaire was designed using Bristol Online Survey (BOS), which is a university subscribed online survey design portal. The criteria for the size of the organisation and the types of services provided are based on the classifications of Cunningham (2001, 231), as his study was also an exploratory study focussing on Scottish TSOs. Before the questionnaire was finalised, it went through several rounds of development through piloting with practitioners and academics based in

Edinburgh, including PhD supervisors, PhD colleagues with relevant work experience, and one VC from a TSO contacted through a friend. The questionnaire was also distributed via the Voluntary Sector Studies Network (VSSN) for feedback and comments across wider study communities across the UK; there were nine replies which offered valuable feedback from both practitioners and academics. Piloting the questionnaire provided clarifications over the use of terminology, sentence expression and minimising misunderstanding of questions that could potentially lead to invalid responses. Distribution via the VSSN also helped to ensure URL link accessibility. From commencing questionnaire design to completing questionnaire piloting, it took approx. four months, from November 2011 to February 2012.

Survey distribution

Given the study objectives and aim, it was considered reasonable to approach umbrella organisations in the sector who offer support to TSOs on VM development. Therefore, some research and initial communications were conducted with these organisations from the beginning of 2012. It was intended to search for an appropriate channel for distributing the online questionnaire; the organisations approached included Office of the Scottish Charity Regulator (OSCR), the Scottish Council for Voluntary Organisations (SCVO) and Volunteer Development Scotland (VDS). These were all national organisations; but it was not possible to negotiate cooperation with all of them for various reasons.

Out of these organisations, VDS is a major umbrella organisation which supports both volunteers and volunteer-involved organisations. VDS also conducts regular research to capture the volunteer development in Scotland, and publishes research papers and working papers. Therefore this was considered to be the most ideal, because all of its registered member organisations involve volunteers. Several emails were sent to a contact person but without reply. After the questionnaire was emailed out to VSSN members to pilot, the Research manager at VDS got in touch and expressed interest in helping distribute the questionnaire via their database. Thus this resulted in some correspondence to be followed up.

As part of VDS' role is conducting research to provide information to Scottish TSOs regarding volunteering development, they already have regular surveys in place to collect volunteering related data. Therefore, it was VDS's view that the questionnaire to some extent shared similarities with their own annual survey; so there were negotiations over the possibility of using their existing survey results instead. However, that was unsuccessful for there was long delay in reaching common ground in the matter, and no real progress in how to carry out the survey with VDS. This posed a threat to the overall progress of the PhD. Finally, when the contact person went on maternity leave in May 2012 without handing the matter over to others, the correspondence had to end in order not to cause further delay.

During the negotiation with VDS, there was a networking opportunity at a workshop at VDS in February 2012, when an initial contact was established with the CEO of VCE (Volunteer Centre Edinburgh). The CEO was highly interested in the research topic and expressed the intention of participating. A follow up meeting was organised at VCE's office in Edinburgh, and more information was gathered about volunteering development in Edinburgh. The CEO and the Learning and Practice Officer, indicated that Edinburgh offered diverse volunteering opportunities. In the end, a connection was established with VCE to use its member organisation database. With their support, the questionnaire was finalised and distributed via the VCE member newsletter email. It is considered that studying Edinburgh-based TSOs makes a good contribution to understanding VM impact throughout Scotland, for Edinburgh TSOs offer wider range of volunteering opportunities than other Scottish cities. Being the capital of Scotland, Edinburgh is the location of many TSOs' offices and HQs. Therefore, the results were considered, to a large extent, applicable to most Scottish TSOs.

Outcomes

Any organisation involving volunteering work is eligible to join VCE's network. Over a four-week period, VCE announced the survey call twice to their members to encourage participation and there was a moderate level of responses from

organisations across both public and third sector.  The estimated sample size for the survey was 800 organisations across public, private and third sector. It was mentioned during the meeting that VCE would only help to distribute the link to the survey, but would not heavily promote the participation to avoid 'putting organisations off' by excessive surveys. As VCE organises a regular survey each year, the CEO was anxious to protect the response rate to this, so she expressed reluctance in promoting an external survey. The announcement in the E-newsletter was therefore not made prominent, hence a high level of readership could not be guaranteed. This affected the response rate. In total, there were twenty-nine responses, twenty-five of which were TSOs (see table 3.2 below). Sixteen TSOs were small to medium size organisations, with less than 100 employees and volunteers, as shown in table 3.2 below. This result to some extent also indicated that small to medium TSOs seemed to rely on the volunteer contribution more to sustain their operations, hence the need for having established VM policies and practices in place. This size of TSO is also considered to be in the majority in Scotland, with eighty-four percent of TSO falling in the small to medium size range (Scottish Third Sector Statistics 2012)[15].

Table 3.2 Summary of participating organisations – type and size

| 4. Please indicate the size of your organisation; this is based on the number of people working in the organisation including both paid employees and volunteers. | Public Sector | Private Sector | Third Sector |
|---|---|---|---|
| Less than 20 people | 0 | 0 | 3 |
| 21 - 100 | 2 | 0 | 13 |
| 101 - 200 | 1 | 0 | 2 |
| 201 - 500 | 0 | 0 | 4 |
| 501 - 1,000 | 0 | 0 | 0 |
| 1,001 - 2,000 | 0 | 0 | 1 |
| 2,000 + | 0 | 0 | 2 |
| Other | 1 | 0 | 0 |
| totals | 4 | 0 | 25 |

As the response number was manageable, data were organised and analysed simply using Bristol Online Survey functions i.e. 'Cross Tabulation', plus self-organising

via Excel. These approaches were considered best in closely comparing and interpreting data. Figures presenting survey results were produced through Excel 2010 version. Results showed that the majority of TSOs had more volunteers than paid employees, as indicated in figure 3.2 below.

Figure 3.2 Percentage of volunteer workforce by TSO
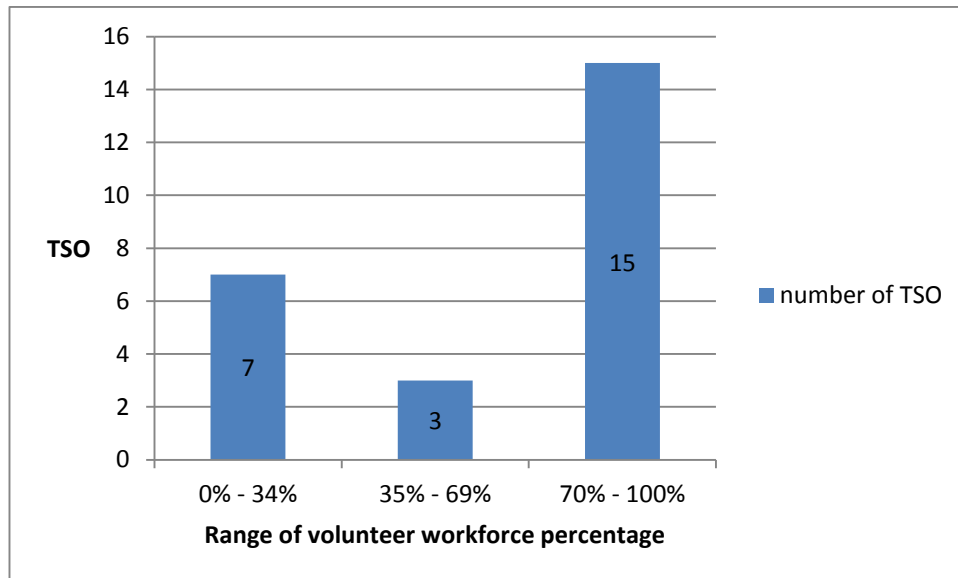


According to the survey results, volunteers were engaged on a wide spectrum of activities (see appendix 13 for full lists of volunteer involved activities). The diversity in activities indicated that the volunteer workforce was essential to TSOs (see section 1.3.1 in Chapter One). Sixty-nine per cent of respondents did not require their volunteers to work for a minimum period. For those with a minimum period, 44.4% requested a volunteering period between 6 and 12 months; the completion rate ranged between 50% and 100% (see responses to related questions in figure 3.3 below). Over ninety percent of respondents used a standard application form and references to recruitment volunteers, and about half of them used formal interviews. There were also other recruitment processes, aligned to the nature of the volunteering activities, e.g. "Talk (persuade) volunteers (to) have an interview with our specialist nurses to check they are ready and suitable to take on that role"; "Information and guidance day Opportunity to meet tutors and volunteers working in the provision".

Figure 3.3 Responses to volunteering period

| 10. Do you require your volunteers to work for a minimum period of time? | | |
|---|---|---|
| **Yes:** | 31.00% | 9 |
| **No:** | 69.00% | 20 |
| 10. a. What is the minimum period? | | |
| **Up to 3 months:** | 22.20% | 2 |
| **3 - 6 months:** | 0.00% | 0 |
| **6 - 12 months:** | 44.40% | 4 |
| **more than 12 months:** | 11.10% | 1 |
| **Other *(please specify)*:** | 22.20% | 2 |
| 2 sessions a month<br><br>Computer training tutors min period = 12 weeks, project volunteers in care homes min period = 1 year | | |
| 10. b. Please indicate the percentage of the volunteers who have completed the required minimum work period in your organisation. | | |
| **Up to 25%:** | 0.00% | 0 |
| **25 - 50%:** | 0.00% | 0 |
| **50 - 75%:** | 55.60% | 5 |
| **75 - 100%:** | 44.40% | 4 |

In order to attract more people to volunteer, TSOs use different ways of communicating. Survey results showed that volunteering information commonly reaches individuals via volunteering recruitment announcements, and the TSO's publicly accessible documents such as annual reports and publications/publicity about volunteering activities. The TSOs who responded use different information to promote the benefits of volunteering and the social value volunteers create. Ninety-five per cent of respondents reported that their organisations provided induction sessions and training (unknown numbers of training sessions). However, the result might be questionable as the responses did not provide in-depth information on how these processes were established - whether the respondents merely adopted these HR processes (e.g. Taylor and McGraw 2006) or really developed the materials, aiming to support the strategy implementation. Sixty-six per cent of respondents stated the organisations have regular performance review with volunteers; and seventy-two

percent of respondents kept a record of the work carried out by volunteers and provided some form of recognition of the volunteer contribution. Again, survey results could only indicate that the respondents have formal VM processes in place; the responses did not provide information on how effective the respondents perceive these processes to be.

Regarding the respondents' views of volunteerism and the role of VM, the responses varied to some extent. In general, about thirty percent of respondents claimed that volunteers are important assets to the organisation, and the role of volunteer coordinator is necessary to engage volunteers to the organisation. In addition, about fifty-five percent of respondents acknowledged that managing volunteer performance is different from managing employee performance. About forty-eight percent of respondents also claimed that using volunteers helped save cost. Overall, fourteen respondents felt it is easy to recruit volunteers, and seven thought it is not.

These survey results provided a partial view of what practices TSOs have adopted to manage volunteers. But the results merely revealed the processes adopted, not the reasons for using these practices. It was found that most participating TSOs have very similar practices in place (e.g. ninety-five percent of respondents use the same formal approaches in volunteer recruitment and selection); but there could be differences in implementation, e.g. how each organisation conducted the induction session. Overall, the survey results implied that further investigation is required, especially in-depth exploration of the respondents' VM practices application. However, the survey findings did offer empirical evidence that the TSOs to be studied should be of small to medium size, representative of most Scottish TSOs as discussed in chapter 1; in addition, organisations of such size also heavily relied on volunteer contribution as discussed in the same chapter.

There were some variations in the perceptions of the value of the VM currently in place. However, this may not be significant because the response rate was low, probably due to two practical factors. Firstly, the survey was announced only twice via member e-newsletter; therefore, it was likely that the announcement was

overlooked by members. Secondly, the Centre was reluctant to strongly encourage members to participate as this might affect the response rate towards their own annual survey, although they did offer a little incentive for survey participation.

The survey results revealed a need for exploring different individuals' influence on effectively planning and implementing VM; having similar VM practices in place does not necessarily have the same implementation outcome (matching the review in section 2.3). Therefore, it was considered that actual outcome is influenced by how VM policies and practices are planned and implemented; hence, a necessity to understand how CEOs and VCs perceive the value of VM. While it is true that these survey results merely captured artefacts in VM, they at least imply that the volunteer workforce is important to TSOs. This implication further supports the claim regarding the importance of effective VM to attract, engage and retain volunteer.

### 3.4.3.2 Semi-structured qualitative interviews

<u>Interview organisation</u>

One main reason to conduct interviews was to evaluate the initial theoretical framework: using contingency theory to explore the strategic VM planning and implementation and how this could help sustain volunteers; and using the Psychological Contract Theory to explore how sustaining volunteers impacts organisational development. A total of five interviews were conducted including one volunteer, three VCs and the Learning and Practice Officer at VCE. The volunteer and three VCs were from one small TSO delivering services to, disadvantaged, vulnerable and isolated families, those with children with disabilities and young people with disabilities.

The design of the interview questions was governed by the framework and survey findings; during the interviews, it was realised that there were areas which could not be explored in depth just by using the initial theoretical framework. A contingency approach was preliminarily applied, because this approach promotes an idea of 'fit', in other words, strategies are developed to fit into a developed organisational environment (Donaldson 2001). But previous studies found that in many respects

TSOs have unbalanced development as regards forming strategy compared to private firms (refer to Chapter One). First, most TSOs are not formed structurally and systematically. Moreover, there are few regulations requiring TSOs to have certain formalised structures and policies. In addition, many (small to medium) TSOs do not have the stable financial resources to establish and maintain formal structures. Also, many TSO managers are not from a management background, for they are more driven by shared social values. Consequently, the majority of TSOs do not have the organisational structure required by the contingency approach.

Outcomes

The interview with the Officer from VCE was of great value towards understanding VM development in Scottish TSOs, and it was informative as to how the theoretical framework could be applied to data collection in terms of types of data, sources of data and approaches of data collection. Themes were generated based both on analysing the initial study data and on the literature review (see appendix 3). These themes helped to shape the conceptual framework displayed in Chapter Two (see figure 2.4). They indicated what TSOs need to consider before recruiting volunteers. The themes support previous academic research findings on volunteerism and VM as discussed in section 1.3 in Chapter One (e.g. Pearce 1993; Vinton, 2012; Warner et al., 2011; Kim et al., 2010; Bowman, 2009; Hustinx and Handy, 2009; Taylor et al., 2006; Leonard et al., 2004; Baines, 2004; Farmer and Fedor, 1999; ). Key terms that emerged from the interviews with the VCE Learning and Practice Officer were 'complex', 'TSO managers lack *true* understanding of volunteer's contribution', and 'volunteer's motivation' (see an interview summary in appendix 15). These aspects were reflected in analysing the main study findings implicitly and explicitly.

Two of the three VCs were responsible for both paid and volunteer 'sitters' (who provide support to parents with children with disabilities, lone parents, and families in need in their own home on a regular basis); the third one was 'befriending volunteer' coordinator. All of them had more than 10 years' varied work experience. One of the sitter coordinators has always worked as a VC; the distinctive themes that emerged from her interview included 'professional volunteer management' and

'separate volunteer coordinator role'. The other sitter coordinator had professional experience of childcare and managing a childcare centre; key themes from her interview included 'client's needs as priority', 'informal communication with volunteers', 'difficult to recruit sitter volunteers' and 'different approach from managing paid employees'. The befriender coordinator undertook the role after his retirement from previous work and has been working with befrienders in the same TSO since; and the key themes included 'importance of the matchmaking process' and 'stronger affiliation with the coordinator instead of the organisation'. It appears that differences in their professional background led to variation in perceptions, as well as to individual styles of being coordinators. Consequently, their perceptions had impact on how they worked with their volunteers.

There is some confirmation of the assumption that TSOs adopt processes instrumentally. When asked what information was included in the volunteering agreement, the coordinators were unable to provide clear explanations; one admitted that she has never read what is on the agreement. The CEO believed it important to have an established HR system, hence has adopted some 'good' templates from other TSOs. When the befriender coordinator was asked about this same issue, the response was "I had to produce a lot of paperwork as required by the new CEO". In terms of how supportive the executive is, one VC expressed a concern at the high rate of CEO turnover: "I have worked with many CEOs in this organisation, each of them had their own working style…" (Sitter Coordinator 1).

The recurrent words from the volunteer were "obligation", "beneficial" and "personal development". Although these words might not be representative of volunteers' perceptions, they appear to support a claim regarding motives for individuals to volunteer and what they expect from the TSO (e.g. Clary et al. 1998).

The motive for the participant to volunteer at the very beginning was to 'do something to fill time' and 'wanted to something rewarding'; these then seemed to have turned into something she found 'beneficial' towards her 'personal development'. Since she started volunteering as a befriender, she also engaged with

another volunteering role at one local community centre, helping out in children activity groups. Overall, she was very happy with the experience and felt the coordinator was supportive. She mentioned that she was moving to another volunteering role (her befriending service just ended the week before the interview). The change of her motives from beginning to the end of her first volunteering role supports the argument that 'volunteers are more likely to want to continue to volunteer if the experience has been a satisfying one (Green & Chalip, 2004)' (Warner, Newland, and Green 2011, 393).

### 3.4.3.3 Contributions of the initial study

Substantively, the initial study indicated that VM practices commonly have been established within many TSOs. These practices to some extent resemble HR practices in private firms. Meanwhile, the results also suggested that existing HR practices cannot merely map out the VM if the practices do not match the real needs of the TSO. TSO executives need to clarify why volunteers are used and how volunteers could help achieve organisational strategies before developing volunteering roles and VM practices. This argument was also reflected in the initial meeting with the VCE's director, who expressed a concern that many TSO executives are merely adopting standard 'good processes', believing it would make a difference.

Outcomes of the initial study contributed to assessing and refining theoretical considerations. However, they also indicated that an RBV perspective was more suitable to help to understand the context of strategic VM in TSOs. This was considered to be an important outcome of the initial study. Interview questions were adjusted accordingly after reviewing the interview transcripts of the befriending coordinator, and the interviews that followed with the two sitter coordinators used newly developed questions. Data collected with the revised interviews were considered more suitable to answer research questions. As a result, the Resource Based View (RBV) perspectives in HRM were applied to the main study. During the initial study, it was further found that Psychological Contract Theory was applied

more appropriately by embedding the process of VPC making and fulfilment into VM planning and implementation, hence the final conceptual framework (figure 2.4).

Methodologically, a series of relevant themes and categories were generated from the initial study outcomes, and they governed a) how the main stage study could collect data to better answer research questions, b) who should be study participants, and c) what data collection methods would be appropriate. The initial study also helped to identify potential case study organisations.

### 3.4.4 Section summary

This section provided a detailed review of planning the initial study, data collecting, the analysis approach, the study's outcomes and their contribution towards the main stage study. The initial study pointed out key areas for further exploration to achieve research objectives. It helped map out the research ground, suggesting ways of how the main study could be organised and how data could be encapsulated to lead to valid analytical outputs. The initial study also provided empirical evidence indicating that volunteers were a key workforce, particularly in small and medium TSOs. This finding was used to select the case organisations in the next data collection stage and helped to set criteria for potential eligible TSOs.

## 3.5 Main Study stage: research methodology and methods

After the initial study ended in May 2012, the following five months were spent in analysing initial study data (as discussed in the previous section); selecting case study TSOs; designing data collection strategy; further improving the literature review; and writing the draft literature review chapter. Before describing the empirical data collection process, this section begins by discussing the main methodology and main data collection method, i.e. collective case studies and qualitative interviews.

### 3.5.1 The methodology – multiple case studies

Case studies were carried out to collect data to answer research questions. However, the term 'case study' is not a methodological term, but merely an indication of the

data collection scope. "Case study is not a methodological choice but a choice of what is to be studied" (Stake 2003, 134). This interpretation suggests that various methodologies could be applied within a case study context, with either a single case or multiple cases. Case study has long been discussed as a research strategy, and has also been widely adopted within the social science research domain (Yin 2003; Yin 1994). Researchers conduct case studies with different interests, both 'intrinsic' and 'instrumental' (Stake 2003). Based on the interpretation by Stake (2003), the 'case study' interest in this research is instrumental.

> "…a particular case is examined mainly to provide insight into an issue or to redraw a generalization. The case is of secondary interest, it plays a supportive role, and it facilitates our understanding of something else. The case still is looked at in depth, its contexts scrutinized, its ordinary activities detailed, but all because this helps the researcher to pursue the external interest." (Stake 2003, p.137)

Others have applied case study design to study the VM concept with a different focus. Some of the previous studies using the approach tend to bear 'intrinsic' interest (Katou and Budhwar 2012; Nickson et al. 2008; Waikayi et al. 2012). Others could be considered to apply 'case study' with an 'instrumental' interest, although these studies do not usually position their data collection as 'case study', since the researchers placed more emphasis on the actual methodologies applied. The type of 'case' also varies, ranging from organisations to individuals (e.g. Jaeger, Kreutzer, and Beyes 2009; Stirling, Kilpatrick, and Orpin 2011; Warner, Newland, and Green 2011).

Multiple cases are conducted, because "the evidence from multiple cases is often considered more compelling (Herriott & Firestone, 1983)" (Yin 2003, 46). In this study, each of the three selected organisations was considered to be a 'case' in which the researcher collected data through qualitative interviews and document study. It was thought necessary to learn about the organisation, including its development, profile, size and structure; but the purpose was to serve the research objectives in exploring how VM is planned and implemented and the impact on making and fulfilling VPC. Thus, a primary research goal is to understand the context of VM, not

the phenomenon of VM under the influence of any particular organisation. The choice was also made because there is little empirical evidence available to form general understandings as regards VM planning and implementation from the perspectives of volunteer-organisation relationship. Thus, the study would have less value and limited application if the focus were set on any particular organisational type.

### 3.5.2 Data collection methods

Individual narratives of relevant experience in volunteering and in managing volunteers/TSOs were considered to be crucial qualitative data, collected through qualitative interviews (empirical data). Additional qualitative data were also collected through documentary study (secondary data) to gain insights into the TSOs in the study. Secondary data were also considered to provide additional evidence on how CEO and VC perceptions influence the development of VM structure.

### Qualitative interviews: constructing meaning through active enquiry

Interview data to some extent are narratives about self/the interviewees, i.e. CEO, VC and volunteer (Gergen and Gergen 1988; Kerby 1991). The approach elicited narratives to help understand how volunteer psychological contracts were made and fulfilled, hence understanding the process of VM. Self-narratives of CEOs and VCs gave insights into the perceived outcomes of actual VM from the TSO perspective. Furthermore, VCs' narratives also tended to indicate how they implemented VM (influenced by various factors including their own experience and perceptions of volunteerism & VM), as well as how they positioned themselves in VOR. All narratives are thought to reflect a self-defined role and identity in the volunteering and VM context, which thus influence individual expectations on undertaking their work as CEO, VC or volunteer.

The interview is widely used in social science research (Holstein and Gubrium, 1997, 2001; Baker, 1997; Silverman, 1993 cited in Czarniawska-Joerges, 2004; Mishler, 1986). The interviewing method is a well-recognised qualitative data collection technique (Mishler 1986). The development of social science research over decades

have resulted in 'the democratization of opinion' (Gubrium and Holstein 2002). With the increased study of human behaviour in many different fields, the interviewing method has been developed and applied differently across different subject areas; consequently, there have been different discourses on how to conduct research interviews and the differentiation of types of research interviews.

> "…the interview, as a procedure of securing knowledge, is relatively new historically. … individuals have not always been viewed as important sources of knowledge about their own experience." (Gubrium and Holstein 2002, p.4)

Review of the method has gone beyond merely distinguishing unstructured, semi-structured and structured interviews (Bryman and Bell 2003). Using interviews to study individual perceptions of certain concepts is considered suitable because:

> "Interviewing gives us access to the observations of others….Interviewing can inform us about the nature of social life. We can learn about the work of occupations and how people fashion careers, about cultures and the values they sponsor…we can learn also, through interviewing, about people's interior experiences. We can learn what people perceived and how they interpreted their perceptions…(Weiss, 1994, p1)" (Gubrium and Holstein 2002, 8)

The interview approach is applied to seek interviewees' views and attitudes towards a particular concept. The purpose of a semi-structured interview is to minimise the number of 'standard' answers interviewees give, which may not truly represent their view, whilst still enabling the researcher to ensure that the interviewee's responses are relevant to answer the research questions. Although there are clear research objectives and questions, it is still considered important to allow interviewees to respond to the questions flexibly following a loosely defined topic. In keeping with the research aim, narratives can supply crucial data about the interviewees' life experiences, which offer important evidence to the researcher to understand why interviewees are involved in different activities, in this study volunteering and managing volunteers. This highlights the fact that the focus is not on the interview as a technique, but on the interview interactions themselves.

> "It is important to understand that interviews do not stand for anything else; they represent nothing else but themselves. An interview is an interaction that becomes recorded, or inscribed, and this is what it stands for." (Czarniawska-Joerges, 2004, p.49)

Furthermore, meaningful data are likely to be obtained through interview if the researcher is 'active' in interviews with interviewees (Frank, 2010; Mishler, 1986; Wengraf, 2001; Holsetin and Gubrium, 1997). By actively participating, the researcher is able to draw out relevant information driving interviewees' narratives. Thus, semi-structured interviews with open-ended questions give the subjects an opportunity to expand some interesting information. This would not be achieved if the researcher were passively involved by merely asking prepared interview questions and recording answers. From the perspective of a narrative approach, the researcher is considered to hold the main responsibility to "activate narrative production" (Holstein and Gubrium, 1997, p.123). Therefore, s/he is probably only able to fulfil this responsibility by being involved in the meaning-making process. In this study, interviews are used as 'narrative production sites' (Czarniawska-Joerges 2004, 49).

The interviews conducted are regarded as 'active interviews', in terms of considering the researcher's role (Holstein and Gubrium, 1997). It is of course recognised as that "meaning construction is unavoidably collaborative" (Garfinkel, 1967; Sacks et al., 1974), it is virtually impossible to free any interaction from factors that could be construed as contaminants. All participants in an interview are inevitably implicated in making meaning" (Holstein and Gubrium 1997, p.126).

Like many other research methods, the interview has also received criticisms as to data objectivity and validity (e.g. Gorden, 1987, cited in Holstein and Gubrium, 1997). But the criticism is often based on how interviews were conducted, often governed by interview guidelines (Miller and Glassner, 1997; Holstein and Gubrium, 1997; Czarniawska-Joerges, 2004; Wengraf, 2001). The dispute over the reliability is further thought to have risen from positivism perspectives (Miller and Glassner 1997). Guided by research aims & objectives, the research questions (see section 2.7), the stated philosophical position (see section 3.2) and the research design (see section

3.3), an interview method is considered suitable for this study if interviews are conducted to reflect the aspects mentioned in this section.

**Using qualitative interviews to study the psychological contract**

Most previous studies on the psychological contract focussed on a paid employee context, using survey questionnaires either as the main data collection method or as part of a mixed method (e.g. Bal et al., 2013; De Vos et al., 2003; Robinson et al., 1994; Sels et al., 2004). "…the field is dominated by one sort of study – the cross-sectional questionnaire survey. The dominance of this method has led some researchers to observe that psychological contract research has fallen into a 'methodological rut' (Taylor and Tekleab 2002: 279)" (Conway and Briner, 2005, p. 89).

> "Using in-depth interviews produces data of idiosyncratic experiences and interpretation of the psychological contract, grounded in the language of employees and organizational context. Such accounts are consistent with the psychological contract as a highly individualized subjective construct (Rousseau and Tijoriwala 1998), and are vital for elaborating our understanding of how employees understand and describe key aspects of the psychological contract" (Conway and Briner, 2005, p.97)

This study aim is to unfold the process of making and fulfilling VPC, to understand how individual perceptions influence the effectiveness of actual VM. The research objectives were based on HRM perspectives; the Psychological Contract Theory served the purpose of understanding how individuals made volunteering decisions with the TSO, through undergoing the process of accepting and fulfilling the volunteer psychological contract. Thus, individual experience (narratives of their lives and their experience of joining and volunteering) tended to develop volunteering expectations and motives, and hence to form perceptions on how the TSO helped individuals achieve their expectations. Therefore, the qualitative in-depth interview method allowed the researcher to obtain relevant data. Furthermore, 'individual perception' on reaching reciprocal understanding was stressed and acknowledged to be the key concept of the psychological contract (Rousseau, 1998). The emphasis on 'individual' suggested that there was unlikely to be a universal set of perceptions of volunteerism and VM among volunteers; therefore, a qualitative

interviewing method was likely to collect more suitable data to explore the topic than a rigidly structured survey.

**Document study – supplementary data collection method**
The study of documents provides supplementary data, particularly in case studies (Bryman and Bell 2003; Robson 2002). The data obtained this way are of a qualitative nature, since the researcher is involved in interpreting the texts with respect to the research topic (Bryman and Bell, 2003). Document study is used in this study to immerse the researcher in the researched TSO environment. That is to say the data from document study helps the researcher to gain better insights into the organisation's profile, its nature, its developmental background, current demands, and the challenges faced by the TSO. Understanding these aspects helps make sense of the decisions made about involving volunteers, VM planning and implementation, and the influence of management approaches to the volunteer workforce. "…in case-study research, documents can be used to build up a description of the organization and its history" (Bryman and Bell, 2003, p.413).

In the light of that, the following considerations were given when deciding what types of documents to study and to what extent:

> (a) The document could provide overview of the organisational development,
> (b) The document was related to VM policies and practices, and
> (c) The document would help explore the research topic.

The document study was conducted before the semi-structured interviews as the insights it offered helped design questions that could better inform the overall research findings. Not all organisational documents were studied; selected documents meeting the above three criteria included annual reports from 2000 to recent, all VM-related documentation (which varied from one organisation to the other), and their current volunteers' profile. The document study was conducted from August to October 2012 soon after research agreements were signed.

### 3.5.3 The selection of the research organisations

Of the eight respondents who were interested in case study participation, five were TSOs: one large TSO providing advice to Edinburgh residents over wide range of issues, and four small to medium organisations. These included a community centre, and an organisation supporting university student's skill development. The other two TSOs provide services to targeted groups – elderly people and physically disabled people. As indicated by initial study outcomes, four TSOs were considered to fit the criteria in organisational size. Therefore, initial emails were sent out to these four TSOs in early April 2012 to arrange meetings with the contact persons to explore the possibility of participation. All of them responded and meetings took place between late April and early June.

This sub section gives an account of the case study participant selection process, focussing on the level of volunteer involvement, VM policies & practices, reasons for selection and potential impact on the study. Three out of four TSOs were selected; the names used below are not their real names but reflect their organisational mission and objectives. A profile of the unselected TSO is provided in appendix 16.

The selection outcome

The student-run organisation had quite different governance and objectives from the other three. The concern was that data collected from it might not be generalizable to the majority of Scottish TSOs. The argument here was that such an establishment was very little subject to the social and economic environment, and less to the State; it also had few regional characteristics, i.e. student organisations in England, Wales or Northern Ireland would have similar structures, so long as their mission was to help university students meet their soft skills development needs. The other major difference was that the student-run organisation recruited student volunteers for self-development purposes, by helping other charities. Its loose governance structure was also regarded unfit for the research topic as there was an obscure distinction between the VC and volunteers. It is, however, worth mentioning that the student volunteer is a special and interesting group; there should be a separate study exploring such

phenomenon and its impact upon employability enhancement and the graduate labour market development.

The other three organisations were common in the sector in Scotland, and two were influenced by the social economic development in the country (see their profiles in Chapter Four). They all involved volunteers in major roles of helping with service delivery and ensuring smooth project implementation. Upon considering the organisations' profile and their reasons for involving volunteers, the elder people organisation, the community centre and the physically disabled people organisation were considered suitable to be case study participants, while the student organisation was turned down. At the end of June 2012, all organisations were informed of the final decision. Research agreements were signed with the participating organisations in August 2012. In this study they are identified as "Age IT", "EL Centre" and "EC Support" (not the registered organisation names).

### 3.5.4 Ethical considerations

On seeking permission from participating organisations, a research agreement was prepared for each, as well as the individual volunteer invitation to interview with a consent form attached. The content of the agreement was adapted from the University of Edinburgh research agreement template, in line with checking the ethical code of conduct provided by College of Humanity and Social Science (CHSS). The individual invitation to interview and the consent form were adapted from the study of "Encouraging labour market activity among 50-64 year olds" (Loretto and Parkin, 2010). The research involved direct engagement with participants through interview, therefore a level 2 Research Ethics Application was approved and signed by the PhD supervisor.

### 3.5.5 Arranging the data collection

The majority of the data from this stage comes from semi-structured interviews with CEOs, VCs and volunteers across all three organisations. Out of the three roles, there was little difficulty to decide how many CEOs and VCs to select as it was clear that all CEOs and VCs would be interviewed. Due to the diversity of volunteers,

considerations were given to the number, and the ideal types of volunteers to be interviewed in each organisation so that their demographic profiles – age group, gender, occupational background, and length of volunteering (see table 3.3 below) - would be characteristic of volunteers in Scotland. It was understood that there would be discrepancies between a theoretically 'ideal' and the actual demographic of interviewed volunteers, because participating in an interview was voluntary. The volunteer participant's profiles are provided in appendix 9.

Interview questions were designed to fit the three types of roles (see appendix 4, 5 and 6), with some modification during the actual interview to reflect organisational characteristics and areas that needed more clarification after the document study. By default, CEOs and VCs agreed to participate in interviews upon signing the Research Agreements; thus, the remaining procedure for them was merely to arrange times and dates for the interviews. Seeking volunteers to do interviews was a different matter. A letter inviting them to participate was drafted, with approval of the letter format and content being obtained from each organisation before it was distributed to volunteers. In addition to the letter, a consent form was enclosed to ensure full compliance with research ethical codes and data protection policies (see appendices for interview questions and consent form templates).

Table 3.3 Diversity of volunteer demographic profile

| | | Number of volunteers |
|---|---|---|
| Volunteering length | New ≤ 1 year | 3 |
| | Experienced ≥ 1 year | 13 |
| | | Total n = 16 |
| Transferred identity | Ex-client / service recipient | 1 |
| Age group | ≤ 25 | 2 |
| | 26 – 35 | 3 |
| | 36 – 45 | 1 |
| | 46 – 55 | 3 |
| | 56 – 65 | 5 |
| | ≥ 66 | 1 |
| | | Total n = 16 |
| Current occupation | University student | 2 |
| | In employment | 2 |
| | Unemployed | 4 |
| | Retired incl. Early retirement | 8 |
| | | Total n = 16 |
| Background | Professional | 10 (incl. non-managerial and managerial professionals) |
| | educational | PhD level n = 2 University level n = 10 College or less n = 4 |
| Types of volunteering role | EC Support: | Befriender (project worker) |
| | EL Centre: | Café Assistant; Shop Assistant; Building maintenance; Lunch helper (project worker) |
| | Age IT: | IT Class Assistant; Project worker |

EL Centre and EC Support both agreed to facilitate the interview on their premises, but Age IT was not able to provide an interview venue due to their restricted office space and high volume of usage; thus, all interviews with Age IT volunteers were conducted at the Business School. The three organisations had few concerns over the letter content. The CEO of Age IT requested that the invitation letter should stress that volunteers would benefit the organisation by being interviewed, and the content was modified accordingly.

The interviewing period was from late October to mid-December 2012; all interviews were audio recorded and the consent forms were signed at the beginning of each interview. In addition to audio recording, narrative grids were created for CEO, VC and volunteers respectively. The grids were designed to record information about individual personal profiles. To better understand how individual perception was formed, all interviewee profiles are shown in appendix 9 and 10. The grids for CEO and VC are very similar, but there is more information listed in the volunteer narrative grid. Information collected through the narrative grid was written into a short narration by organising it in chronological order, to identify the person's connection to their current roles i.e. CEO, VC or volunteer. All grids have the category for 'other significant life events which led to taking the role'; this category proved valuable during interviewing as at least one third of participants' decisions to undertake their current role was revealed by it. Although the majority of that third were volunteers, one was a CEO who actually started to work in the third sector due to an unexpected change in family status.

As discussed earlier in the chapter, data collection at this stage was through document study (n= 43) and semi-structured interviews with CEOs (n=3), VCs (n=5) and volunteers (n=16). This section considers each data collection method in terms of why it was used, what output was expected as regards answering research questions, and how it was conducted.

Briefly speaking, the document study was the first phase of data collection, to gain in-depth understanding of each organisation's profile, i.e. its mission and objectives, its development and its VM policies. Document study findings were applied to designing interview questions to capture how each individual perceived VM, hence, how such perceptions influenced the outcomes of the actual VM.

Annual report

An annual report is commonly adopted by organisation regardless of the sector to which it belongs. As a legal requirement, all registered TSOs in Scotland need to

provide their balance sheet and financial statements annually. The full annual report normally includes summaries for all activities carried out as well as financial performance throughout the year. Therefore, it is reasonable to study annual reports of the three organisations to gain better understanding of their organisational development as a whole. Age IT did not become independent until 2004, but the other two both had been established much longer. It was impractical to study all their annual reports due to the time restriction; moreover, such a document format was not common at the beginning of the 20th Century, and in any case VM was not in place for most of their history. Indeed, VM did not attract attention from TSO practitioners until the recent financial crisis started in 2007, when many TSOs faced impact from public spending cut across the UK and experienced a rising need for a volunteer workforce to replace paid employees. Therefore, it was sufficient to review the annual reports from 2000 to now, as they described the development of VM within the TSOs, the impact of the recession, and how the organisation adjusted its strategies to survive.

Other document types

In addition to annual reports, it was essential to review all VM related policies and practices. These varied among the participating organisations. Furthermore, current volunteers' profiles were also requested, with some success; Age IT did not provide their volunteers' profiles, but this had been discussed during the research agreement negotiation. EL Centre provided brief information on the current number of volunteers in different roles, plus their ages; while EC Support provided befriending volunteers' self-written profiles used by the TSO for client matching. Table 3.4 provides a full list of the documents reviewed in addition to annual reports. Not all documents were studied in detail, for example, less relevant items like policy and procedures established to fulfil legal requirement, health and safety regulations or similar. Only documents in bold in table 3.4 were studied, as showing VM policies and practices set up by these TSOs.

Table 3.4 a list of documents reviewed by research TSO

| Age IT | EL Centre | EC Support |
|---|---|---|
| **Volunteer agreement (Outreach service)** | **Application form for Helper** | **Volunteer profiles** |
| **Volunteer role description (Out service)** | **Befriending service helper role description** | **Befriending Agreement** |
| **Volunteer check list & application form** | **Café Connect helper role** | **Protection of vulnerable groups policy** |
| Confidentiality policy | **Volunteer interview guidance** | **Volunteer 1st interview questions** |
| Disciplinary procedure | **Volunteer receptionist role description** | **Befriending Volunteer procedures** |
| Sexual & Racial Harassment Policy & procedure | **Volunteer reference form** | **Disciplinary procedure for volunteers** |
| Rights, Risks & Responsibilities | **Volunteer expenses claim form** | **Volunteer agreement (board member and other)** |
| Policy against abuse | **Contact details in case of emergency** | **Volunteer supervision questionnaire** |
| Comments, complaints & suggestions | **Day care helper role** | **Revised Lone working guidelines** |
| | **Day care pupil volunteer application form** | **Revised code of conduct** |
| | **Day care helper application form** | **Revised complaints procedure** |
| | **Interview Record sheet** | **Revised volunteer policy** |
| | **Current volunteers list** | **Revised befrienders' expenses policy and procedure** |
| | **Helping Hand programme assistant role** | **Revised Boundary policy** |
| | **Helping Hand programme ambassador role** | **Befriender role description** |
| | **Induction check list** | **Causes of accidents in the home risk assessment training** |
| | **Lunch Service helper role description** | **Volunteer statistics** |
| | **Risk Assessment template – Day care** | **Disability awareness part one induction training** |
| | **Risk Assessment template – other volunteering roles** | **Disability awareness part two induction training** |
| | **Retail volunteer role description** | **Emergency contact and useful numbers** |
| | | Equality opportunity survey form |
| | | Revised smoking and home visits guidelines |
| | | Confidentiality group questions |
| | | Self-declaration form PVG |

Data from the supplementary document study included secondary data, recorded
using a 'Document Summary Form' (adapted from Miles and Huberman, 1994, 55),

see a copy in appendix 7. Annual report information was recorded using 'grid for annual report'; see appendices for a sample template. EC Support had the most structured annual reports including editing and printing quality. That organisation also presented the highest level of information to its readers. Consequently, the information drawn from EC Support documents was also the most comprehensive.

## 3.6 Data collection and analysis

### 3.6.1 An overview of the analytical framework

The purpose of collection the data was to reveal the complete process of the VPC, and thus to better understand its interrelationships with actual VM. The VPC is embedded in VM. This data collection approach is held to demonstrate the link between making and fulfilling VPC and planning and implementing VM, hence indicating the value of studying the psychological contract as a process. The multiple players within an organisation each bring their own perceptions of how to perform within their organisation; they further influence each other through interacting, just different threads interweave a piece of 'fabric' (Frank 2010). This 'fabricating' view is a good approach to understand how these players interact, how they influence each other's perception of volunteer contribution and the need for VM, and ultimately influence the outcome of VM.

As the context of VM planning and implementation involves three main players within TSOs (refer to section 3.5.1), multi-perspective exploration is considered useful to obtain a fuller picture on how VM is perceived by the players. This approach enabled all data to be interwoven in order to provide a better understanding of the influence of individual perception. This approach is considered compatible with the concept of 'fabrication mechanism' (Frank 2010). It was observed that individual participants talked about their different personal experiences of either being involved in VM or volunteering. Their ways of organising answers to interview questions were considered to be the fabrication of their narratives of experience. Furthermore, their perception influenced those narratives, which in turn fabricated their roles and identities in the process of making and fulfilling the VPC.

**Triangulation**

The aforementioned 'fabrication' was achieved through triangulation in data analysis. Triangulation is "a process of using multiple perceptions to clarify meaning, verifying the repeatability of an observation or interpretation"(Stake 2003, 148). The application of triangulation offered clearer understanding of how individual perceptions influenced the VM planning and implementing activities through analysing: 1) the documents and interview transcripts on volunteer contribution, 2) how the need for VM was reflected on the relevant documents, and 3) how the CEOs and the VCs perceived them. The study is designed to apply two triangulation approaches.

First, 'Theory triangulation' (Denzin, 1970, 1978) led to develop the conceptual framework with embedding multi-theory. The topic can be better understood if it is explored from both an organisational perspective (SHRM & HR role of line managers) and individual perspective (the making and fulfilment of the VPC). At another level, the exploration of the VCS entailed studying different *individual* perceptions (i.e. CEO, VC and volunteer) on volunteerism and the need for VM. Interactions, behaviour and performance of these three actors are analysed against TSO characteristics and development needs. Secondly, 'Data triangulation' (Denzin, 1970, 1978) helps analyse the collected data reflecting those three types of individual's perspectives (CEO, VC and volunteer). It is held to better illustrate how these different individuals influenced the actual VM outcomes, and thus to minimise the generation of meanings which can be misinterpreted by researchers in conducting case studies (ibid).

Whenever the term 'triangulation' is mentioned in methodology reviews, it is generally considered to be the use of multiple methods (Blaikie 2010; Campbell and Fiske 1959; Denzin 1970). However, a number of other triangulation approaches have been identified: Data triangulation, Investigator triangulation and Theoretical triangulation (Denzin 1978; Denzin 1970).

> "**Data triangulation** has three subtypes: (a) time, (b) space, and (c) person. Person analysis, in turn, has three levels: (a) aggregate, (b) interactive, and (c) collectivity. … **Investigator triangulation** consists of using multiple rather than single observers of the same object. … **Theory triangulation** consists of using multiple rather than single perspectives in relations to the same set of objects." (Denzin 1978, p.295)

According to the above view, the data triangulation approach in this study suggests it is 'person oriented' triangulation at the level of collectivity, i.e. TSO as the study unit. Behaviour and performance of the three actors thus "reflect pressures and demands of the total collectivity" (Denzin, 1978, p.296); i.e. the pressures and demands of TSO development. Once again, the researcher stresses that the selection of the analysis approach is informed by the research topic rather than by the popularity or reputation of any particular approaches.

**Researcher's reflection on data collection**

In the earlier discussion about using the 'active interview' as the data collection method, the researcher reported that her active participation helped to shape interviewees' responses in order to obtain more specific information relevant to the research, to augment more general information concerning individual perceptions of volunteering. For example, when interviewing the befriending volunteer who was from China, the volunteer talked about her previous volunteering involvement in both China and South Korea. The information was very interesting in terms of comparing volunteerism differences between the two Asian countries; however, the researcher was aware that the information was of little relevance to this particular research. Therefore, the volunteer's attention was subtly diverted back to the actual study topic. However, it is acknowledged that this volunteer's previous experience undoubtedly heavily influenced her decision to engage in volunteering in Scotland. It also shaped her expectations of gaining more knowledge about how to effectively manage and support volunteers, which became her motivation for joining EC Support.

Interestingly, in another interview with the IT class volunteer at Age IT, the researcher did not fully divert the interviewee's attention from talking in detail about

his previous volunteering. While the data appeared not to be that relevant, the researcher also observed that the volunteer was deeply drawn to particular aspects of volunteering involvement, such as education volunteering in Africa and computer related roles. Although there was little mention of how he found this role with Age IT, his narratives on his general volunteering experience actually reflected his motivation for joining Age IT. For some volunteers, volunteering is a habit, such volunteers did not pay great attention to or expect too much of the support they would get; their focus mostly lay in their interests in doing what they 'enjoy' the most.

### 3.6.2 Data management

All of the data collected at the main study stage were qualitative including both empirical and secondary data. Secondary data from the document study served as supplementary data to help to better understand the TSO influence on VM. Three sets of interview questions were designed for three roles (see appendices for the interview questions) – CEO, VC and volunteers. The purpose was to guide the interviews towards topics more suitable for each role; hence data collected would better answer the research questions. It was intended to explore the CEO's perception of his/her approach to setting organisational strategy, and hence planning VM. For VCs, interview questions targeted the VC's interpretation of the volunteers' contribution to organisational objectives, and hence his/her approach to implementing VM. For volunteers, the goal was to obtain self-narration on how they engaged with volunteering work, i.e. their cognitive map of the internal process of accepting the VPC. Volunteer interview questions were developed to reflect key stages of the process of making volunteer psychological contract. However, one common topic, involving all three 'actors' was VM planning and implementation, including how the VPC was made and fulfilled. Consequently, interview questions were designed to guide all interviewees to express their own views of this topic. Furthermore, during an interview the researcher adapted questions to individual interviewee's experience and narration, in order to better capture valuable information.

Documents were reviewed by identifying and recording relevant information using an adapted version of the 'document summary form' (Miles and Huberman 1994) (see a sample form in appendix 7). The form allowed the researcher to record the following information: document type, brief description as well as notes on 'significance of document'. It also helped the researcher to highlight information particularly relevant to the study topic. Data from some documents were also interpreted to explore how they reflected the TSO view and stance on introducing VM activities. Data through document study could provide written information demonstrating how the CEO and VC's personal experience and their perceptions impacted on actual VM. This is seen to shape how VOR is established, since volunteers' interpretation of written information could yield different understandings on organisational expectation.

In total, there were five VCs interviewed, all with different job titles indicating additional job responsibilities. Out of these VCs, three were project managers: Outreach project manager at Age IT, Day-care project manager at EL Centre and Befriending Project manager at EC Support. The volunteer manager at EL Centre also had a shared responsibility as the Ca(i)re project manager (approximately 60% of her contract hours are for managing the project). In addition, there was a newly recruited Befriending project assistant at EL Centre. The term VC was used in data analysis although it was acknowledged that there were different job titles for each participating VC. These specific job titles were used to signpost interview quotes.

All interviews were transcribed using software supporting audio file transcribing, using NVivo 10, which allowed initial data management. NVivo 10 was selected after both recommendations and self-trial, and is one of the most widely used qualitative analytical tools. NVivo 10 is also the latest version tested to offer stability and reliability. However, not all displays were created using relative NVivo 10 functions. During the actual data analysis process, it was found that NVivo was more a data organising tool than a data analysis tool. It was efficient at generating summary reports on researcher's input, but the software was unable to generate conclusions and results automatically.

In order to record the researcher's self-reflection on interviewing participants, memos were produced after each interview to describe interviewees' basic information such as demographic profiles, brief accounts of their relevant experience and the researcher's initial reflection. These notes were valuable as they mapped out interviewees' narratives, and contributed to developing the cognitive map of the process of the VPC. Memos produced by the researcher were more useful in data analysis in terms of generating meanings and findings, as they summarised relevant information about individual participants, and that information offered better understanding of the influence of individual perceptions on the study concept. Therefore, summary tables and figures were created manually by the researcher using relevant functions in Microsoft Word 2010 and Excel 2010.

### 3.6.3 An overview of the coding approach

Multiple coding methods were applied to analyse interview transcripts, including descriptive and interpretative coding. The coding methods were applied under the guidance of Miles and Huberman (1994). Descriptive codes were produced inductively to capture information about individual demographic profiles (CEO, VC and volunteer), their perceptions on volunteerism and VM, and accounts of their responsibilities. The information was analysed and showed how individuals perceived volunteer contribution and the need of effective VM planning and implementation. Themes from the initial study and literature review (refer to appendix 3) helped to generate interpretative codes for both interview transcripts and documents/notes of document review (see appendix 14 for lists of codes).

Codes were organised to present the process of VPC making and fulfilment, and were linked together to show relationships between different stages. Seven themes were generated reflecting different stages of the VPC, see table 3.6 below. The term 'boundary' was mentioned by more than one coordinator when they talked about what was considered important information for volunteers during initial training. 'Boundary' seemed to refer to the fine border line between work and personal life; as the TSOs delivered social services to disadvantaged people, the VCs felt it important

not to let volunteers be emotionally over-influenced.  This was to prevent their being inappropriately affected by clients' unfortunate life stories. Neglecting such a boundary likely increases volunteer stress level. Furthermore, the category of 'various levels of recognition for volunteer contribution' is reflected in how TSOs record this in their annual reports.

Table 3.5 a list of thematic categories generated

| | Factors relevant to VM | Indications of these factors |
|---|---|---|
| **TSO needs (external factors)** | Types of TSO VM policies and practices | Professional volunteer management (HR approach) |
| | VM practices fit for TSO needs | Uniqueness of managing volunteers |
| | Reasons for TSO to use volunteers | Various levels of recognition of volunteer contribution |
| | TSO expectations to VM | Irrelevance of formal structure |
| **TSO Promises** | Promised commitment from TSO | Respect of free will for volunteering |
| | Terms of promises by TSO (VM practices) | Reciprocity of expectation |
| | TSO expectations of volunteers | Understanding boundary; Volunteer crucial to small TSOs |
| | VM practices | Professionalised (training and development); Formal structure (intended VM) |
| | CEO expectation of establishing VM structure | **Influence of leadership style (perception)** on actual VM |
| | Explicit volunteer agreement terms of TSO | Interpretation of contract terms |
| | VC Expectations of VOR | Personal experience/background and its influence on VM  approaches |
| **Acceptance – Encoding** | TSO expectations of volunteers | Responsibility as volunteers |
| | Expectations of VOR building and maintaining through boundary setting (both parties) | Boundary vs. professionalization |
| | Volunteers' expectations of TSO | Satisfaction if self-expectation met |
| **Acceptance – Social cues** | Expected way of  building relationship | Communication (btw coordinator and volunteers) |
| | Expectations of VOR | Building good Relationship |
| **Acceptance - Predisposition** | Volunteering motives | Reasons for volunteering |
| | Self-expectations of volunteering | Outcomes expected to get from volunteering |
| | Influence on volunteering motives | Personal attributes (demographics) |
| **Acceptance - Decoding** | Volunteers' beliefs about TSO | Reliance of volunteer and organisation |
| | Volunteers' expectations of themselves | Volunteer behaviour within TSO |
| **Reliance (impact of contract fulfilment)** | Satisfaction with volunteering | Change of expectation (Satisfaction) |
| | Expected outcome of good VOR | Perceived contribution of Psychological contract to managing VOR |

It is considered suitable to display data by giving an account of a series of events following a logical flow (Miles and Huberman 1994). This helped to pull together all themes that emerged from interview transcripts following the process of VPC making and fulfilment. In this context, volunteer interviews produced data that reflected volunteers' perceptions on volunteerism and VM. The process of VPC cannot be explicitly presented based on tangible data, as it is an implicit agreement between volunteer and TSO. But the process could be revealed through volunteers' self-narratives. Their views on the context showed in their ways of narrating, hence indicating different the stages of the VPC process. Unspoken/understated activities and/or experience could be considered as further highlighting individual perceptions on volunteerism and VM.

Summaries of participants' profiles were grouped into two categories – TSO managers (CEO and VC) and volunteers (see appendix 9 and 10). CEOs and VCs from all three TSOs were grouped together and clearly labelled to indicate TSO, i.e. 'AI' for Age IT, 'EC' for EC Support and 'EL' for EL Centre. The same labels were used for volunteers. In relation to understanding individuals' role and identity, the display of individual profiles helps to identify motives, expectations and the formation of perceptions. In looking at volunteering motives, a number of factors were studied: volunteer age group, educational and occupational background as well as previous volunteering involvement, as discussed in section 1.3.1 in Chapter One.

## 3.7 Chapter summary and conclusion including researcher reflection

This chapter looks at two broad aspects in research design – review of the research philosophical stance and methodologies, and the descriptions of the empirical study including data collection and management. The social world is held to be constructed based on how human actors interpret the social environment they are in, and how they give their account of all events and activities undertaken within that environment (Crotty 1998). This claim, depending on how it is interpreted, bears a sense of Postmodern approach to the social realities, particularly considering that the

majority of the data are collected through conducting active interviews, and that the researcher applies a reflexive approach to conduct the study (Fontana 2002; Kroeze 2012; Thompson 2002). On exploring the research topic, interactions among human actors (CEO, VC and volunteer) are considered as facilitating VM planning and implementation through the process of making and fulfilling individual VPC. Informed by theoretical debate of the Psychological Contract Theory (refer to section 2.4 in Chapter Two), individual perception influences the outcomes of the VPC process. This is further understood as having an impact on the effectiveness of actual VM. Multiple (instrumental) case studies were conducted at the main study stage, key actor behaviour within TSO were explored through their own narratives elicited through in-depth interviews.

The empirical study was carried out based on philosophical and methodological considerations. The process of data collection and management (initial study and main study) was described. Initial study outcomes were used to generate meaningful categories to develop the conceptual framework to answer research questions. In conducting the study, the researcher held a co-construct position. The researcher's participation is seen throughout the study, from selecting the topic, setting the research scene to preparing for data collection, collecting data and analysing data. The researcher's view played a crucial role in understanding the researched phenomenon and related theoretical debates. A key drive of conducting the study came from the researcher's own work and educational experience. Although a new context (VM) was explored in a different area (the TSO), the core concept of the study lies in researcher's general research interest. It is acknowledged that the researcher's perceptions influenced the study outcome in data analysis and summarising, but the research process also helped the researcher to shape theoretical and methodological understandings. The three case study organisations' profiles and analysis overview are described in the following chapter (Chapter Four), followed by three analysis chapters (Chapter Five, Six and Seven) and the final chapter (Chapter Eight).

# CHAPTER FOUR: Case organisations and analysis overview

## 4.1 Overview

This chapter provides a detailed account of the three researched TSOs and offers an overview of the data analysis plan. The analysis plan will serve as an introduction to the following three chapters of detailed analysis (Chapter Five, Six and Seven). Contents are arranged by TSO, including an organisational overview, then an introduction to its volunteer workforce and VCs, followed by VM policies and practices. The information is drawn from a number of sources, including survey responses at the initial study stage, initial meetings with the TSOs, documentary study, TSO websites and interviews with CEOs and VCs. It is not the intention to provide a comprehensive account of a TSO's entire historical development, as this information is considered to be little related to the research focus. Annual reports from 2000 to 2011 were reviewed, a period including the 2008 financial crisis. As reviewed in Chapter One, this crisis and recession are considered to affect the development of the sector in terms of its austerity measures and sustained activities (refer to section 1.2.3). However, Age IT did not become an independent TSO until 2004, so its annual reports were reviewed from 2004.

The three TSOs provide various types of services to different targeted clients. Their governance structure, operations and core activities also vary, hence different volunteering roles were set up. Therefore, it is necessary to introduce organisational backgrounds in order to better understand the impact of effective VM planning and implementation on attracting, engaging and retaining volunteers. TSOs are introduced in alphabetical order. Table 4.1 provides an overview of the three selected TSOs; the information is drawn from the document study and their organisation website.

Table 4.1 – Overview of the three researched TSOs

| | EL Centre (est. 1980) | Age IT (est. 2001) | EC Support (est. 1902) |
|---|---|---|---|
| Type of org | Community centre | Computer training service for 50+ age group | service for physically disabled |
| Mission and Objectives | "A Christian organisation that acknowledges that infinite value and potential of each unique human being. It is endeavouring, through its current services to maintain a full programme addressing physical, emotional, intellectual and spiritual needs." | "To promote, maintain, improve and advance the education of older people for the public benefit." | "To prioritise our resources for the benefit of disabled people who have a physical impairment which substantially affects their mobility, manual dexterity or physical coordination, and the impairment either affects their normal day-to-day activities or is long term." |
| Core activities | .the Lunch Club .the Ca(i)re project .the Dementia Care Programme .Cafe | .Computer training .Social inclusion outreach project .External training for organisations and individual (charged) | .Befriending project .Classes .Grants |
| Source of funding | .Large anonymous donation (various types) .Capital grants .Self-generated revenue .Fundraising | .Public funding from local council .Income through delivering external training to organisations .Fundraising .Other funding bodies | .Capital grants .Donations .Self-generated revenue .Fundraising |
| Workforce size (staff/volunteer) | 19/69 | 7/60 | 12/24 |
| VM policies and practices in place | .Recruitment & selection – application form, reference, written role description, formal interview procedure .Training and support – induction, performance review, training and learning, recording of work | Recruitment & Selection – application form, CV and cover letter, reference, written role description, information session Training and support – induction, (off the job) training, networking, recording of work | .Recruitment & selection – application form, reference, written role description, formal interview procedure .Training and support – induction, performance review, training and learning, recording of work |

## 4.2 Age IT Computer Training

### 4.2.1 Organisation and the CEO

Age IT is the youngest TSO of the three, as it did not become independent until 2004. The current CEO is also the founder of Age IT, who identified a need for elder people to learn basic computer and IT skills when she was involved in Age Concern Scotland – a national TSO supporting elder people across Scotland. In fact, Age IT was operated as an affiliate of Age Concern Scotland in the early 2000s. The organisation's objectives are to encourage the 50+ age group to learn basic computer skills, internet access and email; this is to broaden their knowledge and keep up with the societal development.

> "The relentless advance of technology is being paralleled by the phenomenon of the 'greying population'. If older people are not helped to catch up and use the technology, we will be faced with a serious 'digital divide', whereby a growing proportion of those whom technology would help to remain independent and 'connected' members of the community, become instead isolated and disenfranchised."[16]
>
> (CEO, Age IT, 2004; on organisation website)

As shown in table 4.1 above, Age IT activities are mainly funded by the local authority i.e. the city council's Health & Social Care Department. Its core activities are the IT classes and outreach project, plus ad hoc intergeneration projects arranged upon request. Funding from the council covers all expenses including salary for the outreach project. Therefore, the CEO is required to produce a project report for the council in order to renew the funding. When the data collection was undertaken, there were seven paid employees, with their working hours equivalent to approximately four full timers.

The majority of fundraising activities are planned and organised by the CEO, including writing applications to various funding bodies, producing reports for funding renewal and organising fundraising events on site. Additional non-CEO responsibilities include managing IT class volunteers. She is undoubtedly the core of the TSO; not only is she responsible for almost all aspects of the TSO, she also selected her trustee board to ensure the balanced knowledge and experience needed

for running a TSO. A project manager (the VC described below) is mainly responsible for the outreach project and its volunteers, with additional work in TSO administration. There are limited formal policies and practices. Age IT had no independent annual report until 2004 when it became independent. The project proved to be a success since the services it offers had not been available in the past; thus, the TSO has had an increased public reputation since 2004. This success has also led to an advantage in volunteer recruitment and selection as many people want to volunteer there drawn by the core activities. The outreach project expanded and received various public recognitions. However, despite the increase in reputation, Age IT still struggles with funding. There is always limited financial resource to expand the workforce. For the CEO, "time is money"[17], due to her excessive workload. The CEO also appeared to have a high level of control of the TSO; review of her working style is provided in the following chapter. Therefore, she has been reluctant to delegate some of her work.

### 4.2.2 VC and volunteers at Age IT
### 4.2.2.1 VC

The official title for the VC is Volunteer Manager. In fact, her main responsibility is project manager of the outreach project. The VC joined Age IT in 2008, but she had been involved as an external volunteer recruiter for the project earlier. With this previous experience of working with volunteers, she was recruited as the project manager after her old role was made redundant.

Although the VC's contract was full time, her working schedule was adjusted to suit the needs of the organisation, as she and the CEO were the only two managers. The project was already established when she joined, so this gave her more flexibility in working with volunteers. She was able to organise social activities for volunteers on a regular basis, often monthly. This enabled her to have closer contact with her volunteers, and she has been able to utilise her professional skills and knowledge to manage and support project volunteers.

**4.2.2.2 Volunteers**

Volunteers at Age IT account for almost ninety percent of the total workforce. There are both IT class volunteers, and project volunteers (a larger proportion of the workforce). Indeed, the outreach project is solely delivered by volunteers, with paid employees only responsible for volunteer support, not for delivering service. Therefore, the CEO and the VC acknowledge the importance of volunteers' contribution and are very grateful for their long-term commitment. Although the annual reports provide limited information on volunteer recognition, this notion was constantly raised during research meetings. The VC especially highlighted the particular advantage of project volunteers who are in the 50+ age group, whose dedication and commitment have made immense contribution to the project success.

> "The project relies on the hard work of our loyal group of volunteers who visit care homes every week for 3-4 hours. Through their patience and creativity [the outreach project's name] volunteers have introduced many older people living in care homes to computers and shown them new ways of keeping in touch with friends and family through email and Skype…We are fortunate in having a very low turnover of volunteers who clearly enjoy contact with residents, their families and care staff."[18]
>
> (Introduction of the project volunteers, TSO website)

**4.2.3 VM at Age IT – Outreach project focussed**

Little information comes out of reviewing Age IT's annual reports, particularly as regards its VM. They cover the key sections required by regulations. They tend to reflect that the CEO does not spend much time (or does not have much time) in preparing annual reports. On the other hand, the website gives more information in terms of the development of the TSO and the introduction of any new activities. In addition, there is also a newsletter although not regular issued via email to give updates on the TSO.

The VM at Age IT mainly pertains to support for project volunteers, not for IT class volunteers. Overall, VM at Age IT is loosely set up. There are limited policies concerning the volunteering role. Most of those are in place to meet the minimum requirement from charity legislation in Scotland. Compared to the CEO, the VC carries out more VM work to ensure all project volunteers enjoy their volunteering

work as much as possible. The VC receives regular updates on volunteer performance through a subordinate project coordinator, who makes regular site visit to offer technical support to volunteers. In addition, the VC also speaks to volunteers on various informal occasions such as social gatherings and fundraising events. Although there is no established structure for review and feedback, the VC encourages open communication and invites volunteers to approach her whenever necessary. Broadly speaking, project volunteers tend to have low level of turn-over (detailed analysis is provided in Chapter Six and Seven). Consequently, Age IT does not need to put much effort into volunteer recruitment. Many people enquire about volunteering opportunities on learning about the project, and there is in fact a 'waiting list' – a database to keep all potential volunteers on record for future contact.

On volunteer training and development, project volunteers are given a ten-week initial training before being placed in different retirement houses.

> "[Project] volunteers need to have basic computer skills, but they must also enjoy the company of older people. Before being placed in care homes, volunteers undergo a 10 week training course to prepare them for their role. This course includes instruction in setting up email accounts as well as facilitating Skype contact. Volunteers are also given an awareness of working with vulnerable groups and the importance of respecting confidentiality."
> (Introduction of the project volunteers, TSO website)

Once the training is completed, volunteers start their work under peer support along with the usual technical support from the project coordinator. There is no VM practice explicitly stating what types of support (non-technical) are provided. Such support tends to follow individual needs. The project is perceived to benefit from a highly committed volunteer workforce as almost all volunteers are 50+ in age group with substantial life experience and professional skills and knowledge.

## 4.3 EC Support

### 4.3.1 Organisation and the CEO

EC Support was established in 1902, marking it the oldest TSO of the three. It targets the needs of physically disabled residents within the Edinburgh area.

"…the voluntary organisation [is] dedicated to giving friendly and practical help to physically disabled people. To achieve this [the organisation] does everything from running classes through to providing individual grants for holidays and equipment and supporting initiatives to bring greater freedom to physically disabled people - including our dynamic <u>befriending</u> project."[19]

(TSO homepage, 2013).

EC Support sees itself as an independent TSO, as its financial resources do not largely rely on public funding; hence there is little pressure from 'contract bidding'. All of their core activities are initiated and implemented within the organisation once the board of trustees has approved them.

Studying its annual reports indicates that the organisation has developed different activities around supporting the client group. While it is seen as positive for the organisation to have autonomy in operation, the organisation has also realised that fragmented activities seem to have resulted in high cost with ineffective implementation outcomes. The current CEO was appointed in early 2005 by the board. He was expected to introduce some changes to the operation as EC Support was "going through a difficult time" (CEO interview data). The board members wanted the CEO to review the organisation's current activities and management structures. As a result, three core activities were announced in the following annual report (2006/07) – Grants, Classes and a new befriending service. Since the start of the financial crisis in 2008, the organisation has introduced different management practices to reduce cost on a "value for money" basis, i.e. reduced workforce and reduced operating cost.

The appointment of the CEO seemingly brought changes to many aspects in addition to his primary task of "taking the organisation into 21st Century" (CEO interview transcript). In addition to the new befriending service, there is also an increasing notion of volunteer recognition. Mentions of volunteer contributions have been in the annual report since the 2005/6 issue, in which all volunteers' names were listed at the back of the report. Furthermore, the CEO has devoted the majority of his time on external affairs. The outcome of his work has had positive impact on EC Support's

development. There has been an increase in public reputation, increased influence on policy making to support physical disabled people, and an increase in partnership with the Scottish Government, local authorities and organisations from other sectors.

### 4.3.2 VCs, Volunteers in the befriending project

The commencement of the befriending project in 2007 dramatically increased the number of volunteers compared to previous years. Before the befriending project, there were mainly ad hoc volunteers, who had helped with classes for many years. Now, volunteers delivering the befriending service average 75% of the total workforce of the organisation (see table 4.1). The following report section shows that the CEO recognises the contribution of befriending volunteers.

> "The Befriending Project is expanding apace and it is really heartening to hear about the difference that our volunteer befrienders are making to the lives of those they befriend, and to hear about the success of our meal companions and facilitated friendship as well."
>
> (CEO Reports in annual report, 2009/10)

The befriending project was introduced by the CEO because there were not any befriending services in the city for physically disabled people.

> "The project aims to recruit volunteers to befriend those physically disabled adults who are most isolated for many reasons, mobility issues, communication issues, limiting care packages etc. [The organisation] befriending Project will match volunteer befrienders with befriendees, support and supervise relationships and allow them to develop naturally to promote confidence, reduce isolation and increase resilience and challenge stigma and discrimination."
>
> (EC Support annual report, 2007/08)

Upon receiving a large grant from an independent funding organisation, the befriending project was set up and the funding was allocated for 3 years. The project was designed to use volunteers to deliver services. It is independently run, and its large financial capacity also helps to sustain the project despite the general cost reduction exercise within EC Support. The launch of the project was successful thanks to the first group of volunteers. A new section of the project was announced

in the 2008/09 annual report; it included information about introducing the service, about its operation after the original launch, and about its volunteers. The first round of befriending volunteer recruitment went well. The project development in the year 2009/10 continued relatively smoothly. Its success was also recognised throughout the organisation. By the end of 2010, there were total of 20 volunteers, the majority befrienders.

> "Our wonderful volunteers are from all walks of life, people who are retired, students, able bodied, disabled and they are all out there visiting people regularly to keep them company, play games, chat or go out socially."
> (Befriending project report, in annual report, 2009/10)

However, instability in the volunteer workforce is still a major concern. Consequently, there was an additional recruitment call at the end of the annual report section.

> "…my biggest problem at present is finding enough volunteers to meet the demand – so if you, or someone you know, can help please give me a call."
> (EC Support annual report, 2008/09)

In 2010, the current befriending manager took over. She introduced more formalised VM practices. In addition to improving existing VM practices for recruitment, selection, training & development, and review, she also set up regular volunteer focus groups. These aim to provide a socialising space for all befriending volunteers, enabling them to receive support from both the organisation and peers, as well as facilitating service quality improvement. The focus group is organised on a monthly basis, and is designed to be informal, interactive and fun. These changes were reflected in the annual report 2010/11. A befriending section was formally organised with clear section headings after a general introduction from the Project manager. The titles included "current befriending matches", "general befriending", "lunch buddies", "facilitated friendships", "endings [of befriending service]", and "training and volunteer support".

More information was provided in "training and volunteer support". Not only were the benefits for "befriendees" highlighted, there was also an acknowledgement of the

benefits offered to befriender volunteers, indicating a notion of expanding the workforce.

> "The first ever Volunteer Focus Group and Social outing was organised in November and was a great success. Ten Befrienders came along, shared their experiences and gave feedback on their role at the focus group…A brand new project Facebook page was created in October to help befrienders keep in touch with one another and share useful tips."
>
> (Befriending Manager Report, in annual report 2010/11)

Furthermore, the project manager proposed a befriending volunteer Facebook group, to utilise social media to provide better support to befriending volunteers. Following from the proposal a need analysis for this was carried out at the end of 2011.

The most recent year (2011/12) saw substantial changes to the organisation. A new chairman was appointed who tended to value people's contribution more; this was reflected in the Chairman's Remark section in the annual report 2011/12. "[The organisation] would be nothing without the people – the volunteers, our funders…" The befriending project continued with more activities to support both its volunteers and clients. Aside from a more comprehensive section introducing the project activities, achievements and benefits to its clients, more information was offered on the support to its volunteers by increased training and development opportunities. A survey also had been conducted to "gain feedback from the current involved befriendees"; the result indicated a high level of customer satisfaction with their befriending volunteers. VM structure was improved under the current project manager, and the expansion of the project also led to the recruitment of a part time project coordinator. A more formal introduction was provided for the recruitment and selection of befriending volunteers.

> "To date we have 25 active Befriending matches. This includes 22 general befriending matches and 3 'Facilitated Friendships'… We held Volunteer Induction training sessions in April, June, September and January for 15 new volunteers. A volunteer focus group and social day was held in May and in November for existing volunteers to come together, share ideas, overcome challenges and keep motivations going. Using Wheelchairs Safely training is organised for those Befrienders who are matched with a wheelchair user and First aid is offered to those who have been matched for at least 3 months.

Handling Emotions & communication was a specialist workshop held in October to help support volunteers who were matched with someone that may be difficult to communicate with for one reason or another. It was conducted by … who is a trained counsellor and 10 volunteers attended. It was very important to discuss ways that Befrienders can 'protect' themselves from becoming too emotionally involved with their befriendee and dealing with traumatic or stressful information that may be disclosed to them during their role."

(Befriending manager report, annual report 2011/12)

## 4.4 EL Community Centre

### 4.4.1 Overview

EL Centre is the largest TSO of the three in terms of its paid workforce and range of activities. It was founded by local people in 1980. Unlike the other two TSOs, the centre has the physical asset of ownership of their current premises. The centre originated in religious belief, hence many volunteers become involved on this basis. It offers various core activities to serve its local community, including activities rooms, a Day Care Service for people with dementia; the Ca(I)re Project providing free educational, social and health based courses across the city for carers; a low cost office rental for small charities. In addition, there is a small charity shop selling second-hand baby clothes, and the centre re-opened its café in June 2012 to create a social space for local residents.

"The Centre is dedicated to inspiring, empowering, and supporting people of all ages, cultures and abilities, as an expression of compassionate Christian values."[20]

(Mission Statement, EL Centre)

There is a clear hierarchy in EL Centre's management structure. Although the researcher was unable to view the organisational chart, the volunteer manager introduced the structure, showing 3 main levels of position the excluding the trustee board. The top level is the CEO, with departmental managers at the next level responsible for main functions i.e. finance, and project management and administration. Below them are non-managerial employees across different functions. The current CEO has been with the Centre for eighteen years, including fifteen years

as the CEO. Prior to that, he was also involved in the third sector, influenced by his religious belief. The volunteer manager joined the Centre around one year ago, and carries a second title as the Ca(I)re project manager. She is responsible for volunteers at the café and the charity shop, as well as general admin volunteers including receptionist cover.

### 4.4.2 VCs and volunteers

### 4.4.2.1 VCs

The two managers with VC responsibilities are the volunteer manager, responsible for volunteers in the café and the shop, and the Day-care Centre Manager who is responsible for all volunteers in her project. The former was recruited about one year before the study, after the post was created by the Centre. Although she is a full time employee, her VC role is a shared role with management of Ca(I)re project. As the VC, her main responsibility is to develop a formal VM structure to help the Centre 'standardise' the VM from recruitment and selection to supervision and support. The Centre also sponsored the manager to attend a professional training organised by Volunteer Development Scotland (VDS), to help her develop management skills and knowledge.

The Day-care Centre manager is responsible for paid employees and volunteers on that specific project. The target client group is elder people with dementia; therefore, employees are required to have certain level of medical knowledge. The manager is a trained nurse, thus is responsible for training her employees and volunteers. She runs the project independently, particularly as regards management of employees and volunteers. Therefore, this project entails different VM from the structure set up by the volunteer manager.

### 4.4.2.2 Volunteers

There has always been volunteer involvement at EL Centre to support different aspects of TSO operation. Volunteerism is also considered a 'natural' behaviour influenced by religious belief. The range of volunteering roles at EL Centre incudes café assistants, charity shop assistants, admin help, a stained glass tour guide, building maintenance and Day-care Centre helpers. Furthermore, there are also

volunteers who help the Centre to raise money locally and internationally (information obtained from interviewing the CEO). It is acknowledged by the TSO that volunteers' demographic characters have become more diverse over the years, gradually moving away from mainly women who were able to have long-term volunteering commitment at the Centre. Therefore, the Centre also saw a need for professionally managing its volunteers, hence, the recent recruitment of the volunteer manager. Current volunteers are considered to have diverse volunteering motivations and expectations. More people are now volunteering at the Centre for personal and career development purposes. Consequently, the Centre established a formal structure to 'standardise' VM.

### 4.4.3 VM policies and practices in place

As shown in table 3.4 in Chapter Three, EL Centre now has a formal VM system, centrally managed by the volunteer manager with well-established VM policies and practices. She has also started to collect all volunteer information and to produce a database for easier volunteer management. With some professional help, the Centre was developing such software. However, volunteers at the Day-care Centre are still managed by the Day-care Centre manager who has different approaches to managing and supporting her volunteers, with few formally set up VM practices. Detailed analysis is provided later throughout the three analysis chapters.

In order to facilitate the 'standardisation' of VM, the organisation sponsored the volunteer manager to undertake a professional training course offered at Volunteer Development Scotland (VDS). She took advice and tips from the course to help her set up the new structure. This has been maintained properly and she has followed VM procedures fairly strictly.

## 4.5 An overview of the analysis

Following from the overview of the three TSOs, this section maps out how data were analysed and how findings were generated. The study findings are presented in Chapter Five, Six and Seven. Each chapter focuses on different aspects of the findings. The three chapters together complete the whole process of VM planning

and implementation, with the VPC process embedded, i.e. a) making and communicating TSO 'promises', b) volunteer forming 'beliefs' to 'accept' the contract (acceptance), and c) the contract fulfilment through relying on 'beliefs' (reliance) and beyond. The following three chapters answer research questions one to four. Each chapter is based on the process of VM, as shown in figure 2.4 in chapter Two. According to the figure, elements shown before the start of the three VPC stages indicate the process of VM planning. Analysis of these elements is elaborated in Chapter Five, which first presents the information which helped to lay out the three stages of VPC making and fulfilling, and then explores stage one. Stages two and three are revealed in Chapter Six, and Chapter Seven looks at the impact of VC's VM implementation on engaging and retaining volunteers.

On studying the VPC, it became clear that both contract makers — volunteers and TSOs — were involved in each stage, to various degrees. VCs were found to be the main contract makers representing the TSOs; but CEOs were considered to play an impact on shaping TSO 'promises' made to volunteers through promoting the TSO mission and objectives and the volunteering roles and benefits. Within each VPC stage, several factors influenced how effectively the stage was completed (see section 2.4 in Chapter Two). Analysis of the data follows the order of each step shown in figure 2.4; but the three chapters are structured to follow the process of VM planning and implementation. The influence of individuals on the outcome of VM planning and implementation is analysed along with the VM process.

The process of VM was considered to be the policies and practices set up to management volunteers within the TSO. The content of VM policies and practices were found to reflect the attitudes which CEOs and VCs held and approaches which they adopted to plan and implement VM. The findings indicated that the CEOs had main responsibilities of developing volunteer roles to suit the organisational objectives and the requirements of core activities, setting up and adopting appropriate policies and practices to manage volunteer workforce and acting as VC's line manager to support VC work. Because the CEOs recruited and managed the VCs, their perceptions were also found to have an impact on how the VCs carried out their

work and implemented VM practices. The VCs were directly involved in the VPC, therefore, their attitudes to volunteer contribution and VM, and to the approaches for carrying out actual VM, influenced VPC making and fulfilment. Finally the contract maker representing the TSO, the VC's attitudes and approaches to VM implementation, influenced the level of volunteer engagement to the TSO.

In the VPC context, external factors are the initial sources from which volunteers gain understanding of the TSO and their potential roles. These included TSO information  about the TSO, and about volunteering roles and responsibilities, together considered to be the TSO 'promises', i.e. what TSO would offer volunteers if they completed the tasks as expected. All organisational documents reviewed such as annual reports, volunteer recruitment information and VM policies & practices evidence TSO managers' perceptions and views on volunteer contribution and VM. These are incorporated in the process of VM planning as shown in figure 2.4 in Chapter Two, and are considered to inform how the VPC-related activities were carried out. Chapter Five thus focusses on the activities of VM planning and 'promises' making to form the VPC, showing how CEOs' perceptions influence the decision making for planning VM policies and practices.

Table 4.2 below illustrates different activities across the process of VM planning and implementation in parallel to VPC making and fulfilment. Influences of the contract makers' perceptions are indicated throughout different stages of listed activities. The symbol '*' indicates that the individual perception has direct influence on the outcomes of the activities at a particular VM process/VPC stage; and symbol 'v' indicates the indirect influence of the VC on VM planning. The findings showed that the CEOs had main responsibilities for VM planning, but some of the VCs were also charged with reviewing VM policies and practices. Detailed review of data analysis is provided in the following three chapters.

In the VPC context, the findings indicated that VCs played an influential role on creating volunteer engagement and retention; this was achieved by extending the VPC fulfilment beyond the individual's level of satisfaction, and resulted in the

volunteer's increase in commitment and engagement to the organisation. In addition to supervising volunteer performance by providing agreed volunteering terms (transactional and relational terms), VCs were an important influence on volunteers' satisfaction and maintaining their psychological well-being. Data from interviewing EC Support VCs and volunteers suggested a positive relationship between the aforementioned support from and the level of volunteer engagement. The VC's support was positively received by volunteers who became more engaged to their TSO; hence they tended to take more initiative to help with the organisational development. Individuals perceived the VC support differently, influenced by various factors. Details on this are provided in Chapter Six and Seven. Chapter Six focusses on exploring the complete cycle of VPC making and fulfilment from volunteer perspectives; and Chapter Seven focusses on the VM implementation process from VC perspectives. The analysis of how VCs *communicated* 'promises' is provided in Chapter Seven, although *making* 'promises' is in Chapter Five. This is because results chapters are organised from the perspectives of the three different key players — CEOs, volunteers and VCs. The analysis focus of how VCs communicated 'promises' is on the actual actions of making and communicating 'promises', not what are the 'promises' (focus of the Chapter Five). By discussing the findings from different individual perspectives, the researcher intends to offer in-depth understandings of the research context through triangulation.

Table 4.2 overview of the analysis structure

| The process of VM planning & implementation | | VM Planning | VM Implementation | | VM Implementation | | Impact of VM outcome on TSO and Volunteerism development | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Strategic planning: development of core activities | volunteer recruitment and selection | | volunteer training | support on volunteer performance | Increase in volunteer engagement to the TSO | volunteer workforce development and retention | Increased involvement in the sector |
| **The three stages of VPC making and fulfilling** | | **Making 'promises'** | **Communicating 'promises'** | **Reaching 'acceptance'** | **Fulfilling VPC through 'reliance'** | | **Outcomes of fulfilling VPC effectively - volunteer expectation met/volunteer satisfaction** | | |
| **Influence of contract maker perception** | CEO | * | | | | | | | |
| | VC | v | * | | * | * | * | * | * |
| | Volunteer | | | * | | | | | |

The study findings generally reflect the development of volunteerism under contemporary voluntary work arrangements (refer to chapter One), in that the studied TSOs recognised the value of the volunteer contribution and the need to manage and support the workforce to various extents. VM planning activities (such as the design of volunteering roles and responsibilities, VC recruitment and selection and the establishment of policies and practices) were carried out by the CEOs at organisational level. VM policies and practices were supposedly set up to facilitate the development and retention of the volunteer workforce to benefit the TSO; but in fact not all the VM practices were developed from 'bottom-up' (as discussed in section 2.2). Not all the CEOs in the study acknowledged the volunteer workforce as a *competitive* resource, bearing strategic importance, as per the RBV perspective in HRM (section 2.3). The findings support the claim that the CEOs' perception of volunteerism had more impact on how VM structure was developed, as well as how VCs should implement VM practices (these can be referred as *intended* VM). Their perception made an impact on what TSO 'promises' were made in making the VPC.

The data analysis reveals that the 'promises' were received by volunteers as 'external factors' (refer to section 2.4), although volunteers were unable to see precisely how and why the 'promises' were made (for example, how the CEOs viewed the benefit of volunteer contribution and the need for VM). Only the VM planning outcomes eventually make the TSO 'promises' visible to volunteers. Therefore, their interpretations of the 'promises' did not always match the CEO/TSO expectations as volunteers were found to rely more on their own understanding and interpretation, influenced to some extent by external factors such as friends/families, the VC, and public views of the TSO (the 'social cues' discussed in section 2.4.3). Such interpretation was diverse, as it was informed by individual expectations and motives. From the VM perspective, the finding showed that volunteers' diverse interpretation to some extent created discrepancies between intended and actual outcomes of VM planning and implementation (see Chapter Six). In addition to the influence of the diverse volunteer interpretation, the VC's performance in implementing VM practices was found to have a crucial impact on engaging and retaining volunteers (Chapter Seven).

# CHAPTER FIVE: How do TSOs make 'promises' to support volunteers

## 5.1 Chapter overview

Box 5.0 Overview of chapter analytical points

---

**VM planning activities within TSOs**

. VM policies, practices and forms of volunteer recognition

. Selection of the VC: Who fits in the role?

**Influence of CEO work motives, beliefs and approaches to work**

. Diverse responsibilities as a CEO in TSO – managing TSO with limited resources

. Influence of different CEO work focus and the impact on VM

    . Diverse CEO work focus

    . Influence on VM

. Diverse CEO styles – influenced by individual value, beliefs and demographic

    . Influence of CEO demographic backgrounds

    . CEO perceived value of volunteer and volunteering

---

Analysis provided in this chapter focusses on the detail of how the CEOs (TSOs) made 'promises' to recruit and select suitable volunteers. It begins by describing VM planning activities, including the design of the policies and practices, the VC role and the forms of volunteer recognition. This is followed by the considerations of different factors influencing the VM planning, including TSO objectives, core activity requirements, financial resource capacities and the impact of CEOs' views on the need for VM, reflecting their diverse demographic backgrounds.

## 5.2 VM planning activities within TSOs

The VM activities carried out by the CEOs shaped the 'intended' VM. These activities included the design of VM policies and practices; the documentation of volunteer contributions, and the creation and selection of the VC. The three CEOs acknowledged that these activities were essential to managing their volunteer workforce. There were also indications of how the VC role design made an impact on effective VM. Furthermore, these activities signalled what kind of public images

the TSOs created to attract individuals to join their volunteer workforce, referred as making 'promises' in the VPC context.

**5.2.1 VM policies, practices and forms of volunteer recognition**

**5.2.1.1 VM policies and practices in place**

Broadly speaking, the data revealed that two types of VM structures were developed: the formal and the informal. This was based on the VM policies and practices the three CEOs intended to have. The establishment of VM also reflected each CEO's view of why VM is needed – that is, either to ensure task completion/volunteer performance or to protect volunteer well-being (reflecting on section 2.2.3 in Chapter Two). According to the data, formal VM had more explicitly documented policies and practices (shown in table 3.4 in chapter Three). EC Support and EL Centre had formal VM in place, providing sufficient information on the volunteering work arrangement. Their CEOs reported that they recognised the needs for formal VM, based on different rationales; for example prevention of disorganised VM and realisation of strategic people management through standardisation (EL Centre), and protection of volunteers, clients and the organisation (EC Support). The established content of VM to a large extent is seen as the TSOs' 'promises' (the first stage of the VPC making and fulfilment), e.g. the types of organisational support to be given to the volunteers, and specifications of volunteer roles and responsibilities to ensure task completion. Through the interviews, all the CEOs reported they were involved in developing appropriate volunteering roles and responsibilities to attract suitable individuals to carry out core activities.

On considering the specific VM practices of the three TSOs, the level of detail reflected how their CEOs perceived the need for VM. This also implied whether or not they regarded the volunteer workforce to be (strategically) important. Table 5.1 below summarises how VM practices were implemented by the three TSOs. They reflect three broad categories of VM, matching some main HR compliance (as described in section 2.2) – 1) recruitment and selection, 2) training and development and 3) performance review. The three TSOs differed little in how they conducted activities in the first two categories: all the TSOs used a variety of advertising

channels to attract candidates, and they also had developed recruitment and selection processes including an application form, reference check and specifications of the roles and responsibilities. This observation shows that the three TSOs wanted their volunteers to possess more than just an intention of 'giving back to the community'. They had specific requirements for carrying out the role/delivering the service (see section 1.3). For example, the recruitment advert on the EC Support website indicates TSO requirements (underlined) in order to consider an application.

> "We are looking for volunteer befrienders who have <u>1 or 2 hours a week</u> they can use to <u>meet someone isolated by their disability</u>. Below you will find examples of some of the people we'd like to find a befriender for…"
> (EC Support website under volunteer section)[21]

However, the third category, the arrangement of volunteer performance review and feedback, varied a lot, from informal chat through regular formal one-to-one review meeting to regular group meetings. All were intended to implement the approach, but the findings showed that not all the VCs actually carried out the intended *regular* volunteer review and feedback (details in Chapter Seven).

Table 5.1 Summary of volunteer recruitment and selection across the three TSOs

|  | **Age IT** | **EC Support** | **EL Centre** |
|---|---|---|---|
| **Recruitment advertising channels** | Through local volunteer centre | Through local volunteer centre | Through local volunteer centre |
|  | Own website advertising | Own website advertising | Own website advertising |
|  | Informal referral (word of mouth) | Informal referral (word of mouth) | Informal referral (word |
|  | **Other – Libraries, local radio and press** | **Other – EUSA volunteer centre website; promotion through community centres/libraries** | www.volunteerscotland.org.uk of mouth) |
| **Volunteer recruitment and selection document and activities** | Standard application form; CV and covering letter screening, Reference | Standard application form; reference | Standard application form; reference |
|  | Written information regarding | Written information regarding responsibilities, | Written information regarding responsibilities, |

| | Age IT | EC Support | EL Centre |
|---|---|---|---|
| | responsibilities, selection criteria and benefits | selection criteria and benefits | selection criteria and benefits |
| | | Standard interview procedure with prepared questions | Standard interview procedure with prepared questions |
| | **Other – Information sessions for prospective volunteers** | **Other – PVG check [Protecting Vulnerable Groups Scheme]** | |
| **Approaches used to promote organisational value and mission** | On the recruitment advertisement | | |
| | At the interview (formal or informal) | At the interview (formal or informal) | At the interview (formal or informal) |
| | During volunteer induction | During volunteer induction | During volunteer induction |
| | During initial training period | During initial training period | |
| **Training and development arrangements** | Initial training | .Initial training on becoming a befriending volunteer .Various training courses offered during the work .Monthly focus group to refresh some work related issues | .Initial training for café volunteers .Informal work orientation for shop volunteers |
| | | | [Day-care Centre]: Initial training to understand how to work with people with dementia |
| **Volunteer review and feedback** | No structure in place, the VC has informal one-to-one conversations when the volunteers came to the office | Regular individual review meeting with volunteers and their befriending clients Informal communication when volunteers approached them Online forum enabling volunteers to provide peer support | Monthly group meetings by volunteering roles – Café volunteers; Shop volunteer |
| | | | [Day-care Centre]: Regular informal individual conversation during the work |

The TSO expectations from their volunteers included their interpersonal/communication skills, volunteers' willingness and ability to work with target clients, and volunteers' availability for committing to the role on a regular basis. Interpersonal skill was considered important by the three TSOs because their volunteering roles all involved service delivery (as described in Chapter Four). In making the VPC, these TSO expectations indicated that the VPC included both transactional and relational terms. The transactional terms (found in empirical and secondary data), referred both to time, such as 'minimum length of volunteering period' or 'frequency of volunteering work', and to money i.e. volunteering related expenses reimbursement. More relational terms were set up (to varying extents) across the three TSOs, as shown in the volunteer agreement and volunteer role descriptions. These terms fell into the categories of training and development and review/feedback. As shown in table 3.4, all of the TSOs' volunteer role descriptions included the aforementioned information. These terms were seen as the TSO 'promises' to their volunteers.

The findings showed that the majority of the volunteer agreements provided detailed information on expense reimbursement and structured work arrangements, such as the number of sessions/shifts with a set amount of time, and the expected minimum volunteering period (according to the contract types summarised in table 2.1 in Chapter Two). Only Age IT and EC Support had volunteer agreements. Their templates included similar items, mainly including 'Health and Safety', 'Confidentiality', 'Insurance' and 'Expense claim'. In addition, more details were covered in terms of training, and expected commitment (of befriender volunteers). These aspects of the agreement were considered to be transactional terms of the VPC. The information on the agreement regarding the support provided by the organisation was considered as relational terms.  For example, the information of the Befriending agreement implied that EC Support paid the most attention to catering for volunteer needs and protecting its volunteers (see appendix 8). This attention was felt to lead to better engagement and retention of volunteers (see section 2.2), and the findings also confirmed this claim: the CEO at EC Support stressed the importance of people to an organisation (see the analysis in section 5.2.2), and how the VCs at EC Support

carried out their work and how their performance made an impact on engaging their volunteers (details in the following two chapters).

### 5.2.1.2 Documenting volunteer recognition

The findings showed that none of the three TSOs made any formal arrangements for recognising volunteer work, although relevant information was made publically available. Ways of recognising volunteer work reflected how the CEOs positioned their volunteer workforce within organisation, and indicated how the public viewed these TSOs. Such a display potentially painted a positive TSO image to attract more people to apply for volunteering work. The acknowledgement of the volunteer contribution was included in the TSOs' annual reports and websites, but ways and content varied. For example, the EC Support annual reports had a variety of information about volunteer involvement and recognition. There was a special section on the befriending project with detailed information on volunteer contributions. Similar written content on volunteer recognition was found in the EL Centre's annual reports. While there was little mention of volunteer involvement in the annual reports of Age IT, more information was on their organisation website.

> "The Centre is grateful for the unstinting efforts and commitment of its volunteers…Volunteers gave approximately 3,060 hours during the year. In financial terms their contribution is conservatively valued at £22,950 per annum."
>
> (2010 report, EL Centre)

> "The Centre is grateful for the unstinting efforts and commitment of its volunteers…"
>
> (2009 report, EL Centre)

> "The Centre is grateful for the unstinting efforts and commitment of its volunteers…"
>
> (2008 report, EL Centre)

> "The [abbreviation of the TSO] is grateful for the unstinting efforts and commitment of its volunteers…who gifted over 10,000 hours their time during the year… amounts to over £70,000 per annum."
>
> (2007 report, EL Centre)

On all the TSO websites, detailed role descriptions and real case studies published to offer a better understanding of what the work was about, the benefit of volunteering with the TSO and the potential impact to the client, the community and society. These approaches were considered to convey TSO 'promises' to potential volunteers, 'external factors' in making the VPC.

### 5.2.2 Selection of the VC: Who fits in the role?

The data revealed that all the CEOs were responsible for recruiting their VCs, and had different criteria in selecting someone they perceived as *suitable*. It was interesting to observe that not all of them looked for relevant VM experience; in fact, only the project manager at EC Support was recruited for her VM experience and people management skills. Some CEOs emphasised candidates' professional knowledge relevant to the TSO core activities (projects); or previous experience in project management and interpersonal skills. There was a mixed view on the importance of these skills and knowledge. For example, the CEO at Age IT appointed someone who had previously worked as the external volunteer recruiter for the project. With this prior acquaintance, the CEO offered the person the project manager position when there was funding to cover the employment cost.

The term 'VC' (volunteer coordinator) indicates the job function, i.e. volunteer coordination/management. The findings showed that the VCs' responsibilities varied from one TSO to another, depending on the type of activities requiring volunteers, along with the financial capacity to cover the VC remuneration. In these three (small to medium size) TSOs, the VCs were primarily project managers. They carried out a project/programme management role and were also responsible for their own volunteer workforce. However, the volunteer manager at EL Centre was responsible for the volunteers (in café and retail shop) in addition to the [Ca(i)re] project she managed (see VC profiles in appendix 10). Details on the VC roles and responsibilities and the influence on their VM implementation are provided in chapter Seven.

The findings indicated that each CEO had different expectations as to suitable VCs. From the perspectives of making and fulfilling VC psychological contracts, the CEOs designed the VC role, responsibilities, and remuneration package accordingly; these were regarded as the 'promises' the CEOs made to attract suitable people to the VC role. Reciprocally, the CEOs expected the VCs to carry out the work required to achieve successful outcomes in managing volunteers. The relationship between the CEOs and the VCs was bound by employment contract terms and conditions, as well as the CEO expectations. Consequently, the CEOs influenced the VCs' working approaches.

> "…one of the things that we did was (to) send [the volunteer manager] on a volunteering management training course, so she's actually a qualified volunteer manager."
>
> (CEO, EL Centre)

> "…for me, a lot of it is about interpersonal skills. Most of the rest they [the VCs] can learn, so I was looking for, I hope they were going to be able to inspire a bunch of volunteers."
>
> (CEO, EC Support)

The activity of recruiting the VCs was not discussed in much detail by the CEOs during the study. But the findings did show that all of the CEOs offered their VCs autonomy in carrying out their work. Some VCs also helped to set up/improve VM policies and practices. For example, the volunteer manager at EL Centre (a new post) was responsible for assisting the CEO to set up standardised VM policies and practices to 'centralise' all VM-related activities. Also the befriending project manager at EC Support was responsible for reviewing VM practices to improve VM implementation.

### 5.2.3 Section summary

In summary, this section explores the VM planning activities across the three TSOs. Along with the organisational information provided in chapter Four, all of the information (TSO mission and objectives, core activities and VM planning activities) was regarded as *external* messages, used to attract more people to join the TSOs as

volunteers. The study focussed more on how the 'promises' were made and by whom, not on what the 'promises' consisted of, as explicit details could vary from one TSO to another. VM planning activities were carried out by the CEOs. The nature of VM (reviewed in Chapter One) meant it was highly flexible as there was little legal framework and guidance to follow in setting up VM policies and practices. Therefore, the CEOs played an influential role affected by how they perceived the volunteer contribution and the need for VM. In addition, the findings revealed that the CEO's perception also shaped what the intended VM should be. The following section looks at this.

## 5.3 Influence of CEO work motives, beliefs and approaches to work

### 5.3.1 Overview

The review of the third sector (in Chapter One) indicated the difficulties of managing a TSO. This was also supported by the data in this study. The three CEOs all undertook diverse responsibilities, even beyond the role of a CEO. This was due to the limited financial capacity in the three TSOs. Furthermore, their work motives, beliefs and management styles influenced how they carried out VM planning activities (as discussed in section 1.3.2). These aspects also indicated the extent to which the CEOs perceived their volunteers as (strategically) important resources (as claimed in section 2.3). Data analysis revealed that the CEO's demographic backgrounds shaped their values and beliefs of working for the sector, as well as how they perceived the volunteer contribution and the need for VM. The findings showed that the three CEOs joined the sector with different motives, which also affected how they carried out the role of CEO.

Evidence showed that the CEOs applied different management styles, influenced by their previous work experience. This was reflected in how they managed their TSOs, hence the difference in VM planning. As previously mentioned, one indication of style was whether they established formal or informal VM, as discussed in section 5.2.1. Although the information was perceived differently by the volunteers, it was generally regarded as 'necessary' and 'useful' to ensure that volunteers could carry out their work efficiently to achieve reciprocal benefits (detailed account of

volunteers' views on VM policies and practices is provided in Chapter Six). A further aspect in which the CEOs were influential was how the VCs carried out their work, hence the outcome of VM implementation (see detailed analysis in Chapter Seven). The following two sections elaborate the analysis to show the CEO's diverse responsibilities and the challenges they faced due to the financial constraint, and the influence of diverse CEO styles.

**5.3.2 Diverse CEO responsibilities– managing a TSO with limited resources**

The data indicated that two broad types of tasks were involved in running a TSO, governance and management. All of the CEOs took on board the management task at organisational and local level, and their influence on the governance side varied depending on their working relationship with the board of trustees. In two TSOs (EC Support and EL Centre), a management hierarchy meant they were not directly responsible for management of the volunteer workforce.

> "…management is more to mine [responsibility]. So I did a lot to change the management structure, we had to restructure, people were redundant and had to come up with new ideas and concentrated on what we were doing well, and get rid of things we weren't doing so well."
>
> (CEO, EC Support)

> "I have responsibility for the operational management of the Centre and also working with the Board in terms of governance; so operational management of the different activities in the Centre through a really good quality senior management team."
>
> (CEO, EL Centre)

TSOs often have unstable financial resources which in turn affect the stability of their workforce (refer to Chapter One); and the issue was also found in this study. All of the CEOs reported that they often faced the challenge of securing sufficient funds to sustain TSO operations. Age IT's CEO was under most pressure in this respect, because it had fewer funding sources than the other two TSOs (as shown in table 4.1 in Chapter Four). As a result, its CEO was also responsible for managing the IT class volunteers (acting as a VC). Thus, data analysis showed that securing funding was a

main CEO task. All the CEOs perceived it to be challenging, particularly with respect to writing funding applications.

In making 'promises' to attract volunteers, the CEOs had to consider the finance available for running volunteer-involved projects. This in turn influenced potential VM, such as the possibility of hiring a VC, or the extent and the complexity of policies and practices. As shown in table 3.4, the TSO's financial constraint was also found to influence the level of documentation, although it was not the only influential factor. Age IT had the most unstable financial resource out of the three, hence fewer VM documents in place.

All the CEOs reported that they had to plan the projects subject to funding; they also remarked on the amount of time and effort required to prepare a funding application, no matter how small the amount to be won. The pressures of dealing with funding were found to take the CEOs' focus away from other work such as networking and managing people; they perceived this to be 'frustrating'. The CEOs claimed that such 'frustration' was because they had to deal with diverse requirements from different funders.

> "Funding is tight; actually we do get a certain amount of external funding from trust and big charities. you don't know whether or not we are gonna get it the next year, that's the worry, all of this is one year funding, you get your cheque and cash in, you go 'thank you very much', and 12 months later hope they will send you another cheque. Sometimes they do, sometimes they don't. I think a colleague once told me, who runs a charity, the biggest frustration she ever had is dealing with funders' endless scrubby on how to run a charity. They [funders] haven't got a clue most of them, we're very lucky with the big funder of the befriending project when we started, we had 3 years' funding from a foundation who left us alone, and I've never come across [funder] like that. I had to do more paperwork for a £2,000 grant for some laptops than I had to do for a £400,000 one, it drives me potty. I can't believe the amount of paperwork I had to do"
>
> (CEO, EC Support)

> "Well, funding is always a challenge. That has always been, was the same…when I came here there was £100,000 deficit and everybody was worried about money. We're now running as a very successful Centre, in my 18th year, and everybody is still worried about money!"

"…some funding applications could be 2 pages of an A4, other applications could run to 30 pages. And that could be for £5,000, £500, £20,000. You know, it doesn't mean to say that the more money you're asking for the longer the piece of paper you have to fill in, it doesn't always follow that. So, yes, a fair amount of my time, I'm just trying to work out in my head as I'm speaking to you how much time I spend fundraising. There's an awful lot of administration I have to do… my staff and volunteers have long argued that I need an administrator. But of course we haven't got money for that, so I have to do that."

(CEO, Age IT)

The findings with respect to CEO responsibilities recognised the challenges they faced as the leaders of their TSOs. The level of difficulties would also seem to be particularly high in small to medium TSOs like those studied. From a strategic planning perspective, the increased task load forced the CEOs to constantly focus on responding to specific problems or reacting to emergent situations. These kept CEOs occupied most of the time, and thus left them little time to proactively plan ahead for their TSO's long term development.

"…any one day is different. I mean I couldn't say to you 'tomorrow morning between 10 and 12 I will do a funding application, 12 'til 2 I'll do administration...' You just turn up and see what happens with the day and you just fit in as much as possible."

(CEO, Age IT)

It was difficult for the three TSOs to overcome this situation, as the influence came from outside the TSO; but the study finding on the influence of CEO working styles revealed that CEO perceptions of their work could actually have still more impact on TSO performance, even have a long term benefit.

### 5.3.3 The impact of CEO work focus on VM
### 5.3.3.1 Diverse CEO work focus

Interview data analysis showed that the three CEOs did not equally divide their time to balance their diverse responsibilities, and had different focus in terms of carrying out their work. Although they all affirmed the importance of the volunteer workforce

(as revealed in section 5.1), each CEO viewed differently their volunteers'
contribution to sustain the TSO performance. They gave different weight to the value
of human resource, and thus developed a different work focus.

Due to the financial constraints, all the CEOs perceived their TSO's survival to be
crucial. Therefore, their work focus was supposedly on how to sustain the TSO
performance in a long run. The interviews with the three CEOs implied this main
task, but their actual work focus varied. Such variation also reflected the different
levels of TSO human and financial resources.

> "I suppose my basic belief is divided by looking after people and money, by
> and large [EC Support] will run by itself, if I've got the right staff and I've
> given them the resources. And certainly with the organisations probably have
> the right policies and so on. [EC Support] was actually run itself with me
> keeping a hopefully a biennial gander on what's going on, and that's how I
> would like to run the organisation, that leaves me time to do my job which is
> to try to help get more money and to do some of the research and the
> campaign."
>
> (CEO, EC Support)

> "I should be out in the community more, talking to people and networking
> and going to conferences. I do less of that, only because I've got more on in
> the administration side and the fundraising side… 75% of my time is
> administration, funding, papers [paperwork]…"
>
> (CEO, Age IT)

> "When I came, the Centre was in a transition phase from a period of
> development which was started by volunteers. And it was being
> professionalised by the introduction of staff and I was one of the first staff
> members to be employed here… over the years, in order to comply with
> regulation, staffing has had to be introduced… But we recognise that a Centre
> like this can't just be run by staff, because staffing costs are pretty high… So
> that I would say, the key issue is <u>always funding</u>."
>
> (CEO, EL Centre)

Although not directly linked to the making of the VPC, the CEOs' different views
and working styles influenced what 'promises' were made to potential volunteers and
how the policies and practices were implemented by the VCs.

### 5.3.3.2 Influence on VM

In each TSO, the CEOs influence caused different details to be included in the VM policies and practices. Broadly speaking, the main difference was the level of formal and detailed documentation as shown in table 3.4, VM at EC Support and EL Centre was more formally established, and they provided detailed information as guidelines. This was seen to help the VC and individual volunteers to understand one another's expectations. In the VPC context, any information presented by the TSO was used by volunteers to check how well they were supported by the organisation as promised, and was used by the organisation to assess if volunteers carried out their work as required. Thus, these VM documents offered a set of standards to ensure that both contract makers (the TSO and individual volunteer) kept their promises, hence fulfilling their VPC. Detailed descriptions of what volunteers were expected to do were also found to help with role and responsibility clarification.

However, analysis of the above aspect did not support an argument that effective implementation outcomes associated closely with the level of formality in VM policies and practices. This will be discussed further in Chapter Seven, but overall findings revealed that rigidity in implementing formal policies and practices was likely to "put volunteers off", developing negative views on formal VM policies and practices (the point is elaborated in Chapter Six). Consequently, a flexible implementation approach was encouraged (EC Support). The findings did support the efficacy of a flexible approach to implementing formal VM policies and practices, particularly as shown in how the VCs carried out VM implementation. Detailed analysis on the VCs is in chapter Seven.

### 5.3.4 Diverse CEO styles - influenced by individual value, beliefs and demographic

Data from studying the CEOs suggested diverse leadership and management approaches among them. Such diversity reflected the CEOs' different demographic backgrounds such as professional & educational experience, personal life experience and even volunteering experience. These formed and shaped their values, and their views towards the sector and its mission and objectives, all of which influenced how they carried out their role as a CEO within a TSO. Consequently, their perceptions of

the volunteer contribution and the need for VM influenced how they conducted VM planning activities (set up the policies and practices). In the VPC stage of making 'promises', such influence shaped how the 'promises' were made.

### 5.3.4.1 Influence of CEO demographic backgrounds

All three CEOs had previously had managerial responsibilities, but their experience was gained in different sectors i.e. public, private and the third sectors. Together with their diverse demographic backgrounds and various volunteering experiences, the three CEOs developed different images of TSOs and volunteerism, and thus applied different management styles. These ranged from 'highly controlled approach' (Age IT CEO), 'standardised organisational structure' (EL Centre CEO), to 'the organisation runs by itself' (EC Support CEO). The findings further showed that the CEOs had different motives for joining the sector: long term career pathway (EL Centre CEO), interest in the sector through volunteering (EC Support) and changes in personal/family situation (Age IT CEO). The concept of CEO motives resembles the volunteering motives in its nature and thus affects how the work was carried out by individuals. These could be viewed as 'predisposing factors' in the CEO psychological contracts.

> "I was an engineer of Royal Navy [before 2000], so it was public sector before I came to, in public sector for 20 something years before I came to the 3rd sector.
> …
> I volunteered myself as an instructor with the Sea Cadets which is a national youth charity, some years ago
> …
> So before coming into [EC Support], I had quite a lot of experience of volunteering I suppose from both sides, both as a volunteer and paid staff, and then I have been in [EC Support] since early 2005.
> …
> I enjoyed the work I was doing at the Sea Cadets, and I got more involved in that, as well as the work with young people which I found it was very valuable."
>
> (CEO, EC Support)

> "After 7 years there I was running the biggest women's department, in charge of a turnover of about £2 million, at the age of 24.
> …

So I left London, I decided to move to Oxford – wasn't sure what I was going to do, but I obviously needed to earn some money. So I decided that a friend and I were going to set up a small outside catering company."

…

My father had died 3 years previous and I felt that I wanted to give something back to the community for the help he'd had in his life and his illness. But then [my] mum got sick, so I went home to look after her – I was unemployed, didn't know what I wanted to do –. Unfortunately she had terminal cancer, so within 9 weeks she was dead. But during that time I worked very closely with nurses, a lot of community support and community caring. By that stage I came back to Edinburgh and I thought 'I want to put something, definitely want to put something back into the community'."

<div align="right">(CEO, Age IT)</div>

"I've been involved in management since my early 20s – originally in retail management, but latterly, from the late 70s, I've been involved in what is now called 'the third sector'.

…

So for over 40 years I've been working for organisations that use volunteers. The main part of that work would have been with the Salvation Army, then the Church of Scotland and now with the Centre. With the Church of Scotland I was involved in residential care but running alongside that I was doing student counselling, and then I came here to the Eric Liddell Centre as Community Projects Manager and, latterly, as CEO."

<div align="right">(CEO, EL Centre)</div>

### 5.3.4.2 CEO perceived value of volunteer and volunteering

All of the CEOs reported that they valued the volunteer contribution, but their interpretations of this contribution varied. This was due to their different understandings of the nature of volunteerism and its motives. The two CEOs at EC Support and EL Centre had volunteering experience in the past and thus had stronger views of what volunteering encompasses. They also had observed the changes in volunteer demographics over the years, and acknowledged a more diverse volunteer behaviour at present. This implied that TSOs could no longer manage volunteers as before, and supported the claim of the need for (strategically) managing the volunteer workforce (refer to section 1.3).

"We benefited from what I would call the 'twinset and pearls brigade' which were women who had been able to take early retirement or had never been needed to work, who committed themselves long-term in terms of volunteering in the Centre. There is a different type of volunteering going on

now, because increasingly it's younger people who are looking for inspiration on their CVs, it could be business people who have been involved in pretty stressful work for years."

<div align="right">(CEO, EL Centre)</div>

"The variety [type of people volunteering] is amazing, and that is good, and I think there is variety in people wanting to do befrienders, but thing that binds them all together is enthusiasm…what you can't do is to assume those volunteers are gonna be with you forever. You got to acknowledge there will be a change over, that some people will come and some people will go, and it's a fluctuating group."

<div align="right">(CEO, EC Support)</div>

In addition, the CEOs recognised the value of volunteers in a reciprocal sense as volunteering was perceived to benefit both organisation and individual.

"…not only about older people using technology, but about the value of volunteers and volunteering. It's about the value of volunteering and bringing people on, increasing their skills and their capacity…"

<div align="right">(CEO, Age IT)</div>

How the CEOs perceived the value of volunteers and volunteering seemed to lead to their decisions on adopting policies and practices. But the precise attitude of a CEO was not always clear from the policy documents (formal and informal) alone. Different rationales were found through analysing CEO's interviews, including setting up a formal VM structure in response to the 'messy' and 'decentralised' volunteer management situation (EL Centre), offering a structure to better facilitate the work (EC Support) and fulfilling legal requirement (Age IT).

But one of the problems that we had was that somebody would come into the Centre and say 'Oh, I want to volunteer'. And it was kind of being left to the receptionist, so we decided that it would be better to centralise all of that. And in among all of that, people could get lost, so people would be phoning up and saying 'I volunteered and I've not heard anything' and nobody could find the paperwork or anything like that. It was just mess, it really was messy."

<div align="right">(CEO, EL Centre)</div>

"I think there was a time when things were too flexible. I think at Sea Cadets, in a way, you knew that 30, 40 or 50 kids were going to turn up on a Tuesday

evening, but you weren't sure how many volunteers were going to turn up looking after them (chuckling) that could be a nightmare, because there were only 2 of you, you didn't meet any of the regulations for doing any of activities you wanted to do… "…you got to have the guidelines to protect the individuals as well as the organisations… you got to have things written down…"

<div align="right">(CEO, EC Support)</div>

"[Regarding policies] they're just there! They're there because you obviously have to have them. I mean and some of it is legally, you know, you have to have them."

<div align="right">(CEO, Age IT)</div>

These findings, from another angle, indicated the three CEOs' different management approaches; for example, the CEO at EC Support preferred the organisation to "run itself" by delegating tasks out to others and giving them autonomy. None of the CEOs mentioned the term 'strategic' in connection with managing volunteers, but there was implication that the CEO at EC Support perceived volunteers to be crucial for the TSO, suggesting a strong sense of placing people at the centre of operation (reflecting the argument by Boxall, 1992; see section 2.2 and 2.3 in Chapter Two).

"…there was a very wise man who I worked with many years ago … and he said "you look after the people, and the people will look after the machine". Within hind sight, I can see how wise it was, actually I probably wouldn't be very good at running a befriending project, but I've got the right people to do that, I mean we all need help and guidance, but actually if you put the right people [in the right position], you give them the resource and you give them the support … you're there to help… in my experience, 99% people who are given the responsibilities actually get on with it. And that's way I'd like to run it… [EC Support] was actually run itself with me keeping a hopefully a biennial gender on what's going on, and that's how I would like to run the organisation, that leaves me time to do my job."

<div align="right">(CEO, EC Support)</div>

Almost opposite to this view, the CEO of Age IT took more control and thus felt overloaded. This management style possibly resulted in more workload, and took her away from her other CEO responsibilities (refer to the quote in page 143). It was interesting to observe that she positioned herself to be the core of Age IT operation

showing a strong indication of possession/control, the expressions such as "hand-picked my board" and "our approach is my approach".

> "So I hand-picked my board – I knew I needed a good chairman, who I knew, who's a lawyer. Other members of the board, from community education, health and social care, finance – I needed a good chap with figures and that sort of thing. I mean I'm good with my figures, management skills, but you need all these.
> …
> Well, finding the premises, talking to lawyers, talking to surveyors. I mean I'm not a fully qualified lawyer and surveyor, I'm…Because I started [the organisation], it's always been me. And although I've got lots of support from the staff and the volunteers here, and my board of directors are all good and supportive, but sometimes – a lot of the time actually – it comes back down to me and it sits on my desk for any things that have to be done."
>
> <div align="right">(CEO, Age IT)</div>

Compared to those two CEOs, the CEO at EL Centre managed the TSO in a much more formal manner, in terms of stressing the need for the sector 'professionalization'. This emphasis was reflected in its greater organisational hierarchy (refer to the TSO profile in Chapter Four). The CEO perceived such a formal structure to be the transition to professionalization, thus managed the Centre by maintaining the hierarchy most of the time.

> "When I came, the Centre was in a transition phase from a period of development which was started by volunteers.  And it was being professionalised by the introduction of staff … in order to comply with regulation, staffing has had to be introduced…
> …
> One of the things that we do is that we have a senior team meeting twice a month and issues around volunteering can all be raised and discussed, and then we'll have sub-management groups.  So that when we were setting up the café, [the volunteer manager] was involved.  Now you would think why would [she] be involved in that..."
>
> <div align="right">(CEO, EL Centre)</div>

## 5.4 Chapter summary and conclusion

The findings have shown that not all the CEOs perceived their volunteer workforce as strategically important. The intended VM varied across the three TSOs: meeting external requirements (Age IT), standardising the management of volunteers (EL

Centre), and protecting and supporting (befriending) volunteers (EC Support). Not only did these intentions affect detailed VM practices, they also influenced the recruitment and selection of the VCs. This has indicated the possible contribution of VM to TSO performance, particularly as regards their volunteer-involved projects. However, the data suggested that performance could be further affected by the way VM was actually implemented, because the volunteers and the VCs also had an impact on the actual VM outcomes: the volunteers affected the outcome of the VPC making and fulfilment; the VCs influenced the fulfilment of volunteering motives and expectations through facilitating and shaping the VPC fulfilment.

Several aspects were found to have a bearing on the CEOs' work beliefs, motives, perceptions of volunteerism, and the need for VM and management styles. These in turn affected the intended VM. VM content was considered to be messages ('promises') to attract potential suitable volunteers, regarded as 'external factors' influencing the making of the VPC. As the VPC was made at individual level, the TSO was only able to manipulate individuals' decision-making on accepting the 'promises' hence forming the VPC through interpreting the given information. The information was thus important for the TSO to ensure the VPC was made.

Analysis of this chapter revealed how and why the TSO 'promises' were made to attract suitable volunteers. This chapter laid out a foundation at the organisational level, and facilitated explorations at a later stage: the making and fulfilling VPC at individual level, and the impact of actual VM implementation. The following chapter (Chapter Six) now moves to look at the next two VPC stages of 'acceptance' and 'reliance'. The analysis is organised to show the influence of individual volunteering motives and expectations. Chapter Seven focusses more on the outcomes of the VM implementation, as influenced by VC views and management styles.

# CHAPTER SIX: Volunteer perspectives on VPC making and fulfilment

## 6.1 Chapter Overview

Box 6.0 Overview of chapter key analytical points

---

**Reaching 'acceptance'**

. The internal process

. Influence of others on forming 'beliefs' – 'social cue'

. Influence of predisposing factors on volunteering motives and expectations

- developing desires for specific volunteering roles

. Influence of VM policies and practices on 'acceptance'


**VPC fulfilment at individual level – 'Relying' on realising 'beliefs'**

. Factors affecting how volunteers perceive the fulfilment of the VPC

- impact of realising VPC terms (transactional and relational)

- relaxed and friendly working environment

- role clarification

- pride in the volunteering roles

- open communication

. Volunteer contribution to TSO – impact of VPC fulfilment

---

The analysis of this chapter focusses on the three stages of making and fulfilling the individual VPC, through the lenses of the volunteers (the first stage is making 'promises', covered in Chapter Five). The analysis starts by describing the second stage  of reaching 'acceptance' through unfolding the 'internal process' of individuals interpreting external information and forming their 'beliefs'. Factors influencing the 'acceptance' are also explored in this part. Then, the analysis moves to understand how the volunteers perceived the VPC fulfilment, before considering the impact of the VPC fulfilment on volunteer engagement and retention. As the VPC fulfilment is realised at individual level, the terms 'individual(s)' and 'volunteer(s)' are used as equivalents in this chapter.

## 6.2 Reaching 'acceptance'

### 6.2.1 Overview of the 'acceptance' – unfolding the individual internal process

The data analysis suggested that the 'acceptance' of the VPC largely depended on how each individual perceived the benefit of entering the volunteer role. The stage of 'acceptance' includes the internal process of interpreting and 'accepting' the TSO 'promises' (Chapter Five) and then forming 'beliefs'. The internal process (see section 2.6) consists of two major steps: 'encoding' and 'decoding'. Two factors influenced the outcome of the internal process: 'predisposition' (the volunteer perception of volunteering) and 'social cues' (influence of others' experience and views on volunteering). The findings showed that the 'acceptance' of the VPC did not depend on forming any *explicit* agreement between the two contract makers; thus, to understand individual volunteers' motives and expectations (discussed in section 2.4), TSOs must understand how individual volunteers make decisions on 'accepting' TSO 'promises'. Figure 2.3 presents the internal process in detail including its relationship with the other two stages of making and fulfilling the VPC. Informed by the data analysis result, figure 6.1 below was extracted from figure 2.3. Factors in the circle indicate the individual internal process, 'social cues' displayed in the rectangle represent external factors which influenced volunteers' internal processing outcomes. These external factors mainly refer to other relevant people's views (volunteers, clients, TSO employees) on volunteering at the TSO. The 'predispositions' consist of a range of internal factors including cultural difference, personality traits, educational level, previous work experience and influence from other life experience. All these factors, to various extents, had an impact on the 'acceptance' of the VPC. Consequently, the original blanket term 'predisposition' was unable to capture the true multiplicity in this context.

The predisposing factors listed in figure 6.1 influenced how an individual assumed the desired identity on entering volunteering work; such a desire guided the individual to seek suitable volunteering work (reflecting reviews in sections 1.3.1.2 and 1.3.1.3). The outcome of the internal process was 'beliefs' as to what the individual expected to receive from the TSO on delivering the required work. The 'beliefs' also included a view that individual volunteering motives and expectations

would be met if their TSOs believed that they have carried out required volunteering work. Once this stage was reached, a VPC was made.

Figure 6.1 reproduction of the internal process in the stage of 'acceptance'
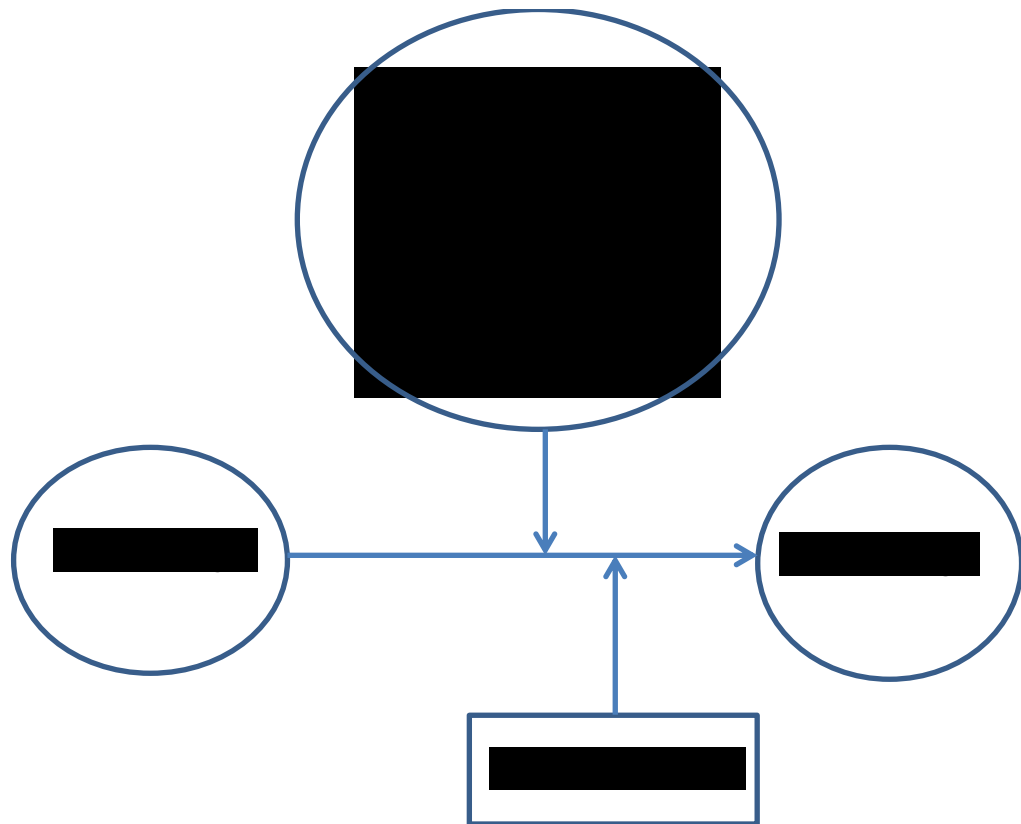


Developed based on Rousseau (1995), 33

The findings showed that majority of the volunteers 'accepted' their VPC based on their interests in the volunteering role (11 out of 16 volunteers); two volunteers chose their volunteering role due to a particular interest in the client group; two other volunteers accepted the role because of overall interest in the TSO; while the remaining volunteer started volunteering for a general intention of 'giving back to the society' (see table 6.1 below). The next part of this section starts by analysing the influence of 'social cues', then moves to understanding the influence of the predisposing factors and the VM policies and practices.

Table 6.1 List of information sources and volunteer motives

| Volunteer (profile codes) | Information sources | Volunteering motives |
|---|---|---|
| AI1 | Friend recommendation | Role driven - IT professional background |
| AI2 | Advertisement at library | Role driven - Personal interest in IT technology |
| AI3 | Family member recommendation | Role driven – suit personal development needs |
| AI4 | Advertisement at library | Role driven – personal interest in IT aspect in the role |
| AI5 | Friend recommendation | Role driven – professional led interest in IT |
| EC1 | Online search for befriending volunteer opportunities | Role driven – suitable for personality |
| EC2 | Volunteer Centre Edinburgh (VCE) | TSO awareness – previous client; interested in the role |
| EC3 | Edinburgh University Student Association (EUSA) website on volunteering advertising | Role driven – similar to her previous volunteering experience. Also the only TSO responded to her enquiry. |
| EC4 | Through VCE | Client group oriented – experience of looking after disabled people through personal life (wife) |
| EC5 | Through EUSA | General interest in volunteering – giving back to society |
| EC6 | Online search for volunteering with disabled people | Client group oriented – previous experience in working with disabled people |
| EL1 | Through onsite advertisement | General interest in volunteering - Build up new life routine to occupy some free time |
| EL2 | Applied directly at the Centre | TSO oriented – want to volunteer at the community centre |
| EL3 | Through VCE | Professional development driven - Preparation of starting new career |
| EL4 | Friend recommendation; ex-volunteer | Professional development driven – has experience of working at café, and intend to work at café paid in future |
| EL5 | Through VCE | General interest in volunteering - Build up new life routine to occupy some free time |

Only two of the volunteers interviewed expressed their desires to join the TSO/help with the targeted client (EL2 and EC2). Thus, in this study the TSO reputation was not a main attraction.

### 6.2.2 Influence of others in forming 'beliefs' – 'social cue'

'Social cues' in the VPC context means others' perception of volunteering and the TSO. The data showed that 'social cues' had different impacts on the individual internal process of interpreting and understanding information to form 'beliefs'. The findings indicated two broad sources of 'social cue': an individual's social circle (such as friends and families who were connected to the TSO in different capacities), and the TSO employees (mainly VCs in this study). Friend referral was a commonly exercised recruitment approach across TSOs (as shown in table 6.1). Although not a formally established practice, it seemed to be naturally adopted by people. VCs as 'social cues' influenced the outcome of the internal process through implementing VM policies and practices (to be analysed in Chapter Seven).

The findings showed that 'social cues' from their social circles influenced how individuals obtained information about the work, and how they perceived the TSO. For example, does the TSO share their social values and beliefs? Evidence indicated that the 'social cue' facilitated individuals to have a specific preference for a particular type of TSO, or for specific volunteering work. Individuals with a pre-determined preference, although rare in this study, were attracted to a specific TSO, and thus exhibited more willingness to accept any work offered. For example, the shop volunteer from EL Centre (EL2) expressed her preference for volunteering in a community centre. She claimed that EL Centre was the only place she wanted to volunteer with; therefore, she applied to become a volunteer there without specifying what work she wanted.

> "I wanted to work in a Centre, rather than in a shop, because well one of the reasons, I recently found out, a friend said that they worked in, and she said that the managers, who are paid employees, and then it's staffed by volunteers. She said that they're on a target of earning I thought, 'well I'm glad I'm not in that situation'. Because even as a volunteer I wouldn't like it,

because to me that sounds as if it's big business, you know, trying to maximise profit."

<div align="right">(Shop volunteers EL2, EL Centre)</div>

Most of the studied volunteers claimed they became aware of the work through their friends and family. Others' positive volunteering experience further encouraged the volunteering decision. But the data analysis also indicated the 'social cues' mainly confirmed the individual desire of volunteering and turned the desire into action; little evidence in this study suggested 'social cues' made impact on someone who had no desire of volunteering.

"I have a friend who goes to the church and she told me about it [volunteer position at EL Centre]. She used to work in the café with me [at the Centre] and we decided to go along and we got it."

<div align="right">(Café volunteer EL4, EL Centre)</div>

"I heard about it through…my ex-sister-in-law…she was obviously happy there and was getting a lot from it and I'd spoken about the possibility of getting somewhere where I could get experience of working with computing with people."

<div align="right">(Class volunteer AI3, Age IT)</div>

Therefore, the findings of this study showed that while the 'social cues' did have an impact on individual decision of volunteering, such influence was still subject to the individual's own desire of volunteering. How individuals reacted to the influence of 'social cues' reflected how strong their volunteering desires were; the 'predisposing factors' thus were primary in developing volunteering motives and expectations.

### 6.2.3 Influence of the predisposing factors in volunteering motives and expectations

### 6.2.3.1 Overview of the influence

The findings suggested that predisposing factors (as shown in figure 6.1) substantially influenced the forming of 'beliefs' hence the making of the VPC. Links between volunteer demographic profiles and volunteering motives and expectations were found in this study (see volunteer profiles in appendix 8). The establishment of this link was facilitated by the desire to form or maintain an

identity realised by volunteering. Volunteering was not the only commitment for all of the volunteers: they had other current commitments, so these identities together with volunteering reflected the 'core self' of the individuals (as outlined in the review in section 1.3.1). However, further analysis of data pertaining to the impact of the VPC fulfilment (section 6.3 and Chapter Seven) indicated that the influence of predisposing factors had a significant impact on making and fulfilling VPC at the start of work. Nonetheless, data analysis also showed that these 'primary' volunteering desires could be shaped and the VPC could be re-made by effective VM implementation. Thus the impact of the fulfilment could be shifted from an individual level ('volunteerism') to an organisational level ('voluntarism') to the benefit of the TSO performance (supporting the main findings of understanding the VPC). Detailed analysis is provided in later in the chapter.

Studying the 'primary' volunteering desires showed that motives and expectations were diverse, leading to different preferences/desires in volunteering roles. Their nature also influenced how the volunteers perceived and interpreted the TSO 'promises' hence forming 'beliefs' (referred to table 6.1). In this study, the different desires influenced the individuals' volunteering commitment, and also were reflected in the fulfilment of their VPCs (in section 6.3). Most volunteers had specific motives and expectations on entering work: 1) maintaining volunteering identity by expanding volunteering involvement, 2) desire for career and/or personal development, 3) desire for adjustment to a new life (e.g. retirement), and 4) intention to bring changes to life (echoing the review in section 1.3). The next sub section (6.2.3.2) provides elaborations of these four different 'primary' motives and expectations.

### 6.2.3.2 Influence of 'primary' volunteering desires
### 1) Maintaining volunteering identity by expanding volunteering involvement
In this study, some interview data showed that volunteering has become integrated in the individuals' lives. Some started volunteering at their early years influenced by families (e.g. Project volunteer AI2) and/or their interest

extended from their professional experience (e.g. IT Class volunteer AI5; Befriending volunteer EC6). So they had university degree(s) and/or came from a professional background (see Appendix 9). Therefore, their volunteering motives and expectations to a large extent came from a desire to use their knowledge and skills; and also from an intention of self-development.

> "I come from … that age you volunteered and my mother volunteered and we all… I've got 3 sisters and we all do voluntary work. … So [I volunteered with] Brownies and Guides [when I was young], you had to go and help an old lady dig the garden or you had to, for various badges you had to do volunteering and through the church or… Just the family culture was that."
>
> (Project Volunteer AI2, Age IT)

> "…with regards volunteering, the first kind of thing that I ever really did, I suppose, was I worked in Dallas, in America, and I volunteered for something called 'Taping and Radio for the Blind', and what I would do was read books on tape.
> …
> "In 1999, New Year's Eve, I went to Uganda…. it cost me $2000 just to fly there, plus I had to buy extra equipment and stuff, but the rewards were just amazing"
>
> (IT Class Volunteer AI5, Age IT)

> "I haven't actually done any formal volunteering, although I have been professionally, involved in it [as a VC]. And I moved to Scotland and time commitment has changed, and I wanted to see volunteering from the other side, so I have been volunteering with TCV, which is Trust Conservation Volunteers, MSC – Marine Conservation Volunteers, ECAS and Earth Calling a little bit which is an environment organisation supporting schools to get involved in education."
>
> (Befriending volunteer EC6, EC Support)

The findings showed that these volunteers generally preferred to have autonomy and flexibility in volunteering, as the evidence indicated that they wanted to 'give something (back) to the society'. Analysing interview data also suggested to some extent that the individual's expectations reflected her/his personal situation at the time of volunteering. This suggested that the changes at different life stages resulted in different volunteering desires, hence an altered preference for specific volunteering roles (as reviewed in sections 1.3.1.2 and 1.3.1.3).

> "So Brownies and Guides, you had to go and help an old lady dig the garden or you had to, for various badges you had to do volunteering and through the

church or… Just the family culture was that… in Sheffield I was a non-exec director on an organisation that helped people with severe learning disabilities to live in the community… I volunteer with [Age IT] on a Tuesday but last year I was volunteering in a school doing counselling with kids - because it's my background."

<div align="right">(Project volunteer AI2, Age IT)</div>

## 2) Desire for career or personal development

A need to grow towards a future career or personal development was another factor influencing the volunteering decision. These volunteers came from diverse backgrounds: job-seekers (part of the working population and intending to re-enter the job market), and those with certain disabilities restricting their job seeking (hoping to either enhance employability or just continue personal development).

"I go to church. … [volunteered] in the church and the EL Centre as well… I just wanted to work for the church because it was in a good environment and friendly staff … I think it was my mum actually said to me once, she said to me 'maybe you should try and get a paid job' but I couldn't get a paid job because I have learning disabilities and it was quite difficult for the paid jobs so I got this volunteer job. But they are friendly staff, I must admit! [I feel] confident as well [through volunteering]."

<div align="right">(Café volunteer EL4, EL Centre)</div>

"Yeah, this would be my first volunteer work. Because for quite a few years, I really didn't do much, then I decided I'd better do something and voluntary work is kind of the way forward."

<div align="right">(Befriending volunteer EC2, EC Support)</div>

For example, the building maintenance volunteer at EL Centre (EL3) has had long term involvement at board level with different TSOs in the past, alongside his full time commitment as a business owner and an architect. But his personal circumstances changed due to a long term illness. Upon recovery, he was preparing himself to back to employment, but now with the intention of doing building maintenance work. In order to meet his expectation of getting employment in his preferred job, his volunteering experience at the EL Centre was relevant to his future career choice (interview quotes 6.1 in appendices).

**3) Desire to set up a new life routine**

Evidence showed some volunteers hoping to establish a new routine due to a change in life such as (early) retirement or redundancy. This specifically pertained to those not in employment and not active in seeking employment. These individuals had a less strong desire to use their skills and knowledge or 'give back to the society', compared to the volunteers with the first two types of volunteering motives. They mainly used volunteering as a leverage to have a balanced and routinized life, and mostly had minimum level of commitment shown by merely delivering the arranged work, with little intention of getting more involved/engaged in the project/TSO (e.g. doing extra work regularly or taking more responsibility). The analysis of this part actually signalled that the VPC fulfilment for these people did not always benefit the TSO performance (the point raised in section 6.1).

> "A lot of it is just sort of to do with 'right, I've got lots of spare time now and…', and it is something for me to do on a regular basis. And volunteering is, I don't want to have a paid job but I quite like, I always enjoyed going out to work."
>
> (Café volunteer EL1, EL Centre)

> "I have 2 [clients] with ECAS … plus I help out at the hospital every Thursday… I enjoy that, obviously I am meeting different people all the time as well."
>
> (Befriending volunteer EC4, EC Support)

> "It [volunteering] gave me another focus. And it made me sort of think 'there's more to life than Standard Life' [previous employer]. Because I'd pretty much always worked there, you know, I used to work really hard and I did long hours and at weekends and all the rest of it."
>
> (IT class volunteer AI1, Age IT)

A further finding regarding this aspect was that some volunteers tried to plan their volunteering work around other commitments; in other words, they did not commit to the volunteering work as seriously as they would to paid work. For example, the volunteers did not always attend TSO organised events if they had other commitments.

> "…now [the VC] has little social gatherings and it's smaller numbers,

… Everyone doesn't go – I look in for about 5 minutes – you know, I'm never there the whole time."

<div align="right">(Project volunteer AI2, Age IT)</div>

"…not on a one-to-one with Julie, but yes they've had a couple of meetings on a Monday afternoon and I could go to the first one but I go to an art class on a Monday afternoons, so I didn't go to the last one."

<div align="right">(Café volunteer EL1, EL Centre)</div>

## 4) Desire to bring changes to life

In addition, the findings showed that the volunteers also tried to bring some changes into their lives. In this study, the volunteers with this desire had limited experience of doing regular work in an organisation; most of them left work a long time ago for different reasons. They also had little volunteering experience in the past.

"I am a full time mum, 3 children, and I haven't ever worked or gone back to work in an office capacity since I had my first child. I did want to go back and retrain and do different things, but circumstances wouldn't allow it, I had my second child and third, my husband works away from home … It has taken me quite a little bit of time to get used to being a full time mum, third time round, 8 years down the line, I am fine with it. But it's been quite sort of journey cause [I am also] wanting to do other things…"

<div align="right">(Befriending volunteer EC1, EC Support)</div>

"I was doing quite a lot of contract work, bits and pieces, so I was off at different times.  And I found that as I was getting older it was more and more difficult to get employment.  So I decided that perhaps I should start voluntary work so I looked around and this is my first volunteering experience."

<div align="right">(Charity shop volunteer EL2, EL Centre)</div>

These volunteers seemed to expect to receive support (VM) from the TSO; although such expectations were not explicit. The data analysis suggested that they longed for social connections, because their normal lives did not offer them enough such opportunities. Thus, they felt that volunteering would allow them to connect with others and have a sense of belonging.

"I certainly expected to be supported, and that was very clear from the outline again because the policies that they have, we would be fully trained up, which I suppose that's something I did expect, and obviously in place. There is nothing that surprised me,"

"I expected to see other volunteers, but not as many times, or in that kind of way."

(Befriending volunteer EC3, EC Support)

"I did understand there would be line [manager] if there is a problem, hoping anyway."

(Befriending volunteer EC4, EC Support)

The above analysis indicated that there were few universal/ standard benchmarks for the volunteers to form 'beliefs' and consequent 'acceptance' to enter the volunteering work, such as what terms they expected to have to 'accept' as part of the VPC. This was instead largely shaped by diverse individual volunteering motives and expectations. This further indicated that the VPC was made at individual level, so outcomes of interpreting TSO 'promises' varied from one volunteer to another. From the perspective of 'accepting' the VPC, different individual motives and expectations led to different 'beliefs' being formed through the internal process. Not all these 'beliefs' formed suggested expectations for VM. In fact, the findings indicated that 'beliefs' linked more to individual's expectations, i.e. what they expected to get out of volunteering. Therefore, the results showed little evidence of a connection between the making of the VPC to *enter* the work (i.e. enter the VOR) and volunteer engagement and retention in the TSO.

The findings related to making the VPC also showed a mixed volunteer perception of VM. On one hand, it added little value to sustaining volunteers and volunteering work, but at the same time it was helpful and 'nice to have'.

### 6.2.4 Perceived influence of VM policies and practices in 'acceptance'

Established VM policies and practices had impact on the VPC 'acceptance'. At this stage the main determinants were still volunteering motives & expectations and the roles and responsibilities. The mixed views on the need for VM mainly referred to its structure and its value to volunteer support. This sub-section provides elaborations of these two conflicting perceptions.

### a) VM made little difference

This view to a large extent pertained to volunteer recruitment and selection. Formal requirements such as completing an application form and providing references were perceived by some volunteers as unnecessary. In addition to expressing this view clearly during the interviews, there was also a sense of 'ignorance' shown through *not* discussing VM much during the interviews. This lack of awareness indicated that the VM policies and practices made little impact on an individual's 'acceptance' of the VPC (entering the work/VOR). This finding implied that individual still reached the 'acceptance' stage largely influenced by their predisposing factors (as shown in section 6.2.3). The 'makes little difference' perception was reflected during some of the interviews as either 'ignoring' the topic (e.g. volunteer AI5) or dislike of the 'boring' procedure (e.g. volunteer EL5 at Day Care Centre).

> "…lots of boring references you have to send off to friends and things…you have to give references and verify your past professional life."
>
> (Day Care Centre volunteer EL5, EL Centre)

In a different example, an IT class volunteer (AI5) exhibited a deep passion for engaging with the volunteering activity - helping children in Africa. It was interesting to see that his focus was heavily on his volunteering experience; his narratives of this were full of emotions, passions and interesting plots. Therefore, it was observed that his motives tended to be rooted in his preference for specific volunteering activities, while the VM structure mattered little to him. This made the selection of TSOs a secondary criterion. Similarly, he joined Age IT as an IT class volunteer because of his knowledge and interest in computer technology (see interview quotes 6.2 in appendices).

### b) VM was helpful and 'nice to have'

The second type of perception acknowledged the VM to be helpful, and VM policies and practices as mainly 'nice to have', but nevertheless the volunteers did not describe it as important during the interviews. This view highlighted

volunteerism as an activity that people do of their free wills, and thus require little from the TSO (as reviewed in section 1.3). However, these volunteers in this study perceived positively VM practices such as training sessions and social events, as these activities made them feel valued and appreciated. This analysis reflected the relational nature of the VPC. But these volunteers only had an implicit idea about the need for VM practices.

> "They do a lot of, you know, volunteer-focused days … they'd offer a lot. There was a first aid course, wheelchair aid course, like I've done the wheelchair aid one… a lot of support and whenever we need anything, like they are immediately there so that's really good."
> (Befriending volunteer EC5, EC Support)

> "Yes, I did understand there would be line [manager] there if there is a problem; so hoping anyway."
> (Befriending volunteer EC4, EC Support)

### 6.2.5 Section summary

The analysis of this section offered a detailed view of the VPC stage of 'acceptance': how individuals interpreted and understood the external information and formed 'beliefs' to make VPC. The individual internal process presented the unseen thinking, influenced by different volunteering desires (shaped by individual predisposing factors). As understood in this study, completing the VPC stage of 'acceptance' ended at the time when the individual accepted the volunteering offer made by the TSO. The next section then looks at the next stage, the perceived VPC fulfilment.

### 6.3 VPC fulfilment at individual level: 'Reliance' on the 'beliefs' and its impact on the TSO performance

#### 6.3.1 Overview of the VPC fulfilment

All of the volunteers in this study reported their positive experience, but from different aspects. A majority expressed their feelings towards the work experience; they used words and phrases such as 'enjoy', 'help me awful lot', 'happy' and 'nice'.

> "Certainly what I do at the moment I'm quite happy with. I enjoy [this] better. It's a nice atmosphere in here, I enjoy it."
> (Café volunteer EL1, EL Centre)

"They help me an awful lot [at EL Centre]."

(Café volunteer EL4, EL Centre)

The findings also indicated that the VPC fulfilment to a large extent corresponded to the volunteers' *primary* volunteering motives and expectations (as shown in the analysis of section 6.2). This showed that the volunteers perceived VPC fulfilment to be their ability to rely on the 'beliefs' they formed, with the fulfilment at individual level. As the 'beliefs' varied, the VPC fulfilment also differed between individuals.

The findings indicated that the completion of the three VPC stages depended largely on how the volunteers interpreted and processed the information about the voluntary work; but the results showed that the fulfilment was not realised at organisational level, that is to say, the VPC fulfilment did not necessarily directly contribute to engaging and retaining volunteers. Some volunteers in this study had little intention of increasing their work commitment or getting more involved with the organisation, despite feeling satisfied (the VPCs fulfilment) and being committed to their work.

"I have a certain role … on the café…I don't think I would want to fill up my life with volunteering.  So you would just go along, do the best you can do in your few hours and… I certainly wouldn't be in a position to start treading on toes and telling other people what to do.…I wouldn't like to be volunteering more."

(Café volunteer EL1, EL Centre)

The findings showed that all the volunteers viewed their VPC fulfilment differently. Their perception was based on: 1) honouring the agreed contract terms (transactional and relational), 2) working in a relaxed and friendly working environment, 3) clarifying the volunteering role and responsibilities, 4) feeling proud of the role participating, and 5) communicating openly with the VC and peers. The following sub section (6.3.2) provides detailed analysis of these five volunteer perceptions.

**6.3.2 Different volunteer perceptions of the VPC fulfilment**
**1) On honouring agreed contract terms (transactional and relational)**
Volunteering satisfaction was achieved partly through the agreed contract terms (both transactional and relational terms) being honoured. The transactional terms

found in the study referred to the volunteering work arrangement (such as structured shifts/session agreed between the parties) and reimbursement of work-related expenses. Most of the volunteers claimed that these terms (although they did not refer to them explicitly as 'terms') helped them carry out their work efficiently.

> "But one thing that's very positive about [this project], which doesn't happen with a lot of the other [volunteering work], is they try and make sure you're not out of pocket."
>
> (Project volunteer AI2, Age IT)

Relational terms provided by the TSOs in this study mainly referred to VM practices such as training and performance review (refer to analysis in section 5.2). Work related training was an important VM practice. All the TSOs reported they had initial training in place to help the volunteers undertake the work. The data revealed that initial training, despite the different training content, mainly aimed to ensure successful task completion. However, in the actual implementation the training was not arranged immediately on the recruitment of new volunteer(s). In this study, the training sessions were arranged a few times through the year (such as the befriending project at EC Support). Some new volunteers might have to wait before they could complete the training and start working. In this case, communication with the waiting volunteers was also important, as this could prevent these volunteers from withdrawing early.

> "[The manager] was pretty good actually…I think I probably got some correspondence with her. I mean I didn't really need to have sort of correspondence with her until the day of the training, there wasn't any need for her to, you know, I mean I knew the training was then and we had to wait till that initial stage before we could take it any further; but she [kept in touch with me over the waiting time]."
>
> (Befriending volunteer EC1, EC Support)

The measurement of how well relational terms were honoured relied more on the actual implementation of the relevant VM practices such as the effectiveness of conducting training and regular review meetings. The findings in this study supported the claim that the intended VM (formally established terms) could not make an impact on engaging and retaining the volunteer workforce (as reviewed in

sections 2.2 and 2.3). The findings in this study further suggested that mechanically implementing (relational) terms (which can be regarded as actual VM implementation) may not effectively engage and retain the volunteers in the TSO (details to be provided in Chapter Seven).

**2) On working in a relaxed and friendly environment**

Most of the volunteers regarded positive feelings as an indicator of good and supportive VM from their VCs. This was also considered to be a signpost of the VPC fulfilment. The findings in this respect indicated that the volunteers saw emotional elements to be important to their satisfaction. They preferred to volunteer in a relaxing working environment and did not want to get stressed over volunteering. This evidence suggested that volunteering work should not be carried out entirely in the same way as formal employment.

> "…to begin with I took it [volunteering] as a job. I was very diligent at work – turning up, doing this – so that's why I was horrified that other people weren't. And beforehand, it would almost be like a work-plan. So I was very rigorous – 'this is what I'm planning, this is what's going to happen'…on the way back [after volunteering work], we [my volunteer partner and I] would discuss what had happened and hadn't. and he said 'look, you know, you're volunteering'…When I was going down to Sheffield and back [to volunteer], that [not treating volunteering as a job] made easier."
>
> (Project volunteer AI2, Age IT)

The benefit of a good working relationship with peers was positively perceived by some volunteers in this study. They talked about their (good) relationships with their fellow volunteers at work, and they implied the importance of those directly and indirectly during the interviews.

> "It's the first thing you've got to do is make a relationship. And then after that you've got to get down to the formal. 'What about clarifying your role?'"
>
> (Project volunteer AI2, Age IT)

> "When I first started [at the shop] I did Tuesdays only, yes Tuesday afternoons, and I used to steam clean the clothes with a Spanish girl called Celia. So she used to practice her English on me! that was on a Monday afternoon I used to steam clean and then Tuesday afternoon I'd help to sell, but the Monday afternoon used to be really good fun because she would tell me what she had been doing in the week. And then she'd say 'Oh, what's

that word?  What does that mean?' and then just helping her with her English and just having a general conversation."

<div align="right">(Charity shop volunteer EL2, EL Centre)</div>

The relaxed and friendly working environment mentioned in this study referred to the 'soft' environment, that is to say, a type of working dynamic cultivated and maintained by the people involved. Having such a working environment also implied that the people relationships within TSOs (the VOR being one of them) were generally good. This contributed to the volunteer satisfaction; however, it was still not evidence to suggest that volunteer satisfaction lead to the volunteer engagement and retention. Therefore, the satisfaction gained in this aspect was seen as part of the VPC fulfilment, but only at individual level.

**3) On clarifying the roles and responsibilities**

In addition, some volunteers also mentioned that being clearly informed of their volunteering role and responsibilities helped them carry out the work smoothly. In this study, role clarification facilitated individual volunteers to 'correctly' interpret the type of work required by the TSO ('encoding'), and thus form an idea of how to carry out the work in a way closely matching the TSO expectation ('decoding'). The better the roles and responsibilities are clarified, the more relaxed volunteers should feel. Such clarifications demonstrated one of the VC's roles as the volunteer line manager in ensuring volunteers can carry out their work and perform to the expected level, (matching the review in section 2.5). Such a view also showed one of the volunteer's expectations of her/his TSO.  In this study, all the three TSOs managed to meet this volunteer expectation by providing clearly written information about the roles and responsibilities (in their volunteer agreement or the document about the role, see table 3.4).

Role clarity was also perceived by other volunteers in terms of effectively carrying out the work. Most of the volunteers described in details their roles and responsibilities; some of them compared their current role to their previous role in order to highlight the importance of working in an organised environment. Such reflection also highlighted the need for the TSO to provide clear instructions for the work, to protect the volunteer's well-being (that is to say, not feeling stressed in

doing the work). For example, one café volunteer at EL Centre (EL1) talked about why she withdrew from her previous volunteering work in a charity shop.

> "The girl that was in charge there … The shop was in a shambles and I just thought, I just wanted to get in there and tidy it up and sort things out, but that wasn't my job to do that and it wasn't my business to tell her how, as a manager, she should be running her shop.
> …
> The charity shop was just, I think they'd picked up my name because I'd given a donation or something and they must have…   And they wrote to me, would I consider volunteering?  So I thought, oh OK.  And I met the lady that's in charge I think of the hospice shops in Edinburgh.  And then she wasn't terribly well organised though because I went down to meet her and that was fine and then I said I wanted to work in the shop in Morningside and that was fine, so I was to go the next week, on a Monday.  When I went in on the Monday the girl didn't know anything about me coming or starting or anything and Monday wasn't a good day for me to come and…  So she suggested another day, so that was a bit haphazard."
>
> (Café volunteer EL1, EL Centre)

Interviewing the volunteers showed that the majority of them decided to do volunteering because they had autonomy at work with less supervision from the managers than in a paid work (matching the review of the nature of volunteering work, see section 1.3). The role clarification was thus perceived to enable the volunteers to exercise this work autonomy confidently without feeling pressured. However, VPC fulfilment through the role clarification only highlighted that it was beneficial for the volunteers; it did not explicitly indicate the volunteers felt more engaged to their TSO because of it. Therefore, the analysis of the data in this part also suggested the VPC fulfilment had an impact more at the individual level.

**4) On feeling proud of volunteering**

The VPC fulfilment by a feeling of pride was found most among the outreach project volunteers at Age IT and some befriending volunteers at EC Support. The data showed that this feeling was generally developed from a sense of achievement. That is to say, these volunteers felt good when they felt they had helped their clients. In addition, the analysis indicated these volunteers' desire was mainly to maintain their volunteering identity, developed by extensive participation in volunteerism (as analysed in section 6.2.3.2).

"So one of the very fulfilling moment was when my befriendee went to the hospital, she doesn't have any relatives and friends here. I went to the ward to see her, and the moment when I went to her, she reached her arms and [said], 'come, I want to touch you', and her hands were shaking. And she just wanted to feel like someone is around, and I am so happy. And sometimes when I come and go, she was like 'thank you so much'. And it's good to get appreciated."

(Befriending volunteer EC3, EC Support)

Therefore, the results showed that these volunteers cared primarily about their client and their work. Further data analysis also suggested that the VC work actually added value to keeping these volunteers committed VM implementation (details in Chapter Seven).

**5) On communicating openly with the VC and the peer**

Unlike the previous four, the perception of the VPC fulfilment elaborated in this section was actually formed under some influence of actual VM implementation, although the volunteers' own desire still played a crucial role. The findings indicated that volunteers saw open communication as important. This indicated the type of VOR they had with their VCs. All reported that they generally had a good relationship with their VCs. Most of them felt it important in general to have a good relationship with others. However, the interview data showed the volunteers took different narrative positions in talking about their volunteering experience. From the perspective of 'self-narrative', these volunteers tended to position 'self' differently. For example, the befriending volunteers at EC Support used expressions such as 'we' in the interview, suggesting they belonged to a team, and they referred their VCs in a sense as their 'leaders' on whom they could rely. The volunteer from the Day-care Centre felt satisfied because he felt to belong to a 'nice' team. The Project and the IT class volunteers at Age IT focussed more on the (different) 'self', highlighting personal volunteering experience. And the volunteers at EL Centre used 'they' to refer to the TSO's employees, to claim the volunteering satisfaction.

"…*they* are friendly staff…"

(Café volunteer EL4, EL Centre)

"That involved a lot of really learning about boundaries, what *we*, as befriender, can and can't do and so on… There are a lot of communications going on with regards to that, *we* have focus day, actually just got one coming up this Saturday, obviously just for befrienders to meet. *We* do ice breading exercises, and sharing experiences of befriending experiences."

(Befriending volunteer EC3, EC Support)

"On a Monday I do Age IT. And the other thing I do is, with the public libraries, they do computer training – just like Age IT – very similar to that. And I also do something called 'Read Aloud' – once a month we go to care homes and read stories and poems to these older people."

(IT Class Volunteer AI5, Age IT)

Open communication also related to how some VCs conducted the review meetings. All the befriending volunteers at EC Support talked about their review meetings and the feedback they received. In addition, the volunteers in this study were positive about opening communicating channels such as social gatherings and social media in addition to training sessions and review meetings (refer to Chapter Seven). The volunteers also felt they received emotional support from their VCs through such open communication. It allowed them to seek advice and help from their VCs and feel supported and understood. The data showed that this emotional support was important to keep the volunteer participation, and to ensure that the volunteers did not feel left alone.

"I can speak to [the project manager], she does have the time on the phone, cause I can chat, she seems to be quite a listener, she is good, she would listen. In the initial stages, I think I chatted her about a few issues and concerns, cause I just felt it's really injustice, but you know, I've just pull myself back from that now, cause I can't physically do anything about it, and I have shown my concerns, and you know, didn't enjoy my role, I had to take a step back. But initially it was quite hard."

(Befriending volunteer EC1, EC Support)

"I told [the project manager] about this, and you know they were showing sympathy to me, and they said 'yeah, you did all that you could do and even more.' So they were supporting me emotionally."

(Befriending volunteer EC3, EC Support)

The study found the effectiveness of the open communication (between volunteer and VC) was important to maintain a good VOR. There was in fact open

communications between the volunteers and the VCs in all three TSOs. However, the VCs had different approaches to managing that communication and not all the VCs conducted it effectively; these different approaches indicated how the VCs perceived their VM responsibilities and how they actually implemented VM practices (details in Chapter Seven).

Interviewing the volunteers showed that their VPC was fulfilled because of one or more (or all) of the five reasons set out above. Each of the five suggested that the VPC fulfilment largely relied on what an individual desired (motives and expectations) on entering the volunteer role, even though the last two reasons showed signs of the influence of the VM implementation. Therefore, the VPC fulfilment (reflected in volunteering satisfaction) was mainly achieved at individual level; and little evidence suggested the direct link between the VPC fulfilment and volunteer engagement and retention at organisational level. The next sub section (6.3.3) thus explores the impact of VPC fulfilment on the TSOs.

### 6.3.3 Volunteer contribution to TSO: extending the impact of VPC fulfilment through effective VM implementation

The analysis in the previous sub section (6.3.2) suggested VPC fulfilment at the individual level led to smooth task delivery/completion, a benefit to the TSOs. But the data analysis also indicated that the fulfilment facilitated by effective VM implementation made a greater impact on the TSO performance, in terms of engaging and retaining volunteers. In this study, the volunteers who felt they received good support from their VCs increased and extended their volunteering commitment such as promoting the volunteering work (recruitment and selection of new volunteers through recommendation), developing a stronger sense of social responsibility, taking initiatives of widening their participation in the TSOs' activities, and increasing their volunteering workload.

Some volunteers recommended the TSO to their friends and families, and encouraged them to volunteer. This also enhanced the TSO's public reputation, which is likely to help them with seeking further funding (as discussed in section

1.3.2). These volunteers mainly made such recommendations voluntarily; this also suggested that they took initiatives to help their TSOs.

> "I actually got one [friend] to join [EC Support]… She seems to [enjoy the role]… I will make her relax as much as possible…"
>
> (Befriending volunteer EC4, EC Support)

> "I would try to spread words and take more people in. I realised this is needed, I tried to do that."
>
> (Befriending volunteer EC3, EC Support)

> "Yeah, there was a couple of people have been asking, in fact two doctors that I know have asked me about it, and because they know I did some fundraising things, cause they obviously know about [EC Support] charity, and they'd asked about it… I didn't even know about them [the TSO] until I'd done my own research; but, it is a lovely charity to work for and I am glad I have chosen to work for them, I have no problems and I will just continue, you know maintaining it really."
>
> (Befriending volunteer EC1, EC Support)

Other volunteers expressed their satisfaction through furthering their volunteering participation. They started from having a vague volunteering expectation, and then went on to developing a stronger sense of social responsibility and striving to continue to contribute to the society through volunteering.

> "To be honest I didn't know much or didn't expect anything, I just went to see what it was like [as a befriending volunteer]… it would help [me] a lot with [becoming] a doctor and also developing [to have empathy]. And increasing, [my] social and communication side, I think that's helpful [to my future career as a medical doctor]."
>
> (Befriending volunteer EC5, EC Support)

Furthermore, satisfied volunteers took initiatives in helping the TSO. They either requested more hours or carried out additional tasks whichever was helpful to the TSO.

> "I did ask if I could have the second one, that's one I have it on Monday."
>
> (Befriending volunteer EC4, EC Support)

> "I did a bit of fundraising for them, and I did a couple of events, I did the parachute jumping, held an evening to raise charity for this befriending project."
>
> (Befriending volunteer EC1, EC Support)

The analysis in this sub section revealed that the VPC fulfilment could have wider impact on the TSO if the VM practices were effectively implemented. This suggested the influence of the VCs in the VPC fulfilment and the volunteer engagement and retention. To various extents, the volunteers all indicated the role their VCs played in their gaining volunteering satisfaction (the VPC fulfilment). Detailed analysis of how the VCs themselves perceived their work are provided in the next chapter.

### 6.3.4 Section summary

In summary, VPC fulfilment happened mainly at individual level, and it was influenced by individual 'predisposing factors', i.e. individuals' demographic background, volunteering motives and expectations. Most of the volunteers claimed satisfaction through volunteering in terms of task completion. However, there was little evidence that the TSOs received much benefit beyond task completion in respect to achieving 'voluntarism' through engaging and retaining their volunteers. Further analysis of the impact of the VPC fulfilment on the TSO suggested that VPC fulfilment at individual level did not ensure that VM implementation would have of engaging and retaining volunteers.

### 6.4 Chapter summary and conclusion

Understanding the making and fulfilment of the VPC supposedly offers a fuller picture of the building and management of the volunteer-organisation relationship (VOR). By linking strategic management to the management of the VOR, VM can help attract, engage and retain suitable volunteers to benefit a TSO's performance (refer to sections 2.3 and 2.4). The findings presented in this chapter supported that claim, and also revealed that the VPC fulfilment at individual level mainly contributed to the task completion at local level within the TSO. This could also be referred to as increased job commitment (as indicated in figure 2.4); but little evidence supported a direct causal link between individual VPC fulfilment and

volunteer engagement/retention. This suggested that the TSO performance did not strongly benefit from the VPC fulfilment (volunteer satisfaction).

The findings indicated that VPC fulfilment was through realising 'beliefs' at individual level. Volunteers formed their 'beliefs' on accepting that the TSO would keep their 'promises' by realising all the VPC terms (both transactional and relational). Evidence supported the claim that VPC fulfilment was achieved by realising the 'beliefs' formed by encoding and decoding the TSO information. The analysis in this chapter considered various external and other factors influencing how individual volunteers interpreted external messages and were influenced by 'social cues' informing their 'beliefs': external messages being TSO information, and 'social cues' the influence of others. In additional to these two external factors, individual demographic backgrounds also affected how they saw the benefit of volunteering, and why they joined a specific TSO. These made up the internal process Rousseau (1995) referred to as the 'encoding' and 'decoding'. This internal process then allowed volunteers to form and accept 'beliefs' as to what she/he could expect from her/his TSO on doing the required work. Therefore, the 'acceptance' of formed 'beliefs' as an outcome of 'encoding' and 'decoding' completed the making of VPC. In the final VPC stage of 'reliance', data analysis revealed the VPC fulfilment perceived by the volunteers. The analysis particularly focussed on VPC fulfilment as seen by volunteers: indicators of the VPC fulfilment and the impact of this fulfilment (benefit to individual volunteer and/or benefit to the TSO performance).

This chapter also provided empirical evidence of the complex and diverse nature of volunteering motives and expectations (refer to section 1.3). The findings indicated that the majority of volunteers were driven by personal motives and expectations to enter a new role. The analysis explored the last two VPC stages: reaching 'acceptance' and the VPC fulfilment through 'reliance'. The internal process, resulting in 'acceptance' entailed forming individual 'beliefs' through accepting TSO 'promises'. 'Acceptance' was followed by the fulfilment. The volunteers perceived VPC fulfilment differently, depending on the individual 'beliefs' they formed; but all reported the importance of gaining satisfaction at individual level. VPC fulfilment

was influenced by the volunteers' 'initial' desire. Such desire could be altered into an enhanced volunteering desire if they received good support from their VCs.

The results so far also suggested that the VC's work on engaging and retaining volunteers through effective VM implementation had some impact. The data did show that some volunteers developed a sense of belonging (as shown in section 6.3.3). This may be because their VPC made on first entering the role was positively shaped to better match the TSO needs. In this case, the VPC making and fulfilment could be a continuous activity alongside volunteer participation; and the lasting effect of this activity would likely result in volunteer engagement and retention. Facilitated by the VC's work, the outcome of such continuous activity created a synergy of 'volunteerism', and thus led to 'voluntarism'. Detailed analysis of the impact of the VC is provided in the following chapter.

# CHAPTER SEVEN: Impact of VC on the outcome of VM implementation

## 7.1 Overview

Box 7.0 Overview of chapter key analytical points

---

**The role of VC as volunteer line manager: VM responsibilities**

. Volunteer recruitment and selection activities: Communicating 'promises'

. Volunteer training and development

. Volunteer review and feedback

. Additional support to achieve effective VM implementation

- Emotional support

- Cultivating a friendly and relaxing volunteering environment

. Maintenance of the VM structure

**Factors influencing VC performance/work**

. Influence of CEO: level of autonomy and support given

. Challenges faced by the VC – diverse roles and responsibilities

. Influence of predisposing factors

**VC management styles**

. Approaches to VM implementation

. Influence of VM implementation outcomes on attracting and retaining volunteers

---

This chapter provides detailed analysis of the findings about two elements: first, the VM activities carried out by the VCs, and second the factors influencing the actual implementation outcomes. The latter include external factors (the level of authorities given by the CEOs and the challenges due to the diverse roles and responsibilities) and internal factors (the VC demographic backgrounds and perceived value of VM). The last part of the chapter discusses two different management styles and their impact on engaging and retaining volunteers. In addition to answering research question 4, the later part of this chapter focusses on a further finding about the impact of the VC on TSO performance through engineering volunteer retention.

**7.2 The role of the VC as volunteer line manager: VM responsibilities**

**7.2.1 An overview of VC responsibilities**

In this study, the VCs took full responsibility for all VM implementation. Their influence on its outcome was apparent across different stages of the VPC, particularly on communicating 'promises' and fulfilling the VPC to ensure reciprocal benefits. The role of coordinating volunteers consisted of two main responsibilities: supervision and support. The supervision meant managing task completion to ensure the volunteers delivered the work as required; this suggested that the VCs were instrumental in making sure the TSO expectations were met. As well, support for volunteers paid attention to their (emotional) well-beings through meeting individual needs; this indicated that the VCs were responsible for ensuring that volunteer' expectations were met. Positively perceived VC support led to volunteer satisfaction, so reducing unexpected volunteering withdrawal while increasing the volunteers' engagement (see section 6.3.2). Acting as the volunteer line manager, the VCs were responsible for communicating the organisation's expectations and 'promises' explicitly to volunteers to ensure that their work met the requirement. This responsibility for communication has been referred as a 'social cue', an external influential factor on volunteers' 'belief' formation (see section 6.2.2). From the TSO perspective, the VCs were the primary influence on the process of VPC making and fulfilment, through volunteer recruitment and selection, training and development, and performance review/feedback.

In the analysis of the VPC making and fulfilment (as shown in Chapter Six) volunteering individuals formed their 'beliefs'; and the TSOs also formed their 'beliefs' that the volunteers would keep their 'promises' to participate in the work as agreed. The VCs represented their TSOs, and so their own interpretation carried the TSO 'beliefs' as to supervising and supporting volunteers. Reciprocal benefits could only be achieved when both parties' 'beliefs' were realised in the VPC fulfilment; therefore, this showed the VCs' crucial importance. Their perceptions of the volunteer contribution and the need for VM influenced how they interpreted both parties' expectations of entering the VOR. At the same time, the VCs also formed their expectations of how to carry out VM work (that is, to implement VM practices).

The findings showed that differences in the VCs' expectations led to diverse views on the challenges and difficulties they faced at work. Details of this aspect are provided in section 7.3.

All the VCs reported a high level of autonomy in VM implementation; some of them were even responsible for the VM policy reviews and improvements. This was because the majority of the VCs in the study were appointed to manage volunteer-based services, being responsible for all aspects of their project. Thus, how they carried out their VM work also influenced the outcome of running the projects. The first half of this section looks at how the VCs maintained the structure of the VM policies and practices, and how they carried out their work to implement the VM (volunteer recruitment/selection, training/development, and performance review/feedback). The later part then explores the types of support that the VCs provided to ensure the VPC fulfilment; these activities were carried out informed by the VC's perception of the volunteer contribution.

### 7.2.2 Maintenance of the VM structure

In this study, some VCs were responsible for reviewing, and updating the VM policies and practices. For example, on the befriending project, both the manager and the project assistant at EC Support had substantial involvement in reviewing and updating VM policies and practices. Although the project manager joined the TSO after the project had been running for 2 years, she introduced additional VM practices to ensure efficient support to befriending volunteers. And from the time the assistant joined in January 2012, he has also been involved actively in discussions about VM improvement.

> "…on the whole, the project was generally up and running cause they have been going for a couple of years and but there were still, I think like any other projects, there were always room for developing and so there has been quite a few changes and amendments that I have made when I started just things I would maybe do a bit differently or things I thought might be useful to add, or missing. There were maybe a couple of changes to policies and things, a couple of changes to day to day documents that we use…"
>
> (Befriending project manager, EC Support)

"… I mean not particularly at the broad policy to do with mission statement, so and so forth. But it's definitely to me as well to flag up something to say, 'well here is something happened but the policy doesn't cover at the moment', and then somebody ultimately the CEO would have thought like 'yeah, that's important, we change policy to cover it'. So I feel that I am able to suggest things that I came cross that may impact on the policy or if there are things, certain procedures that volunteers need to do, although we do things on volunteers' behalf like risk assessment for a client's home to make sure it's safe."

(Befriending project assistant, EC Support)

In contrast, at Age IT, the project manager took responsibilities for simply implementing the VM policies and practices as established by the CEO. Despite constant discussion between her and the CEO, there has not been much change in the broad framework in managing volunteers. The VC's focus was on how she carried out her role as the project manager and how she managed and supported her project volunteers.

"That's more [CEO's job to develop VM policies]… project is an outreach project of [the organisation]. So some of our policies for the organisation are obviously umbrella. [The VM for the project volunteers] comes under it, you know, our equal opportunities policy, things like that."

(Project manager, Age IT)

Evidence showed that the project manager at Age IT had made a recent proposal to introduce volunteer review. It was also interesting to observe that information about this was actually obtained from one of the project volunteers, not from either the CEO's or the VC's interviews.

"[The project manager] is currently speaking to all the volunteers … And a review, it's not an assessment, I mean she's not doing an assessment, but it's just, you know, looking for anything that she can help, just feedback in any way that she can help really… It's one to one [meeting]… I think that's the first time she's [referring to the project manager] done it [volunteer review]. But I know it's something she intends to carry on."

(Project volunteer AI4, Age IT)

Although the proposal of introducing one-to-one review could add value by better supporting the volunteers, concern was expressed about whether or not it was feasible to keep up this practice on a regular basis. This was because Age IT had

limited human and financial resources to facilitate VM. Therefore, the proposal's actual implementation remained questionable and the potential benefit remained in doubt. Nonetheless, evidence indicated regular volunteer review would provide effective support to volunteers; but failure to sustain the exercise would likely make a negative impact on the effectiveness of VM implementation.

In all the TSOs, VM practices were supported by relevant documents (refer to table 3.4), though the contents of VM documents varied (some differences being trivial). Review dates printed on EC Support's VM documents demonstrated that they were the only TSO of the three to conduct regular policy document reviews. This review was carried out by the VCs with the CEO's approval. Some changes on befriending volunteering practices at EC Support had actually been made based on volunteer feedback gathered.

> "There were maybe a couple of changes to policies and things, a couple of changes to day to day documents that we use, but even to get feedback from volunteers and our clients, so suggesting new things and we will add, adapt to things to suit try and make things work a bit more smoothly or efficiently."
> (Befriending Project manager, EC Support)

Although in each TSO VM policies and practices had been established, the various VCs implemented them differently. For example, the VCs at EC Support mainly used these VM documents as general guidance, and they usually carried out the recruitment and selection to suit individual situations. While they acknowledged the need for structured VM, they perceived it as being most useful in facilitating the VOR; accordingly, they paid more attention to the volunteers rather than to following the procedure.

> "It shows me the importance of having policies or having framework to work within, and within that framework, you could still be quite personal and build up personal relationships, that's very useful, very good to know what you want the outcome you want to be and how you are going to get there."
> (Befriending project assistant, EC Support)

The befriending project assistant further described one of his recent experiences in recruiting a new volunteer, from the starting point where the person came into the office and an informal meeting was arranged, to the end of the initial recruitment and

selection process. The narratives of his experience further highlighted the need to have an established structure while flexibly adapting different approaches to different situations. The VM framework could be seen as the TSO 'promises' made to attract potential volunteers. But the VCs' communication actually shaped the volunteers' interpretation of these 'promises'. This will be discussed in the next section (7.2.3).

> "Yes, I mean [with standard interview questions] [the assistant referred it as 'headings'] … I am just thinking again about yesterday [as] a recent example. If I just go ahead strict with the *headings*, and I probably would not have found out as much as I can and wanted to know about his current situation about what he's working at, what he's doing, where does he stay. … because you could always ask more questions under the heading."
>
> (Befriending project assistant, EC Support)

In summary, the data analysis suggested that maintaining the VM structure could have positive impact if it aimed to 'evolve' to better suit the volunteers' needs and their volunteering expectation. The VCs could *effectively* implement VM practices because they were allowed to assess and evaluate the suitability of the VM policies and practices in action. Effectively carrying out different VM activities (recruitment and selection, training and development and performance review) also gathered feedback and comments from the volunteers to further improve the VM outcome.

**7.2.3 Volunteer recruitment and selection activities: Communicating 'promises'**

The VCs influenced how the volunteers accepted the TSO 'promises' through clarifying the volunteering role and responsibilities in face-to-face interviews or other means of direct contact at the recruitment and selection stage. The goal was to ensure that suitable individuals were attracted and selected, despite the different communication approaches used by the various VCs. Through providing further information (as a 'social cue') on the roles, the VCs communicated the TSO 'promises', thus influencing volunteer's internal process ('encoding' and 'decoding') (see section 6.2.2 in Chapter Six).

The VCs helped the volunteers complete the first VPC stage through their recruitment practices. In the three TSOs different activities were involved in this (refer to table 5.1). All the VCs reported it took time to go through the recruitment

and selection, but most VCs perceived it to be necessary to avoid taking on unsuitable people or having early volunteer withdrawal. In addition, some VCs mentioned that by spending more time they benefited from selecting more suitable individuals, as it allowed them to find out as much as possible about the individuals during the interview, and get a better understanding of their volunteering motives and expectations.

> "There was another [person[ who came in, and first question I asked was why you would like to become a befriender, and he said, 'well, I have to do some kind of volunteering to be able to get my scholarship.' I was like, oh right, that's fair enough, but why did you apply for befriending specifically? So [it turned out] he came through the EUSA website and he was like 'I just applied for lots of different ones, and you were the one that got back to me', I was like, right, 'so is there anything specific interest you about who you work with?' 'No, I just need to do some volunteering, is it possible that I can start next week?' I said, 'no, don't think you have read the role description properly.'"
>
> (Befriending project manager, EC Support)

> "The other thing starting to happen [during the interviews] is to go through almost step by step the main responsibilities of the volunteer. Cause there's a lot of things that say befriending volunteers are expected to [do]… separately and that's fine. But it might be certainly for some people who you may not be sure whether there is certain responsibilities they actually would be able to manage; somewhere for you could actually go through step by step through each one of those responsibilities and just say 'would you be ok with that? How would you manage that?' "
>
> (Befriending project assistant, EC Support)

The requirement of a minimum volunteering period was subject to the nature of the role and the responsibilities assigned to the volunteers. Different requirements on this also indicated the specific recruitment strategy each TSO adopted.

> "We kind of hummed and hawed about putting a time frame and 'you must be able to volunteer for [a certain period of time], but we just didn't want to exclude anyone. So we've decided not to do that."
>
> (Volunteer manager, EL Centre)

> "We ask people to commit for at least a year, if no longer, if it developed into natural friendship, we are not needed any longer, then we step from it, you know the relationship is still happening but just wouldn't be under our project…"

In terms of volunteering frequency and amount of hours, the TSOs had different requirements depending on the roles. Details were provided in relevant documents (i.e. the recruitment advertisement, description of volunteering roles and responsibilities). All the VCs offered flexibility to the volunteers, aiming at meeting individual circumstances. The VCs were also accommodating in altering the arrangement if necessary (such as a rota change due to unexpected situations). Findings on this aspect indicated the VCs' expectation of the volunteers was that they should show up for their agreed sessions under normal circumstances, but would inform the TSO of any situations which would interrupt the usual volunteering commitment.

> "They [volunteers] are really good. Even those [volunteers] looking for work email me when they can't make a shift…and if they get an interview, they'll phone the Centre and let us know."
>
> (Volunteer manager, EL Centre)

> "I expect them to work if they say they are going to come in… but if they take weeks off to visit a relative the other side of the world; you just have to accept that!"
>
> (Day-care Centre manager, EL Centre)

The VCs saw the arrangement of the reimbursement as necessary to support the diversification in the volunteers' demographic (to accommodate an individual's financial constraints), and to encourage wider volunteering participation. The establishment of this transactional term was subject to the nature of the volunteering role, as well as to any ad hoc matter arising. Expenses claim forms were in place across the three TSOs, indicating that this has become a standard practice in their VM structures. This type of transactional term was important to ensure the volunteers would not have to bear financial cost for volunteering; it also suggested that managing the volunteer workforce was not cost free. The money for reimbursing volunteer expenses was part of the cost of running the projects.

> "Because that's often, I think in the past that you have to be quite well-off in order to be a volunteer.  You need to make sure that people have their travel expenses reimbursed or if they're doing something and they need to buy

> lunch, which you provide something.  Because that means that everybody can think about being able to make a contribution then and not have to come out of their own pocket if they're a volunteer, and I think that's really important."
> (Outreach project manager, Age IT)

The transactional terms analysed in this sub section suggested that the TSOs' 'promise' to the volunteers was made in exchange for their contribution. The VCs undertook the VM work to fulfil these terms, and thus they   carried out the supervision of the volunteers to ensure smooth task completion.

At the end of the recruitment and selection process, the VCs offered suitable individuals work and thus started to arrange for the next step, usually a 'trial' session appropriate to the type of volunteering activity, the 'trial' session was designed to give prospective volunteers a 'real' feel of the work. It was normally carried out by inviting applicants to participate in actual volunteering tasks before they decided to accept the offer (and in that sense could be seen as a type of 'social cue'). Age IT, and the EL Centre's café work and Day-care centre all introduced this 'trial' session, but organised it different ways. It usually happened after volunteers went through the initial recruitment and selection process and were accepted, and it offered the prospective volunteers opportunities to communicate with their future peers (another type of 'social cue'); this was thought to be another form of role clarification.

> "The other thing that the [outreach project] did, which I didn't expect, and actually was very good, is they made you go and visit one that was already operational… Well actually it was the week before I was starting. I'd done everything and I was just going to start my own one."
> (Project volunteer AI2, Age IT)

Some VCs arranged the session only with those who had not worked much in a similar environment. For example, the Day care centre manager at EL Centre arranged the trial period for those with little experience in dealing with her special client group, people with dementia. The manager claimed that she had lower expectations of her volunteers in terms of the level of skills and knowledge, compared to her expectations of her paid employees. She mainly

recruited the volunteers simply to work socially (not medically) with the client group (interview quotes 7.1 in appendices).

Unlike the Day Care Centre manager, the volunteer manager at EL Centre organised the 'trial' to all new starters at café. They worked in the café during the period, undertaking on-duty training. It seemed that some new volunteers may have used this period to decide whether or not to stay. But the volunteer manager expected that the new volunteers would stay since they were already given the training. Therefore, she felt frustrated at having wasted her time and effort when not all new volunteers stayed on after this period.

> "…what I try to do is, once the references came back, I met with them and then did it on a trial basis, you know, showed them the system and then, you know, let them do it for a couple of weeks, or however long, and then, because I'd already shown them, and then they were away."
>
> (Volunteer manager, EL Centre)

The intention of the trial session was to retain as many new starts as possible, for as long as possible. Its purpose was to make the new volunteers understand what they were 'signing up for', before making the final decision to accept or reject. It consumed time and effort, but it also helped reduce the later stage withdrawal which could disrupt the flow of task completion. Although the 'trial' session was put in place with good intentions, the VCs had to acknowledge that not all the new volunteers felt obliged to stay, despite the VCs' time and effort. If training sessions do not guarantee volunteer retention, this likely just reflects the 'uncertain' volunteer behaviour (as discussed in section 1.3.1). This analysis also indicated that the VCs' over-optimistic expectations of training had an impact on the effectiveness of actual VM.

### 7.2.4 Volunteer training and development

Volunteer training followed from the recruitment and selection, focussing particularly on work-related skills. None of the volunteering roles in this study required the volunteers to have specific professional knowledge, and thus the VCs

mainly conducted the training to show the volunteers how to carry out work properly. The training arrangement was seen as a relational term, since different training sessions were organised across the volunteering period, such as initial training (all of the voluntary work), follow-up training, 'volunteer focus groups' (Befriending project at EC Support) and 'volunteer social events' (the outreach project at Age IT). Work related skills and knowledge helped successful task completion as an immediate effect, but they could also serve the purpose of enhancing a volunteer's employability. For example, skills needed to work at the café (EL Centre) were almost identical to working in any café, thus the café volunteers could take advantage of their volunteer training in job seeking.

In terms of delivering the training sessions, there were different forms across the TSOs, including off-duty and on-duty training. The findings in respect to this reflected relevant the literature review on types of relational terms (see section 2.4.2). All the TSOs offered initial training to introduce the work, on or off-duty. Not all the initial training programmes were developed formally, and the actual delivery methods also varied.

> "Usually in the training, quite early on, we make sure people – especially if they've never visited someone in a care home – get a chance to go and visit a care home."
>
> (Outreach project manager, Age IT)

> "We did training sessions and encouraged discussion – it was really good for us all to be together."
>
> (Day-care Centre manager, EL Centre)

Furthermore, all the VCs reported that training tended to be time consuming as regards the time and effort required for preparation and delivery. Some VCs stressed that it could be a waste, particularly when some volunteers left soon after the completion of the initial training.

> "…because I'd already shown them [how to work on café], and then they left. So that was a bit hard."
>
> (Volunteer manager, EL Centre)

In terms of the volunteer roles, the initial training for the befriending work at EC Support, for example, was made compulsory for new volunteers before they could be matched up with a client; this was similar to the outreach project requirement at Age IT. This was because both projects aimed to support vulnerable client groups (physically disabled people and elder people who were retirement house residents). For the befriending project, the initial training was conducted only three times each year. Thus there was sometimes a time gap between the time of receiving an offer and the time of training and then actually embarking on the work; this gap could be weeks or even months. Without clear explanation at recruitment stage, such a long waiting period was likely to cause new volunteer withdrawal. Therefore, the VCs had to make sure new volunteers understood the necessity of waiting for initial training before actually commencing the work. This highlighted the importance of effective communication to the volunteers at recruitment and selection (further supporting the analysis in section 7.2.2).

> "in any case, just in normal course of events, you could still think of several months before they can be matched up if becoming the wrong time of that training cycle…always at the first interview we say, 'the next training is going to be', cause at that time you will always know when the next training is going to be, so they know from then 'I might have to wait this long or that long before I can get the training'."
>
> (Befriending project assistant, EC Support)

In this study, some TSOs used the initial training to deliver more than just work related skills. The VCs also took this opportunity to convey the project objective and social value to new volunteers, so that they appreciated the purpose for delivering the service. The training thus became a means to enhance volunteer awareness of the organisational social value and vision. In this sense, the training outcome was likely to engage volunteers to the organisation from the beginning, and to encourage them to improve their work performance and/or to have wider participation, helping the TSO performance. As a result, some volunteers' primary motives and expectations were shaped through synchronising their social value and vision with their TSO's.

> "In the beginning it was 10 weeks, because a lot of our volunteers didn't have very extensive computer skills, now we get people who are much more

computer literate… The challenge then was trying to get them to see how they would introduce sending emails to somebody who's got no idea about them.  So now our training courses, I think the last one we ran was for 6 weeks and we reckon it wasn't quite long enough, because it's like we need long enough to get people into the culture of our organisation, because it's not all about you being good at the computer, it's about what the long-term aims of the project are.

...a feature of the project is we've got volunteers who've been with us for seven years… we offer volunteers not only the chance to keep learning, but also because on a day to day basis they sort of set the agenda, they decide what they're going to do. They make the project."

(Outreach project manager, Age IT)

For follow-up training, the focus was placed on any issues that emerged from the day-to-day work. The analysis suggested that follow up training was primarily designed to connect the volunteers. This type of training was therefore conducted rather informally. The training agenda was usually volunteer-led, thus the volunteers were empowered by their VCs to reflect on their volunteering experience. The data analysis indicated that this VM implementation approach benefited both the organisation and volunteering individuals: the volunteer led agenda helped improve the actual work performance, adding value to the project success; the volunteers in the meantime felt more valued and appreciated by the organisation (refer to chapter Six), and so increased their engagement to the organisation.

"I started to do biannual volunteer focus group day, social day to get all volunteers together, have a focus group with me ask their ideas, and things and give them chance to raise any issues they have, just have a bit of training on the topic they would like
…
By giving them feedback on the role so we do reviews regularly with the [clients] and get feedback on how has been going and things, also just checking on [volunteers] regularly with support and supervisions. We go out and do something fun and social like lunch, bowling or something like that. I think those days are really beneficial … to get feedback from the volunteers after those days, they found it very motivating themselves because they're hearing from other befrienders experience, sharing experience … some people feel that they are really on their own with befriending because this is one to one, they can feel like you know if they are having certain difficulties with befriendee, then it's nice for them to hear from other volunteers that, usually it's common thing, it's not just them, so they get out a lot by sharing experience as well. That keeps them motivated as well."

(Befriending project manager, EC Support)

Knowing how the VCs carried out training and development activities, the findings demonstrated the VCs' autonomy and flexibility in organising and running the training activities. Although detailed information on this VM aspect was written in the policies and practices, some VCs were still able to adapt formats to deliver the training sessions more effectively. The analysis so far in this sub section showed that VCs perceived the purpose of training differently: to achieve smooth task completion, to promote a sense of social value sharing between the volunteer and the TSO, and to involve the volunteers more through empowerment. These different purposes thus indicated that the VC's task was not only to complete any scheduled training sessions as per policies and written instructions, but also to provide regular support to volunteers throughout their participation.

Feedback given by the volunteers during the follow-up sessions helped improve task completion, but more feedback and review were needed to allow the VCs to better identify individual volunteer's needs. Thus, the VCs in general perceived (individual) feedback as beneficial to the TSO. The next sub section considers the impact of this on VM implementation.

### 7.2.5 Volunteer review and feedback

The data analysis suggested that regular review/feedback meetings were important to engage and retain volunteers. These meetings were a means of supporting volunteers primarily to fulfil their expectations (the individual VPC fulfilment), and if carried out effectively to further engage and retain them. Such VM practices also allowed the VCs to check whether or not the individual volunteering motive and expectation were met (the level of volunteering satisfaction), and to identify any further support needed to maintain the volunteer satisfaction. They also provided the VCs opportunities to identify any change in the (primary) volunteering expectations. The review meetings were mainly carried out formally (acting as actual VM implementation); but some VCs in this study also conducted the meeting informally. In terms of the meeting frequency, different time intervals - monthly, biannually, and even daily or weekly - applied, some different from the intended interval as written in the documents.

The VCs in the three TSOs used different approaches to review volunteers'
performance. EC Support and EL Centre established review as part of their VM
structure. The befriending project manager at EC Support arranged one-to-one
regular reviews with all the volunteers, in addition to their monthly social gatherings
and focus groups. The volunteer manager at EL Centre had the review embedded in
regular meetings with the volunteers at group level.

> "We offer our supervision in meetings, because it's a time factor. We can't
> meet everyone one to one and give them an hour, you know, a month, of
> supervision. It's just not possible…showed them [new café volunteers] the
> system and then, you know, let them do it for a couple of weeks, or however
> long, and then, because I'd already shown them, and then they were away…
> So that was a bit hard.
> …
> for example, in Tots' Togs [charity shop], then [volunteer EL2] is really good,
> she can, you know, she can weeks on end she just does it herself, you know,
> she just deals with it. Whereas I think a lot in the café just want that wee bit
> of reassurance and they do ask a lot of questions."
>
> (Volunteer manager, EL Centre)

VM was implemented instrumentally by carrying out the review and feedback
selectively (meeting with those less competent). Consequently, this would influence
the level of volunteer engagement to the TSO hence volunteer retention. This also
echoed some volunteers' views on having regular review meetings with their VC.
For example, the charity shop volunteer (EL2) at EL Centre enjoyed monthly
meetings with the volunteer manager; but regretted that she has not had such a
meeting lately. The volunteer manager's interview also showed that much of her VC
focus was given to café volunteers as she had little concern with the charity shop
volunteers.

Unlike the volunteer manager, the Day-care Centre manager tried informally to
approach her volunteers individually on daily basis, which was not formally
established in any written format. Such regular informal conversations reflected her
working style as a "hands-on manager". In addition, there were regular formal
reviews for newly joined volunteers. These two different patterns showed a flexible

approach, focussed more on ensuring her volunteers were "happy" rather than ensuring that VM structure was followed rigidly.

The project manager at Age IT also provided review and feedback individually and informally whenever a volunteer approached her, in addition to the regular social gathering (coffee mornings) she organised. The VCs' interview data indicated that most of the VCs recognised the importance of offering regular feedback to volunteers to show both support and appreciation, but the level and focus of support varied from one to another, apparently influenced by the management styles they adopted.

The befriending volunteers at EC Support received their reviews every three to six months, depending on their length of service. Although this frequency was much less than at EL Centre, the VCs also communicated with the volunteers informally, responding to individual needs. The befriending volunteers all expressed satisfaction with their levels of support and recognition.

The core purpose of the review was to ensure that the VCs had regular updates of their volunteers' performance and were informed in time of any issues. It was a means of realising 'beliefs' to fulfil the VPC. Volunteer review and feedback enabled open communication between TSOs and volunteers, facilitating the VPC fulfilment. Evidence showed that the review meeting was more effective if conducted on one-to-one basis; this also indicated that the VPC was made at individual level. The one-to-one basis ensured that all the volunteers had an opportunity to attend such a meeting, as not everyone attended every group meeting organised by the VC due to outside commitments (refer to volunteer interview quotes in section 6.3.4 in Chapter Six). All the VCs acknowledged that their volunteers had diverse volunteering motives and expectations (see section 6.2.3.2). In this regard, the findings suggested that the review and feedback fostered individuals' development beyond specific volunteering participation. Effectively carrying out review and feedback helped the VCs engage and retain the volunteers for their TSO, beyond merely fulfilling the VPC at individual level.

The variation in review and feedback formats was influenced by various factors. Different VCs' perceived the value of the review differently, reflecting their individual management styles (detailed analysis in the following section). So far, the focus has been on how the VCs implemented established VM policies and practices. Most of these had a certain level of structure in terms of formally set up instructions, although the actual delivery approaches varied. The findings suggested that implementing formal practices was not the only responsibility VCs had in VM implementation. Their influence was also found in more intangible aspects such as emotional support and ensuring a friendly and relaxing working environment. As there were no fixed rules on how to do this, the VCs had maximum autonomy in providing this extra support. The following sub section explores how less-formal supports helped enhance the effectiveness of actual VM implementation.

## 7.3 Additional Support for effective VM implementation

In this study, additional support mainly came from how the VCs communicated with the volunteers throughout their working period. This to a large extent facilitated the actual VM (as well as the making and fulfilling of the VPC). Communication further helped maintain the VOR. The findings showed that different communication approaches led to volunteers' various interpretations of the VM policies and practices (the TSO support). This echoed throughout the VPC making and fulfilment stages. Various means of communication such as interview meetings, telephoning and emailing transmitted multiple layers of information about the role and the VM structure. The outcomes of the communications shaped the work dynamic, as perceived differently by the volunteers (as analysed in section 6.3.2). Through the communication, the VCs provided emotional support and facilitated the development of a friendly and relaxing working environment.

### 7.3.1 Emotional support

The data analysis suggested that the emotional support to maintain volunteer psychological well-being increased the volunteer commitment and engagement level, and prevented the volunteer's early withdrawal. The analysis in the previous chapter

has shown that volunteers all had other commitments alongside their volunteering role. Thus VCs needed to ensure that volunteers enjoyed their role without taking on more stress. The need for clear definition of roles was acknowledged as important by both VCs and volunteers. The nature of the TSOs' work meant that most volunteers had close contact with challenging clients – physically disabled, those with dementia, and elderly in care homes. Many of these clients also had had unfortunate experiences; therefore, the evidence indicated that the volunteers were often emotionally affected.

The recognition of the importance of volunteer psychological well-being was also seen in the establishment of relevant policies to protect the volunteers, clients and the TSO. For example, setting up a boundary was considered to protect the volunteers so that they did not take on more than the role required. Understanding about 'boundary' here also reflected the themes generated from the initial study (see summary no. 8 in appendix 15). However, the boundary concept was most relevant to certain service delivery environments where it was particularly necessary to ensure that volunteers could enjoy and benefit from volunteering. The researcher does not intend to emphasise the necessity of an established boundary policy, but points it out as one signpost to the importance of emotionally supporting volunteers. After all, it is rather difficult to be 'happy' and satisfied if volunteers are stressed by helping others.

All the VCs acknowledged the need for offering the volunteers emotional support, but the different types of support had different impact on the increase of volunteer commitment and engagement. The findings indicated that providing emotional support differently could lead to different outcomes.

The VCs recognised the challenges the volunteers faced. For example, the Day care Centre manager at EL Centre had regular informal conversations with her volunteers throughout the week to make sure that they were happy with the work, and the befriending service was often perceived as a 'lonely' role as those volunteers delivered the service one-to-one with the matched client, outside the TSO premises. The nature of the role thus made the VCs realise the need for emotional support to

protect the volunteers' psychological well-being to prevent the volunteers from withdrawing (echoing the analysis and interview quotes in section 6.3.2).

The VCs at EC Support focussed heavily on ensuring that the concept of boundary was thoroughly understood by all befriending volunteers. The topic was one topic of the monthly focus group. It was thought to protect clients, volunteers, the organisation and the VCs so that concerned groups could all have a balanced life in which volunteer work did not cause other disruption.

> "It was really for the protection of the volunteers themselves, boundaries are important for the volunteers ... so they don't end up taking on the role which isn't their role or taking cause of the nature of the people we work with are very vulnerable and also can easily become very dependent on somebody else because they don't have a lot of support in their life. So it's important for us to make sure that the volunteer isn't doing things that are not normally their befriending role, so they are not trained counsellor, they are not carer, and they shouldn't be doing any personal care.. And also protects the volunteers from any allegations because the vulnerable groups they are working with, there are risks of fears, types of abuse sadly, things like financial abuse and other types, and maintaining boundary such as befriender not having handling cash etc. So it's important for volunteers' safety and clients', I think the boundary policy is quite important."
>
> (Befriending project manager, EC Support)

The VC also provided emotional support indirectly, through facilitating the peer support. This was carried out either through social events or through other platform such as social media channels. For example, there was a private Facebook group for befriending volunteers at EC Support, set up by the project manager. This private online space allowed befriending volunteers to communicate with each other; they were also able to get in touch with the two VCs with all issues concerning the project.

> "Often [befriending] is probably quite a nice thing to do, but sometimes [befriending] can also be a bit isolating thing to do, too. Having the Facebook group for the project is another way for [volunteers] to communicate and interacts around."
>
> (Befriending project assistant, EC Support)

The project manager at Age IT introduced regular social gatherings for all volunteers, and emphasised that she was easy to approach and appreciated volunteers' work.

Such efforts made a positive impact on the successful VPC fulfilment: all her volunteers had a strong interest in their volunteering involvement; and her management style also encouraged her volunteers to have good balance between volunteering and other commitments. This echoed her view that 'the volunteers make the project'.

> "So I've always seen volunteering as a way, when, you know, when you've not got a paid job it's a very good way, not only of keeping your self-esteem and your self-worth up, but a way of showing that you can still be employable and allowing you to sort of have a go at other things, so that people can see that your skill-set is much broader, possibly, than what your experience is.
> …
> Because I had personal experience of volunteering, there's nothing worse than showing that you're willing and then you turn up and nobody really knows what to do with you, because it's not then a very positive experience. And it takes a lot of guts to screw up your courage and go along and say 'I want to help' and then somebody goes 'Oh, oh dear, well we don't really know what we want you to do'."
>
> (Project manager, Age IT)

Despite the above-mentioned positive impact of emotional support, providing such support was also considered as part of the VC's 'duty', through 'small' chats or greetings to the volunteers from time to time. The evidence showed that the number of the chats and the greetings depended on the VC's workload; thus, the busier the VC, the less emotional support of this type was given.

> "I think our duty as well as a Centre to care to volunteers who are coming, there are so many reasons why they volunteer, it's *hard* to be there to *support* every one and their reasons…Because for some it's social interaction, that's a huge part of it [volunteering motives] so you do feel responsible for making sure you're having a communication with them because they don't need to be here, so you feel a *duty* to ask them about their life and they just tell everything."
>
> (Volunteer manager, EL Centre)

The analysis indicated the importance of providing emotional support, but also suggested that this was unlikely to be achieved if the VC did not place the volunteers in the centre of the VM work. Except for the volunteer manager at EL Centre, the support provided by other VCs suggested that these VCs placed their volunteers in

the centre of the VM work, (strongly) believing that the volunteers were an important resource for the TSO performance.

> "…support volunteers which help them to feel more involved and stay longer… that's the core of the organisation, they are the ones delivering the service, if they weren't there, it just wouldn't work, so it's fundamental, so I think it's [volunteer coordination] really important role."
> (Befriending project assistant, EC Support)

Furthermore, *effective* emotional support was more than just small 'chats' ad hoc, even less a 'duty'. Therefore, findings suggested that how the VCs provided emotional support could be seen as an evidence of the VC perceived work focus, the more effective the emotional support, the more volunteer focus.

### 7.3.2 Cultivating a friendly and relaxing volunteering environment

In addition to direct emotional support, the VCs provided additional indirect support through cultivating a comfortable and relaxing working environment. Many volunteers expressed the importance of volunteering in a friendly atmosphere, because they perceived this to help build good relationships with their VCs, other colleagues and clients (matching the analysis in section 6.3.2). The VCs also recognised the importance of creating a friendly environment for volunteers simply because they are an unpaid workforce (see section 1.3.1). For example, the Day-care centre manager at EL Centre considered it important to keep her volunteers happy so that they enjoyed working there. A similar view was also brought out by other VCs, reflecting their attitudes towards their volunteers. Generally speaking, the volunteers felt their VCs were friendly towards them. Overall, VCs and volunteers worked in on mutual respect basis.

> "…well we have other guests that come in, we have potential clients and their families that come in, for the same reason – to see what we're like and to see what the facilities are like and to see if they would like it.  So I kind of think it works both ways – if you want volunteers that are going to be good at their job, you have to make sure that they're going to last and enjoy it.  Because if they don't enjoy it, they don't come back."
> (Day-care Centre manager, EL Centre)

> "…this befriending project exists only through volunteers, so if we don't have our volunteers, we wouldn't have our projects….I think we build up much closer relationship much sooner with the [volunteers]…. we always ask

them at the end of the training if they feel they are confident becoming the befriender now and I said the evaluation sort of questions really we get them to put stickers on whether they feel red if they disagree, green if they agree and amber if it's in between. And if there is any kind of amber then we will raise them as to why they maybe not feeling quite confident in this area for whatever reason…. the volunteer needs to be comfortable and confident in what they are doing."

(Befriending project manager, EC Support)

Among the VCs in this study, the two VCs at EC Support made a particularly positive impact on fulfilling and shaping the VPC continuously. The majority of their volunteers positioned 'themselves' as being in the project team through their narratives (as analysed in section 6.3.2). These two VCs' names were constantly mentioned in relation to how they helped to overcome difficult situations, and how they facilitated volunteer training and development needs. Both of them placed heavy focus on their volunteers.

## 7.4 Factors that influenced VC performance/work

So far, the analysis has looked at the VCs' VM responsibilities. Findings indicated that the effectiveness of actual VM implementation to a large extent depended on how the VCs perceived the benefit of implementation, their work focus and their expectations of the work outcomes. Different external and internal factors were found to influence how the VCs actually carried out VM. The external factors included the CEO's influence, and challenges faced by the VC (such as the diverse roles and responsibilities, as well as insufficient working time). The internal factor was how the VC viewed the volunteer contribution and the need for VM, shaped by her/his demographic background. This section thus looks at these factors in detail, starting with the external factors.

### 7.4.1 External influence: the CEO and the additional roles and responsibilities
### 7.4.1.1 Influence of CEO: Level of autonomy and support given by the CEOs

As the VCs were recruited by the CEOs, the CEO thus influenced how the VCs carried out the VM work. In this study, all the VCs reported that their CEOs were broadly supportive: sponsoring professional training on volunteer management (the volunteer manager at EL Centre), facilitating communication between the VC and

the trustee board (Befriending project manager at EC Support), and paying for the VCs to seek professional counselling service (Befriending project manager at EC Support). The VCs also felt positive about role clarification, and having structured policies and procedures, as these potentially helped them carry out their work more efficiently.

> "[The organisation] is probably one of the well managed one, that I have worked for …our policies and procedures are always very clear, that's been clear from the start. And the CEO does a very good job implementing them within the organisation.
> …
> The CEO just said to me just the other day that he'd like somebody from the befriending to be on the board at the next round of nominations next year."
> (Befriending project manager, EC Support)

The data revealed that the VCs had substantial control over VM implementation (refer to section 7.2); this showed that the CEOs gave them autonomy to carry out their work. The CEOs to some extent 'left' the VCs to do their work without much interference; but this was not always perceived positively by the VCs. Some evidence indicated that the CEO lacked a strong understanding of the challenges faced by the VCs at operational level. This showed a misunderstanding between the senior managers (CEO) and the line manager (VC) as regards the reality of VM work intensity.

> "I'll present them [senior management team and the board of trustees] with my time and how it's divided in quite a clear way. Because I think they're quite guilty of 'oh we could just get a volunteer to do this'. … and not really thinking things through or kind of appreciating how much work is at the other end of that. But I think it's up to me to kind of show that and say 'well it is a huge amount of work'."
> (Volunteer manager, EL Centre)

> "For a while I think [the executive and non-executive boards] thought the volunteers could do the work of the staff [to save cost].  But I think I kind of put them right on that one!  … Volunteers could certainly do some of the tasks staff do, but they can't do all of them by any means."
> (Day-care Centre manager, EL Centre)

Therefore, the data analysis revealed that the CEO influence had a mixed impact on supporting the VC work. Although it was good to give the VC work autonomy, the lack of understanding of their actual VM work led to the increase in their workload. The VCs' extra responsibilities (non VM duties as shown in Chapter Four) added more pressure.

**7.3.1.2 Challenges faced by VC – Diverse roles and responsibilities**
Challenges from having to undertake diverse roles were found in this study. All the VCs were responsible for all aspects of VM including the VM practice (as analysed in section 7.2) and additional support (as shown in section 7.3). And they all reported experiencing a limited amount of contracted hours compared to the amount of work required for VM implementation.

Each VC had additional project management responsibilities as part of their employment contract including managing paid employees (Day-care Centre project Manager at EL Centre). Finally, not all the VCs were employed on a full time contract, adding even more pressure to their effective VM.

> "The biggest thing [challenge] was time. There just wasn't enough time."
> (Volunteer Manager, EL Centre)

> "…we just ran out of time [to carry out monthly volunteer meetings], we just didn't have enough time to do it."
> (Day-care Centre Project manager, EL Centre)

> "…we wouldn't have time to constantly chase up or getting in touch with each volunteer every month and…ask what they've been doing."
> (Befriending project manager, EC Support)

A different kind of challenge came from overcoming the uncertain behaviour of individual volunteers (also mentioned in section 7.2.2). All the VCs reported at least some difficulties in retaining their volunteers for an effective period.

> "So there are some people… in terms of their manner, attitudes, like not getting back to you, but also issues with volunteers who complete all the training, the application, the reference, disclosure everything, and then they dropped out."
> (Befriending project manager, EC Support)

"…once the references came back, I met with them and then did it on a trial basis, showed them the system and then let them do it for a couple of weeks [trial period], and then because I'd already shown them [what to do] and then they were away. So that was a bit hard [for me to spend time on training but they left after the trial period]."

(Volunteer manager, EL Centre)

However, it was unlikely that such behaviour could be entirely avoided (as reviewed in section 1.3.1). Therefore, this finding acknowledged that the role of VC was subject to various pressures. The various ways different VCs perceived these challenges could also make a difference to how they carried out their VM work. Although further analysis showed that the internal factors had the greater impact on forming the VCs' perceptions of volunteer contribution and the need for VC, these external factors also further shaped their perceptions at work, and thus gave rise to different management styles.

### 7.4.2 Internal influence: predisposing factors

The data analysis revealed that certain factors influenced how VCs perceived the volunteer contribution and the need for the VM, particularly their previous experiences in work and as volunteers. The findings showed that all the VCs had different professional backgrounds prior to undertaking their current role. Not all were recruited because of their experience in people management; in fact, the main determinants were project management skills, service related professional skills and experience working in TSOs (as analysed in section 5.2.2). This was mainly because all the VCs were responsible for more than just the VM (as discussed in section 7.3.1.2). The findings showed that those VCs who had had previous VC roles or managerial roles tended to implement VM practices more flexibly to adapt to individual volunteer's situation i.e. Project manager at Age IT, Befriending project manager & assistant at EC Support and Day-care centre manager at EL Centre (interview quotes 7.2 in appendices).

VCs from the three TSOs all had started their roles at an early time when the volunteer roles were being created/the project was being initiated; they all had worked in the sector before. The VC at Age IT did not join the TSO from the start of

the outreach project; but she had been involved in its volunteer recruitment and selection from the beginning as she acted as an external coordinator in recruiting project volunteers. The volunteer manager from EL Centre was recruited under the title of 'volunteer manager', a newly created role; part of her responsibilities was to set up a structured VM framework for the Centre, as a follow-on process of 'centralising' VM.

> "I'm also responsible for encouraging volunteering at the Centre, and you know, everything that goes with that. So, you know, putting in place policies and procedures and working out rotas and who's doing what and things like that. So in January last year I started a qualification in volunteer management at the Volunteer Development Scotland in Stirling.
> …
> Because it [volunteer management] wasn't centralised, it was very kind of ad hoc, the volunteering that was done here, there was no kind of systematic, there was no database … So they wanted to get better organised and when I started the idea was that that would be part of my role as well. So that was tagged on to the role description when I applied for the job."
>
> (Volunteer manager, EL Centre)

The EC Support VC joined the TSO as the Befriending project manager after it had been running for over two years. There were already VM policies and practices in place. However, the CEO involved her in reviewing and improving the existing structures. Therefore, new practices were introduced to better support volunteers, such as monthly social event and focus groups. As the project manager, she had increased autonomy in reviewing and introducing new VM activities (as discussed in 7.2.2).

Furthermore, the analysis showed that the VCs who had had experience as volunteers themselves gave more additional support (section 7.3), and their support was positively perceived by the volunteers (contributing to the VPC fulfilment as analysed in section 6.3.2). The VCs from Age IT and EC Support had both been volunteers. This led them to see the importance of effectively managing the volunteer workforce. They had also gained an experience of coordinating other volunteers. Therefore, this 'double effect' of being a volunteer while managing the volunteer workforce shaped their view of the benefit of effective VM, which had a positive impact on their managing volunteers as professional (paid) VCs.

"Because I had personal experience of volunteering, there's nothing worse than showing that you're willing and then you turn up and nobody really knows what to do with you, because it's not then a very positive experience. And it takes a lot of guts to screw up your courage and go along and say 'I want to help' and then somebody goes 'Oh, oh dear, well we don't really know what we want you to do'."

(Project manager, Age IT)

"I started off managing volunteers as a volunteer first of all, as a volunteer officer with BTCV Scotland, British Trust for Conservation Volunteers where I was taking out groups of volunteers to community to do conservation work once a week."

(Befriending project manager, EC Support)

"I was certainly involved in, really wasn't at that point, wasn't a formal organisation. But it was a group of guys who got together in the 1980s, really to set up, childcare, to run crèches for events, like where an event is taking place and people with kids coming along, and we will run a crèche for that event because it was the work we'd like to do and we thought it was good for more men to be involved in that sort of thing. So that was voluntary work, we didn't get paid for it, it wasn't really an external organisation where we were doing for, we just decided this is what we wanted to do, we organised ourselves."

(Befriending project assistant, EC Support)

### 7.4.3 Section summary

This section looked at the external and internal factors which determined how the VCs implemented VM. The VCs had to ensure that TSO expectations were met, thus, they needed to make sure that the outcome of VPC fulfilment would add value to the TSO performance. The findings revealed that influenced by these factors the VCs adopted different management styles, hence leading to different implementation outcomes. Furthermore, the data analysis suggested that VCs' predisposing factors, particularly their previous volunteering experience, shaped their perception of the volunteer contribution, and thus made them focus more on effectively supporting volunteers. The VCs were unlikely to have had such a good understanding of 'real' volunteer needs without personal volunteering experience. Instead, they would have perceived the role of VC to be fairly standard managerial role, mainly requiring them to implement established policies and practices. But because they had seen

volunteering from a different side, different VC management styles were applied, resulting in different degrees of the effectiveness of the VM implementation. The following sections therefore looks at the VC management styles found in this study.

## 7.5 VC management styles

### 7.5.1 Overview

The data analysis suggested two broadly-categorised management styles among the VCs, that is, volunteer-centred and task-centred. These two styles led to different VM outcomes. The findings also indicated that the different management styles also influenced how the benefit of VM was perceived by the CEOs and volunteers. Table 7.1 below summarises the key characteristics of the two styles, as shown in the actual VM the VCs carried out, and its effect on engaging and retaining volunteers. The task-centred style focussed on ensuring smooth task completion, with less concern for the individual volunteer. The volunteers managed under this style thus concentrated more on completing the work they had been assigned, with little intention of extending their commitment into other tasks (as analysed in section 6.3). The volunteer-centred style, on the contrary, placed the volunteers at the centre, and those VCs looked after their volunteers' psychological well-being and made sure their volunteers were 'satisfied' and 'happy' during their volunteering participation. They provided support to help individuals in addition to merely following the established VM procedures. Categorising the management styles was not intended to create specific criteria to judge 'good' or 'bad' VCs; it was used to present the importance of the VC's role in effectively engaging and retaining volunteers.

Table 7.1 Key characteristics of VC management styles

| VC management style | Task centred | Volunteer centred |
|---|---|---|
| **Management Focus** | Volunteer role/tasks; established VM structures | Volunteers |
| **Approaches to VM implementation** | Inflexible and fixed to written guidance and procedures regardless of situation | Flexible to suit individual circumstances, follow the framework but not bound by details. |
| **Volunteer review/feedback** | Formal but irregular (tend to subordinate review meeting to other work), group based meeting focusing on work related issues, few concerns about volunteer satisfaction | Regular formal one-to-one meeting, with informal communication in between. Focus on volunteer satisfaction and self-development |
| **Other volunteer support** | Limited support for non-work related issues, consider informal conversation with volunteers as a duty/contracted job | . Driven by management focus, pay close attention to volunteer psychological well-being; . Support volunteer self-development |
| **Implementation outcomes influenced by VC management styles (informed by the findings)** | . Volunteer commitment remains at task completion level; . No desire to take initiatives in other organisational activities or increase work commitment e.g. taking more shifts . Pay little intention to the TSO performance and development | . Volunteer expectations shaped to contribute more to the organisation, to benefit to personal development; . Increase in work commitment e.g. taking more shifts . Pay more attention to the TSO/project development, take initiatives to help e.g. fundraising; . Promote the TSO and recruit new volunteers for the organisation/project |

## 7.5.2 Approaches to the actual VM implementation

The task-centred style was found to develop a mechanical approach to VM practices; this was referred as a 'ticking box' mentality. The VCs with this style focused more on making sure all VM activities were carried out as written in the policy document, while overlooking specific circumstances. For example, the following narratives (paraphrased by the researcher) recounted a situation experienced by the volunteer manager at EL Centre. She described this intending to express the difficulty of satisfying the volunteers through 'efficient' VM implementation. But the case

actually indicated that she applied a task centred VM style to managing her volunteers, and partly explained why she felt pressured to deliver effective VM, as described in the analysis in the previous chapter and the previous sections of this chapter.

> 'There was a computer engineer who agreed to offer ad hoc help to develop software to systematically manage the volunteer database, but he was unable to provide regular commitment due to his paid work commitment. In addition, it was mutually agreed that the gentleman's help would finish once the software was developed (a short period volunteering participation). But the volunteer manager still required him to go through the standard recruitment and selection procedure including obtaining references. This has led to some resistance from the engineer as he felt unnecessary to go through these procedures since it was only for a short period.'
>
> (Re-structured narratives by the researcher)

This situation indicated rigidness in the VM implementation. Although the VM structure helped standardise the process, overemphasis on the instrumental implementation could be negatively perceived by some volunteers (as in this case), hence these volunteers might not feel happy or satisfied (indicating unsuccessful VPC fulfilment). The task-centred style made it look like the VC's work was just 'ticking the box'.

Rigidly implementing all established VM practices was time consuming. Thus, the findings indicated that the VC with this style constantly faced difficulties influenced by the external factors (analysed in section 7.3.1). The reality became 'the more established the VM was, the more difficult for the VCs to effectively manage their volunteers'. As a result, the data showed the VC with the task centred style complained about the limited time for supporting the volunteers through 'thorough' VM implementation. Consequently, the VC had to 'prioritise' the workload to undertake all her/his responsibilities; support for the volunteers often became less important than the task.

> "How to divide your time was really, really difficult…we offer our supervision in meetings, because it's a time factor. We can't meet everyone one to one and give them an hour a month. It's just not possible."
>
> (Volunteer manager, EL Centre)

"75% of my time is administration, funding, papers…and then the other 25% is just coming up with some new ideas, keeping things fresh. … They [policies] are there because you obviously have to have them. Some of it is legally [required], you have to have them. And also depending on the funder..."

(CEO [from the perspective of the VC for IT class volunteers], Age IT)

On the contrary, the volunteer centred style was more flexible in implementing the practices. By focussing on individual volunteers, these VCs took into consideration an individual volunteer's circumstances during the actual VM; these considerations led to an adaptable approach. They were not fixed to the written instructions when carrying out the actual VM work, although they recognised the need to have formal VM structure (see section 7.2). The impact of the volunteer centred management style showed in the data analysis (Chapter Six and the previous sections in this chapter). Acting as the volunteer line manager, the VCs' management style shaped their volunteers' view and attitudes at work. If the volunteers perceived their VC's work (support) positively, their 'primary' volunteering motives and expectations were then met (the individual VPC fulfilment) and shaped to enhance their engagement to the TSO. Therefore, the TSO benefited from an engaged volunteer workforce (see section 6.3.3).

### 7.5.3 The impact of the actual VM on engaging and retaining volunteers

The findings showed that these two management styles had different outcomes as regards engaging and retaining volunteers. The main differences in the implementation outcome were shown on the extent of volunteer involvement both at the local level (task/project) and wider level (organisation-wide or beyond). As discussed in Chapter Six, engaged volunteers tended to go beyond a simple VPC fulfilment i.e. completing given work. The findings showed that these volunteers extended their involvement in the organisation. Some took on more shifts to increase workload, while others initiated extra activities to help the organisation such as fundraising and recruiting new volunteers (promoting the volunteering role through word of mouth).

As discussed in Chapter Two, there is no established legal framework to manage volunteers within TSOs. VCs thus have to manage and support volunteers under the TSO's own VM framework. Analysis in Chapter Six indicated that individuals' fulfilling VPC through 'reliance' did not always lead to positive impact on TSO performance. However, the VCs' management style seemed to influence the outcome of VM implementation to various extents, particularly by providing support to ensure the effectiveness of volunteers' performance, to protect the volunteers' psychological well-being, and to facilitate the volunteers' personal/career development (as discussed in sections 7.2 and 7.3). Evidence revealed that supporting volunteer psychological well-being and development positively shaped volunteers' perception of volunteerism and the level of support they received from the TSO, hence eliciting more contribution to the TSO beyond their volunteering roles (as analysed in section 6.3)

The findings indicated that the two management styles handled the VM of review/feedback rather differently: in conducting the review meetings (one-to-one for volunteer centred style, and group meeting for task-centred style), meeting frequency (the volunteer-centred VCs had regular review meetings, while the task-centred VCs arranged the review meeting subject to availability) and meeting agenda (the volunteer centred VCs focussed on the volunteers' development, while the task centred VCs talked more about improving work output). Evidence further showed that the task-centred style did not consider such meetings to be crucial, as they could be 'pushed aside' when the workload increased. The data showed that the focus of the meeting was not on volunteer development but on work related topics which merely reflected the volunteer 'supervision' side of the VC responsibilities (as analysed in section 7.3.1).

The volunteer centred VCs perceived review meetings to be important (as part of VM implementation). In addition to finding out how volunteers' had performed, these VCs particularly made sure the volunteers also benefited from the work. Alongside the individual review, informal communication was also conducted through various forms including regular social gatherings for volunteers. These activities were all to support volunteer psychological well-being, hence to maximise

their enjoyment from volunteering. Such purpose showed that these VCs did recognise the importance of the volunteer contribution to the TSO performance, supporting the argument that the volunteer workforce creates competitive advantages for the TSO (as reviewed in section 2.3).

> "This befriending project exists only through volunteers, so if we don't have our volunteers, we wouldn't have our projects. And there are occasional volunteers to help with class, because classes are mainly quite small groups, so usually it's mainly just enough to have group leader there. But yeah, befriending project only sustained because of the valuable volunteering."
>
> (Befriending Project manager, EC Support)

Evidence indicated that task centred VC provided volunteer support according to the roles. There was an assumption that less able people should get more support. This approach was unlikely to ensure all volunteers received an equal amount of support from the VCs.

> "It's people who maybe need a wee bit more support. There's retired, but only maybe a couple, only 2 or 3, are retired. The rest are people who are, you know, maybe have worked in a café before but it's been supported employment kind of situation. So they may be people with learning difficulties or they've just been unemployed for a long time."
>
> (Volunteer manager, EL Centre)

### 7.5.4 Section summary

This section considered how the VCs actually implemented the VM policies and practices. Their work indicated two different management styles: the volunteer centred and task centred. The volunteer-centred style had a more positive impact on attracting and retaining volunteers through engaging them to the organisation. By placing the volunteers in the centre of the VC's work, the actual VM became more flexible. In contrast, the task-centred style paid less attention to the volunteers, and the actual VM was carried out by instrumentally implementing the VM practices. Although the individual VPC was still fulfilled under this (not really due to the VC's work as analysed in section 6.3.2), less impact was made on engaging the volunteers to contribute to the TSO performance beyond their volunteering work. In this case, the volunteers were less likely to see formally established VM policies and practices

as valuable in supporting them; hence these volunteers were only committed to the arranged work.

## 7.6 Chapter summary and conclusion

This chapter focused on the VC perspective of the VM implementation and its outcome. It looked at the final process of VM implementation following from the VPC fulfilment as shown on the conceptual framework (figure 2.4). The implementation outcomes had varying effectiveness as regards retaining and engaging volunteers, and the level of this effectiveness contributed to the TSO human resources (as shown in the framework). This supported the view that the VPC fulfilment benefited volunteers at individual level, but this fulfilment did not automatically lead to the engagement to the TSO (refer to figure 2.4). The volunteer-centred VCs could prolong the influence to add more value to the volunteers' and the TSOs' performance, truly realising the 'reciprocity' mentioned in the theoretical debate (the Psychological Contract Theory reviewed in Chapter Two). An unstable volunteer workforce caused by high level of volunteer turnover not only affected the overall quality of the task completion, it also reduced the efficiency of the actual VM. Where volunteers deliver crucial services, an unstable volunteer workforce would negatively affect the quality of service delivery, hence affecting funding renewal.

The VCs fulfilled the VPC through implementing different VM practices, from recruitment and selection to volunteer feedback/review. But the outcome of the implementation was most heavily influenced by *how* VM implementation was actually carried out by the VCs. The data analysis showed that their attitudes and views of the VC responsibility made the greatest impact on the outcomes, and hence, on the extent to which the VPCs were kept ongoing. This chapter considered how the VCs perceived the value of VM and volunteer contributions to their TSO, how they implemented different VM practices, and the influence of their approaches on the implementation.

The findings showed two general VC's management styles– task-centred and volunteer-centred. The two styles were based on the VCs' perceptions of the need for

VM, and were shaped by their demographic backgrounds (predisposing factors). Evidence suggested that the CEO's management style also influenced the VCs' styles, echoing the findings in Chapter Five. Broadly speaking, a better implementation outcome came from a volunteer-centred style. The task-centred style was found less likely to engage and retain the volunteers. The former style reflected a flexible approach to VM implementation, paying attention to each *individual* volunteer's need, while the latter focussed more on following established procedures with less consideration for an individual volunteer's need. In this study, the VC adopting a task-centred style reported constant challenges of finding time to carry out VM activities such as regular review meetings.  Thus the actual VM resulted in inconsistent support for the volunteers, and a more static VPC process.

Relevant literature (discussed in section 2.5) acknowledges the importance of the VC's role as volunteer line manager. The data analysis went beyond the existing argument, indicating that the VCs played a substantial role in engaging and retaining volunteers. This in turn was considered to contribute positively to the TSO performance at a broader level. In this study, the role of the VC was particularly crucial to retaining volunteers, and the data analysis suggested this was achieved by the VCs through shaping and reshaping individual volunteers' expectations. This VC approach also ensured that the process of VPC making and fulfilling was an ongoing activity, and it resulted in sustaining volunteers' contribution to the TSO (as shown in the previous chapter). Through adjusting volunteers' 'primary' motives and expectations, the VCs influenced how the volunteers interpreted/reinterpreted TSO expectations alongside their volunteering participation. Thus, the volunteers stayed with their TSO through ongoing VPC making and fulfilment.

The results also confirmed the importance of the VC's work on the effectiveness of the implementation outcome. The role of VCs entailed full responsibility for managing and supporting volunteers. As the volunteer line managers, their perception of the volunteer contribution and need for VM, and their actual VM execution had a heavy impact on the level of volunteer engagement and retention. The findings showed that the VCs had to supervise and support their volunteers to

ensure both the TSO's and the volunteer's expectations being met. By recognising that the volunteer workforce gave competitive advantages to the TSO, the volunteer-centred management style could thus facilitate good VOR, meeting both parties' (TSO and volunteer) expectations (outcome of making and fulfilling the VPC). Although challenging, the role of VC was also crucial to manage this special workforce for the TSO.

# CHAPTER EIGHT: Discussion and Conclusions

## 8.1 Overview

Focussing on the VM within the three Scottish small to medium TSOs, this research offers empirical evidence to understand different factors influencing the effectiveness of strategic VM. The overarching research question was 'in what ways does the processes of making and fulfilling volunteer psychological contract (VPC) contribute to effective outcomes of strategic volunteer management (VM) practices?' Addressing this was approached by the following detailed questions:

1. How do TSOs make their 'promises' to attract volunteers? How does CEO perception influence VM planning? What other factors influence VM planning?
2. How do volunteers 'accept' TSO 'promises'? What are the factors influencing their decisions on 'acceptance'?
3. How are volunteer psychological contracts fulfilled?
4. What role do volunteer coordinators (VCs) play? How can VCs ensure satisfactory VM outcomes through effective VM implementation?

To answer these research questions, the analysis was carried out under the guidance of the conceptual framework (figure 2.4), reflected in the analysis structure (table 4.2). As expected, the framework proved useful in exploring the research topic by linking strategic VM to VPC. The three analysis chapters together (Chapter Five, Six, and Seven) presented the whole process of strategic VM planning and implementation including the key outcome of volunteer engagement and retention. Analysis in Chapter Five pertained to research question One; Chapter Six dealt with research questions Two and Three; while Chapter Seven focussed on question Four. Together, the three chapters set out a complete process of VM planning and implementation, and included further considerations of the impact of effective VM planning and implementation outcomes. The VC management styles that emerged have mainly served to make clear the complex nature of managing volunteers and the challenges which TSO face, as well as the potential benefits of effectively managing the volunteer workforce, particularly as regards increased engagement and retention.

The study findings also reveal the challenges for the TSO managers due to a high level of heterogeneity in terms of tasks, organisation sizes, unbalanced financial and human resources, diversity in job arrangements, and individuals' behaviour in the workplace. In this final chapter, the first part offers conclusions of the study findings, followed by considerations of contributions of the research from different aspects: theoretical, practical and methodological. The chapter ends with the researcher's reflections and suggestions for future studies.

## 8.2 Conclusions

### 8.2.1 Overview of the finding

The high demand for the volunteer participation in small to medium TSOs shows that the volunteer workforce is regarded as an important human resource to sustain TSO performance. However, this study reveals that the CEOs and the VCs had a mixed view of the workforce's competitive advantage. The TSOs in the study expected their volunteers to increase their commitment to the core TSO activities, particularly those who deliver crucial services to target client groups. Such expectation indicates that the volunteer workforce has become more integrated into the TSO. This thus shows the strategic importance of the volunteer workforce in improving the TSO performance, hence the need to retain trained volunteers. The claim that the volunteer workforce is particularly important for small to medium TSOs reflects the argument in HRM that human resource is an important asset to an organisation (Boxall 1996; Cuskelly et al. 2006; Hay et al. 2001; Legge 2005), as a competitive resource for these TSOs (from the RBV perspectives). The study suggests that volunteer participation does not serve a mere cost saving purpose; and that the TSOs' managers in the study do not fully recognise the full strategic importance of the volunteer workforce. The lack of such recognition tends to have a negative impact on the effectiveness of actual VM.

From the perspectives of strategic HRM (SHRM), this study substantially confirms that the outcome of the actual VM relies on the extent to which the CEOs and VCs

align managing volunteer-organisation relations (VOR) to the strategic needs of the TSO to develop further through the volunteer involved activities. This reflects a core claim of SHRM — explaining 'the relationship between strategic management and employment relations' (Boxall 1992, cited in Boxall 1996, 62). This reflection also supports the debate that the volunteers' perception of VM is influenced by the VCs' own perceptions (echoing Woodrow and Guest 2014), such influence in turn can have an impact on the effectiveness of the actual VM. The strategic management element refers to how CEOs carry out the VM planning, as demonstrated in the findings (Chapter Five). Their perception of the volunteer contribution and the need for VM to a large extent has an effect on the recruitment of the suitable volunteers and VCs, and on the establishment of the VM policies and practices. This study indicates that the VOR is crucial to realising TSO's and volunteers' expectations through the actual VM executed by the VCs. The finding supports the claim that the more effective the actual VM, the better engaged the volunteer workforce, hence the longer its retention. The study reveals the complexity of managing VOR (Chapter Six), and thus shows the important influence that the VCs (as the volunteers' line managers) have on the VM they carry out (Chapter Seven).

Looking at the management of the VOR, the study confirms the claim that the individuals' (CEOs', VCs' and volunteers') perceptions have a crucial influence on forming the VOR, through the making and fulfilment of the VPC (as shown in table 4.2). External and internal factors identified through data analysis form and shape individual perception of the volunteer value and the need for VM. From SHRM perspectives, a CEO's VM planning activities could only be considered strategic if that CEO perceives the importance of the volunteer workforce and promotes this view in the VM planning, regarding support for the volunteer workforce as the centre of any VM.

By understanding the process of VM with the VPC making and fulfilment embedded, the study demonstrates the important influence of individual perception on the effectiveness of the VM, particularly the influence of CEO and VC on achieving effective outcomes through their actual VM planning and implementation. The

success of the actual outcome thus enables a TSO to enhance its performance by attracting, engaging and retaining volunteers. Well-established (formal) VM policies and practices are necessary for a TSO to benefit from the volunteer contribution; but the specific VM implemented by VCs makes real impact on a TSO's performance (echoing the debate of Woodrow and Guest 2014).

From the perspectives of managing the volunteer workforce, the finding indicates that competent VCs (line managers of volunteers) are essential to ensure efficient and effective outcomes, and such outcomes have a positive impact on keeping a good VOR, hence benefiting the TSO performance (Cunningham and Hyman 1995; Gilbert, De Winne, and Sels 2011b; Purcell and Hutchinson 2007). The study shows that the CEOs and VCs need to synchronise the volunteers' expectations to match the TSO objectives in order to create a synergy among the volunteer workforce, because of the heterogeneity of the volunteering motives and expectations. The VCs implement the VM and practices, aiming to realise the *intended* VM. However, the VC's *actual* VM outcomes might not be the same as those intended. In this study, two main management styles were observed, each with an impact on engaging and retaining volunteers. The finding indicates that the VCs' management styles are influenced by what they think most important in VM, being shaped by their own values and beliefs.

Acknowledging that TSOs can benefit from effectively managing their volunteer workforce suggests the pressing need for improving CEOs' and VCs' people management skills and knowledge. This study presents the challenges in effectively managing volunteer workforce within TSOs (Kong 2008); hence highlighting an important argument that competent TSO managers are crucial to strategically manage the volunteer workforce to sustain TSO performance in the long run (Kong 2008; Kong 2007; Powell 2001). The VCs are required to carry out the work as professional line managers. But more importantly, VCs can only be fully effective if they focus on meeting the volunteer's needs and expectations (volunteer-centred VC style). In implementing the VM practices, the volunteers should be considered as the centre of the VM, hence the VCs should place an emphasis on meeting their

expectations and need for personal development. This VM approach would likely lead to a more engaged and longer-serving volunteer workforce. The finding offers evidence to show that this volunteer-centred VM approach effectively engages the volunteers, thus enhancing the TSO performance.

### 8.2.2 The impact of VPC on strategically managing volunteers

The psychological contract focuses on the micro-level of organisation, i.e. individuals within organisation (Rousseau 1995). From RBV perspectives of HRM, understanding the contract making and fulfilment is thought to start a conversation about the individual influence on organisational development. A volunteer workforce, and its management, tend to be uniquely free from legal constraints such as labour laws and HRM regulations; this could enable TSO managers (CEO and VC) to ground their VM planning and implementation activities into an expectation of fulfilling volunteers' expectations and needs (the diversity of individual motives and expectations is reviewed in section 1.3, Chapter One).

The results indicate that not only would volunteers benefit, TSOs would also spontaneously benefit from effective VM. From the theoretical perspectives of the Psychological Contract, successfully making and fulfilling the contract is likely to achieve a reciprocal benefit to both contract makers, in this case a volunteering individual and the organisation. The researcher argues that the CEO and VC are likely to adopt a strategic approach to VM if they understand this connection. As a result, the process of VM thus can be strategic for a TSO, with possible positive reciprocal benefits.

An evolving landscape in the third sector over the years has led to changes in how individuals perceive the volunteering role, especially as regards self-fulfilment and/or self-development. This has created diverse volunteer profiles with multiple volunteering motives and expectations. The study's volunteer subjects exhibit diverse behaviour within their TSOs, intertwining both the desire to create a unique volunteering identity and to fulfil development needs (refer to section 6.3 in Chapter Six) (Finkelstein and Penner 2004). Volunteers are no longer just 'someone nice to

have' for TSOs, but could be a crucial workforce who not only add value to the smooth and stable operation, but also help to promote the TSO's social value and sustain its performance from a long term perspective.

**8.2.3 CEO as strategic VM planner – understanding the competitive advantages of the volunteer workforce**

CEOs are considered to be responsible for planning the TSO's operation strategies. They tend to influence the development of organisational culture and structure, depending on the extent to which they share beliefs and values with the organisational objectives (Wilensky and Hansen 2001). The findings of this study to a large extent confirm the above claim, as the CEOs in the study influenced how VM policies and practices were planned and implemented. However, not all of the CEOs' VM planning activities would be considered strategic; this would only be the case when CEOs recognise that volunteers are competitive resources carrying out TSO core activities (RBV perspective as discussed in section 2.3 in Chapter Two), and apply this view to guide their decision makings in VM planning. CEOs are argued to face dual responsibilities in keeping their balance between 'business and personnel requirements with a spiritual mission' (Wilensky and Hansen 2001). CEOs who are responding to the demand to run their charities in a business-like fashion are likely to adopt a structure to create the image of a TSO which has undergone necessary changes to become a charity *business*. However, an approach to VM that puts little emphasis on adapting policies and practices to suit individual organisational needs, and gives little consideration of what the volunteers in the organisation want, is unlikely to be regarded as strategic (such as the CEO at EL Centre).

The view that effective VM has a positive impact on the TSO performance implies that human resource is an important asset to an organisation, reflecting an interview quote of the CEO of EC Support: "you look after the people, and the people will look after the machine for you". This view echoes the core argument of the role of strategic VM on the TSO development in this study, as volunteers are perceived to be a key workforce to TSO performance, thus should be utilised strategically instead of using them symbolically. Being an important resource, the volunteers carry dual

responsibilities, balancing helping TSOs with their business development and helping them to achieve social value; this is an extended reflection of the CEO's dual responsibilities (Wilensky and Hansen 2001). It highlights the fact that volunteer involvement should be developed based on mutual benefit, as volunteers are not the only ones who benefit from volunteering work, and it is necessary for TSOs to manage and support volunteers to benefit themselves as well. This argument is supported by the data collected from interviewing CEOs, VCs and even some volunteers. Analysis of these data was based on an extended understanding on the role of strategically planning and implementing VM, helping to answer research question no. 4.

From a strategic management perspective, the CEO is the main strategic planner, and a CEO's work is to develop strategies to ensure a long term organisational development. However, the results show that there is still a limited level of acknowledgement among CEOs on the importance of people to TSOs. This also reflects some arguments in existing literature (Cuskelly et al. 2006; T. Taylor and McGraw 2006). In the context of managing volunteers, the recognition of their value is still associated with the social aspect of contribution, with little sense of seeing volunteers as important source of workforce which also enhances TSO productivity.

### 8.2.4 The VC as volunteer line manager – responsible for fulfilling and shaping volunteer expectations

The role of the VC is thus undoubtedly crucial to ensure effective VM. The study findings confirmed the high level of VC involvement throughout the VM implementation from the start of volunteer engaging to the role to the end of the volunteering period. This study further highlights that, depending on each TSO's organisational structure, VCs can assume a wide range of responsibilities and sometimes have a high level of autonomy in VM planning and implementing (see Chapter Seven) (Lishman and Wardell 1998). The results show that the VCs from small to medium TSOs naturally assume the HRM responsibilities. They play a crucial role in influencing how much the contract is fulfilled and what impact this has on volunteers' experience and TSO performance (Purcell et al. 2003). The results

show that the VC's work can also shape the *nature* of the VPC. Although there were relational contract terms set up across the studied TSOs (shown as the VM practices such as training and performance review), the actual implementation under task-centred VC management style indicates that these relational terms were fulfilled in a transactional manner – that the performance review meeting was conducted ad hoc, and that informal communication became a "duty" towards the volunteers (as analysed in Chapter Seven). Thus, the outcome of the actual VM is seen to be influenced by the VC's work/performance (Guest 1987).

This argument is also valid in understanding what the findings show about the influence of VC management style. Considering VM practice styles, it appears that 'soft' practices are more suitable to manage and support volunteers. This is thought to be the case from both the nature of volunteering work (see section 2.2.1) and the theoretical debate on 'soft' HR practices (Legge 2005). Acting as line manager for volunteers, the VCs' work style is important to attract and retain suitable volunteers. Because the VC represents the TSO in the eyes of volunteers, the VCs are expected by their CEOs to communicate TSO expectations clearly; while the volunteers also view how the VC manages and supports them as the TSO's intention. This finding echoes the claim that line manager's management styles are often perceived by employees to be reflections of the organisation (Frank, Finnegan, and Taylor 2004; Purcell and Hutchinson 2007; Gilbert, De Winne, and Sels 2011).

It is further concluded that the process of making and fulfilling the VPC should be an on-going activity. The relationship between volunteers and the TSO does not end upon VPC fulfilment. Furthermore, it is considered a natural outcome that the contract is constantly violated and re-made during the volunteering. The VPC is seen to exist through fulfilment, violation and reformation so long as the relationship between two contract makers remains (Conway and Briner 2005; Rousseau and Robinson 1994). Thus, the contract violation becomes necessary to *sustain* a (working) relationship. The VPC violation might not always lead to negative outcome such as volunteering withdrawal; the contract violation could also be necessary to strengthen or further VOR in different situations, echoing an early

argument raised by Rousseau and Robinson (1994). This happened in this study when individual initial motives and expectations were shaped under the influence of their VC's support (see Chapter Six). Thus, effective VM implementation (by the VCs) can lead to positive outcome of the on-going process of the VPC.

### 8.2.5 Achieving effective VM implementation with considerations of contextual influences

The study suggests that established VM policies and practices are essential to ensure the implementation outcome —actual VM. However, not only is actual VM found to be heavily influenced by VC management style; it is also affected by TSOs' organisational culture and structure. The latter is often shaped by TSO managers' perception (CEOs and middle-level managers) (Wilensky and Hansen 2001). The study findings demonstrate the influence of perceptions on VM planning and implementation. Previous studies tend to encourage TSOs to set up formal VM structure in response to the pressure of managing people more formally within the sector (Taylor and McGraw 2006), which led to 'professionalization' of management of TSO from different aspects (Carey, Braunack-Mayer, and Barraket 2009); but little evidence is given to demonstrate the importance of CEO and VC applying a strategic approach to planning and implementing VM (e.g. Gaskin 2003; Baines 2004; Kim et al. 2010; Bowman 2009; Taylor et al. 2006; Leonard et al. 2004; Farmer and Fedor 1999; Hustinx and Handy 2009).

The competence of the VC, and formal VM policies and practices, are two important ingredients of the VM professionalization. According to this study, this is most likely achieved by the VCs' effectiveness in implementing established policies and practices. From theoretical HRM perspectives, influence of VC management style on actual VM echoes a debate over the link between HRM and organisational performance (Boselie, Dietz, and Boon 2005; Woodrow and Guest 2014). The findings further stress that merely adopting 'best VM practices' or a 'VM working model' does not lead to actual outcomes as intended (Briggs and Keogh 1999). The VCs are responsible for real-life implementation, and their work influences the

effectiveness of the actual VM as discussed in Chapter Seven (reflecting the argument by Woodrow and Guest 2014).

The explanation of 'professionalization' in previous studies tend to focus more on 'formalising' VM structure (referred as 'standardisation' by EL Centre's CEO), but this does not sufficiently give weight to the VC's competence in effectively managing volunteers[22]. 'Formalisation' is regarded as the setting up of VM structures according to intended outcomes, but little attention is given to how VCs shape actual outcomes. Actual outcomes are influenced by VC management styles and volunteers' views & attitudes towards volunteering and VM. This finding supports the claim that there is no 'best practice' or 'best working model'. A VC's work styles/focus can make the actual VM outcome different from what was intended – either more effective or less (Woodrow and Guest 2014).

In this study, organisational (contextual) factors are also found to have an impact on effective VM outcomes. These factors include organisational culture/work dynamic and organisational structures. Both are found to reflect CEOs' perception and their work belief. Their expectation/perception of their work has an impact on how VM is planned and what intended outcome to have. This echoes the argument by Wilensky and Hansen (2001) that TSO CEOs' perception/belief shapes their organisational culture and structure. According to this study, high level of autonomy in organisational operation indicates that CEOs' expectation can shape how structure is designed and what kind of managers and employees are required for their TSOs. In terms of VM establishment, its policies and practices are also introduced under the influence of organisational structure and its CEO's expectations (as analysed in section 5.3.3.2). The study revealed EC Support and EL Centre both had formally established VM policies and practices in place, yet the outcomes of VM implementation varied due to different VC working styles i.e. volunteer-centred and task-centred styles respectively. This is also a reflection of their CEOs' expectations and working style to some extent (as analysed in section 5.3 and 7.4.1.1).

The findings of actual VM outcomes of these three TSOs actually reflect each of the TSO's culture, structure and in particular its CEO's expectations of volunteering contribution. Therefore, the influence of organisational (contextual) factors cannot be ignored, particularly because a TSO's culture and its structure are to a large extent influenced by its CEO's perception and work beliefs (Wilensky and Hansen 2001). This view further indicates that so called 'universal' approach to run a TSO or any type of organisation does not really exist.

## 8.3 Contributions of the Study

### 8.3.1 Reflections on applying the conceptual framework (figure 2.4)

Broadly speaking, the conceptual framework displayed the whole VM process, and it also enabled the integration of VPC stages into the VM process as discussed in section 8.1. The study largely confirms that this conceptual framework can be useful in evaluating a strategic decision outcome by exploring its process of planning and implementation. This framework is further helpful in understanding individual perception influence in the outcomes of a strategy planning and implementation as it reflects key players' (intangible) thinking process of reaching a decision and carrying out its implementation. From this perspective, this framework can be applicable to a wider range of planning and implementation decision-making processes.

### 8.3.2 Theoretical contributions

The findings are considered to have independent contributions to further understanding two theoretical concepts — the Psychological Contract Theory and extended understandings of HRM/VM - performance/outcomes, in addition to the contribution of the two integrated. This sub-section considers the three stated contributions.

***Contributions to the Psychological Contract Theory***

Informed by this study, the Psychological Contract Theory is thought to be a useful applied theory, ideal to guide academic research towards understanding how a relationship between people is built and managed. Furthermore, the theory is useful to explore the impact of people relationships on organisational performance/development. Exploring the psychological contract process discloses

the individual's cognitive process; it translates implicit internal (thinking) activities into explicit processes. This study findings propose that the theoretical focus on the psychological contract should be shifted from measuring the 'end product' (type of the contract and its terms, impact of the contract violation) to studying it as a (continuous) process, supporting the argument raised by Conway and Briner (2005). More attention should be on how this theory can be applied to understand implicit concepts (such as cognitive processes) than what terms (should) consist of a psychological contract. Its application is considered to go beyond the boundary of organisation studies as it highlights *individual* perception influence on outcomes of making and fulfilling psychological contracts. Its key arguments can guide researchers to better understand the impact of different types of people relationships within different contexts.

This study further shows that fulfilling a psychological contract can only make an impact on the individual's work satisfaction in the short term, provided the work arrangement remaining *unchanged*. Yet this satisfaction does not always lead to individual engagement and retention in the long run. The relationship exists through their entire work participation; *changes* are bound to happen to individuals as they go through different life stages/development stages throughout their working life. Therefore, even doing the same work within one organisation, an individual is likely go through several psychological contracts by continuously making, fulfilling, violating, remaking and fulfilling these contracts (Rousseau and Robinson 1994); for example, new psychological contract is needed when an individual has different colleagues/managers to work with, or existing contract needs shaped if changes happen within one's organisation.

Understanding the psychological contract as a process of building and maintaining people relationship helps explain why individual relationships vary even within the same (collective) working relationship. Therefore, this study offers an in-depth view to understand the theoretical value of the psychological contract; it to some extent challenges the traditional view of the Psychological Contract Theory in terms of focussing more on the types of the contract (terms) – accepting the outcome of

making one psychological contract and assuming it to last through one's work. This study, however, does not reject the claims by Rousseau (1995) on the specific aspects of the psychological contract; it is instead intended to make clear that the analysis of those aspects can prompt further study and raise interesting questions rather than answering questions (as mentioned in the previous paragraphs). "The psychological contract is perhaps a good example of a concept that ultimately raises more questions than it answers" (Conway and Briner 2005, Preface).

### HRM/VM and performance/outcomes

The other concept explored in this study is the link between HRM/VM and (organisational) performance/outcomes. The study supports the claim that VCs, as volunteer line managers, have an importance impact on VM implementing outcomes. That is to say, the extent of the difference between intended and actual VM outcomes depends on how VCs carry out their work. This statement can be generalised from the studied context (VM), to the HRM context, that HRM implementation by line managers largely influences organisational performance/outcomes. Line managers are thus regarded as important mediates to link HRM to organisational performance/outcomes as argued in relative literatures (Cunningham and Hyman 1995; Purcell et al. 2003; Gilbert, De Winne, and Sels 2011b; Purcell and Hutchinson 2007). This study further claims that the line managers, as the 'agents in the HRM-performance link' (Purcell and Hutchinson 2007), can lead to effective HRM implementation if they focus on caring for the employees' well-being (McCarthy, Darcy, and Grady 2010). The line managers' perception of their work plays an influential role in the outcome of HRM implementation, also seen as the actual HRM; their perception also shapes the employees' perceptions of the organisational and their work. Therefore, how line managers perceive the value of the human resource also influences their actual HRM work.

The link between HRM and organisational performance has remained as a myth/'black box' (Boselie et al. 2005) in the field, although there are an accumulation of studies showing the positive link between the two (e.g. Woodrow and Guest 2014). Among these, the role of line managers is highlighted as an

important ingredient to the (positive) outcomes of actual HRM implementation (Guest 1987; Khilji and Wang 2006; Purcell and Hutchinson 2007). This study supports these claims and further proposes that organisations unlikely benefit from mere establishment of HR policies and practices — however formal and comprehensive they might look — if managers fail to implement them from the stance of caring for their workforce (instrumental implementation/tick box exercises).

### *Understanding HRM/VM and performance/outcomes through exploring the psychological contract process*

From a SHRM perspective, studying the psychological contract process is particularly useful to answer 'why' questions: why do people behave differently at workplace? Why does the actual HRM differ from the intended HRM? Answers to these 'why' questions could help provide better evidence, while confirm the close link between HRM and organisational performance.

The outcomes of a continuous psychological contract (supported by the study) lead to employee engagement and retention; the engagement and retention then help organisations sustain their workforce's contribution to organisational performance in the long run. The Psychological Contract Theory can also be a useful concept to offer explicit evidence of a link between HRM and organisational performance. Extending from the above view, this study makes a further claim that maintaining a good employee relationship can be achieved by a competent line manager through facilitating an ongoing psychological contract process. Line managers can also influence the nature of employee's psychological contract (i.e. the characteristics of the employee relations). This claim furthers the debate of the impact of HR devolution to the line has on organisational performance. Understanding the psychological contract process offers a clearer explanation of why the line manager's performance has that impact, again demonstrating the Theory to be a useful concept for raising questions.

### 8.3.3 Adding empirical evidence to expand the body of knowledge on the VM

The study is perceived to be among a small number of empirical studies which explore the concept of VM in association with different individual influences. Therefore, the study adds empirical evidence to the body of knowledge into the specific concept of VM, derived from the main stream HRM. Being exploratory, this study is likely to widen the research arena to studying the concept in different contexts from different theoretical and practical perspectives. The study also demonstrates that SHRM plays an important role in different forms of organisations. HRM is once again confirmed to be the core of the management rather than merely a support function. The theoretical perspective not only helps to point out the human resource contribution to organisations, it also highlights the unavoidable influence individual players have on effectively planning and implementing HRM strategies. It is further argued that the VM concept, although largely dependent on HRM theories, should be differentiated from the conventional HRM debate due to the unique nature of the volunteer workforce and the characteristics of TSOs. It is thus seen as more appropriate for researchers to adapt HRM theories to form new theoretical perspectives of VM, to facilitate better understanding of the concept.

In this study, understanding the CEO's and the VC's perception of the value of volunteers and the need for VM can also be regarded as exploring the managers' psychological contract making and fulfilment such as the contract between CEO and the board of trustees and the contract between CEO and VC. The results reveal the interrelationship between their psychological contract and the VPC. All these psychological contracts are formed and fulfilled through the same stages under similar influences. Thus, an individual's predisposing factors play an important role in all kinds of psychological contract making and fulfilment. Its outcomes thus influence the level of CEO and VC commitment to their work; hence lead to different outcomes to the (strategic) VM planning and implementation.

### 8.3.4 Contributions to facilitating VM planning and implementation – Practical considerations

From a broader perspective, many TSOs in Scotland have overlapping missions and objectives, such as those which strive to protect the environment, or public service

delivery TSOs aiming to support different client groups. Almost all charity legislation in Scotland provides instructions and restrictions for setting up and running a TSO from the aspects of accounts management, fundraising organisation and documentation set up[23], but there is little government regulation in terms of specific requirements for managing volunteers. As an umbrella body, Volunteer Scotland Development (VDS) offers guidelines and support to VM across Scotland, yet TSOs are not obliged to have VM policies and practices in place. The emergence of such VM structure is driven by the development of the 'contract culture' (Billis and Harris 1996; Cunningham 2001). TSO managers are pushed to apply business-like management practices in order to have competitive advantage in contract bidding; on the other hand, TSO managers may lack people management skills and knowledge to perform as professional managers to support their workforce. The misalignment between the two aspects thus creates a situation which CEOs and VCs mistakenly believe that people management would be professionalised if they just set up a formal structure by adopting others' framework, or models recommended by umbrella TSOs, i.e. a 'ticking boxes' exercise[24]. As shown in the results, the 'tick box' exercise can focus primarily on instrumental VM implementation; concentrating merely on setting up formal VM policies and practices seems to take TSO managers' attention away from the core of the exercise – effectively supervising and supporting volunteering individuals.

The study findings could be developed to facilitate the management volunteer workforce across TSOs; this would be carried out by applying the findings to specific TSO needs and expectations. TSO managers should recognise the value of volunteers, as well as acknowledging the heterogeneity of volunteer demographics and expectations, as highlighted in previous studies (as reviewed in section 1.3.1). The findings might help TSO managers to focus on the needs for TSO development and on their work force, so they could plan and implement VM policies and practices effectively. It would further enable trustees and funders to understand the challenges which VCs face in effectively managing volunteers. However, awareness of volunteers' economic value still needs to be raised among wider audience such as funders.

Formally established VM policies and practices are essential to ensure effective VM. But this does not advocate setting up a comprehensive VM structure to cover absolutely all aspects, or adopting unquestioningly any 'good working models'. An effective VM structure should be tailored to best facilitate the specific operation of TSO and/or volunteer involved projects. Policies and practices should be designed to fit the needs of the TSO and volunteering roles. It is crucial for the CEO and the board of trustees to understand that the essence of setting up VM structure is to ensure that work is carried out successfully, and volunteer motives and expectations are fulfilled. Although the data did not particularly focus on the *degree* of formality of VM policies and practices within the three TSOs, the fact that they are being used suggests that some formal structure is necessary to ensure VC work is carried out productively. However, very formal structure is likely to facilitate the TSO more than it helps individual volunteers.

This study draws the attention of TSO managers to the fact that a VM structure does not equal an overall HRM structure, but a formally established VM structure is nonetheless essential to ensure effective VM outcomes. The findings acknowledged some similarities between HRM and VM, i.e. commonly established practices on recruitment and selection, training and development, and performance review. From a long term perspective, formally established VM policies and practices also facilitates the volunteer workforce expansion, and a TSO's needs for development. The study claims that HRM can only be placed onto a *strategic* position within an organisation if the CEO acknowledges the strategic advantage of the human asset, and if the CEO creates a HRM system that provides better care of the employees' well-being (Stanton et al. 2010).

It is also essential to have practical volunteer agreement terms in place, such as expense reimbursement and agreed work shifts and frequency (referred as transactional terms). Certain transactional terms should be included explicitly in volunteer agreements, to provide clear information so that individuals know what commitments they are expected to have, at the same time signalling that the TSO

does appreciate the volunteer contribution. As regards VPC making and fulfilment, establishing an expected period of service would help volunteers schedule their time, and would allow the organisation to be proactive in planning their volunteer workforce by reminding managers that volunteers do not stay forever.

This study further argues that all aspects of CEOs' and VCs' VM would benefit substantially from understanding the complete VPC process. The findings highlight important roles which VCs play in developing and sustaining a volunteer workforce. They also differentiate effective VM from instrumental VM, by showing that a simple 'tick the box' exercise often blurs TSO managers' visions of how to handle volunteers in a professional manner. The study findings could help TSO managers to assess and evaluate their own VM situation in order to make improvements accordingly. Furthermore, the findings do not only apply to the context of VM; they could also be adapted to people management across organisations in other sectors.

Finally, the study also demonstrates the potential good effects of managing VOR, including an increase in the level of individual commitment to the role and the TSO, help in expanding a TSO's volunteer population, and enhanced philanthropic involvement. All of these are likely to lead to more stable development of the third sector and society. Furthermore, effective VM can be argued to have positive impact on talent development for the general workforce, particularly in the aspect of developing ethical and socially responsible working populations.

### 8.3.5 Methodological considerations: contributions and limitations

As regards the study of the Psychological Contract Theory, the methodology applied to this study did not follow a common pattern, i.e. conducting a survey and quantitative data analysis. As discussed in Chapter Three, the researcher perceives the concept as a social phenomenon i.e. volunteer management, within an organisational context i.e. TSO. Thus, quantitative data from a survey would not facilitate the exploration of the concept. Instead, qualitative data which reflect participating individuals' view and their perceptions of the concept seem more suitable to explain the social phenomenon.

Understanding of the concept is achieved by collecting narratives through active interviews from the three role players, volunteers, CEOs and VCs, along with constructing the meaning to understand their involvement with volunteerism and VM. The qualitative data collected were interpreted, iterated and reiterated against the research questions. The methodology applied helped to uncover the intangible process of forming the VPC, and also the importance of forming views and understandings to the application of VM. Data from different individual perspectives triangulated the generation of meaning and allowed the researcher to cross-assess the validity of information, hence to draw conclusions to explain the concept. The approach helped to reveal the process of making and fulfilling psychological contracts and make sense of the outcome. This last could only be achieved by studying individual narratives to reveal the speaker's internal process. From this perspective, the Psychological Contract Theory is considered suitable to explore issues on the people relationship in a given organisation and to help line managers and HR professionals better understand the importance of their human resource.

Doubtless, this empirical study also has limitations. First, the quality of the study findings could be improved if there has been sufficient time to select the case study organisations with more consideration. For example, more TSOs could have been selected, wider types of TSOs as regards types of core activities could have been included (such as TSOs which protect the natural environment and animals), and TSOs in England and Wales could also have been selected to look at areas with different legislation. Second, because the researcher was not familiar with the sector prior to the research, more time would have helped her gain additional prior insights into how VM was conducted across TSOs in general. Third, it would have been valuable if data could have been obtained from client participants and trustees to strengthen the data triangulation. Their input would offer more evidence to better understand how they perceived actual VM effectiveness and the work performance of the VCs. Next, the data collected could add more detail to categorising widely adopted VM policies and practices if there had been a higher response rate to the online survey in the initial study stage. This part of data could then also have been used as part of data triangulation in the analysis. Finally, interviews with the CEOs

did not explicitly seek information on how they recruited and selected their VCs. This could have offered more direct evidence to better understand the CEOs' 'true' intention to VM.

## 8.4 Researcher reflections on the whole PhD experience
### 8.4.1 Reflections on learning outcomes

The process of conducting this study was challenging yet stimulating. The research topic was formed through a long journey of constant intellectual debate and expanding the knowledge capacity. From the research proposal on extending the understandings of HR devolution to the line (part of an MBA dissertation), then a research interest in looking at SHRM development within social enterprises, finally to the focus on the concept of VM; the whole process of seeking, understanding, re-seeking, re-adjusting research focus has actually enabled a deeper acquisition and application of knowledge. From learning and development to facilitating the whole research process, a number of academic competencies have been developed and enhanced at different stages, and they have improved the research and thesis quality. First, there was the transition from a business and management focus (MBA perspectives) to an academic focus at the start of the PhD. During that period, there was also improvement in academic writing style with the help and support from the supervisor. This is considered crucial to set the ground for solid research skill development.

In identifying the research topic, the extensive literature review widened the knowledge store, and the ability of critical analysis and review was enhanced dramatically. This let the researcher learn new subjects and prompted knowledge collaboration across subject areas within the social science domain — also valuable for starting an academic career. A further learning outcome is the deeper understanding of how to design and conduct empirical research, through hands on experience, including reviewing methodologies.

Above all, the research experience has offered first-hand opportunities to learn how a reflexive approach could enhance the research quality throughout and how it

benefited personal learning and enabled an immersion into the data as well as generating meaningful findings. The data management was carried out through iteration and reiteration of the data along with the researcher's constant reflections on the research topic and questions. This experience is considered crucial for conducting qualitative studies within social science fields. The activity helped to draw themes, categorise materials for the study and cross-check the meanings from multiple perspectives. An extended view is that the researcher has also found it much easier to grasp and critically comprehend new information by mastering the reflexive approach. Knowledge acquisition has become more efficient. This gives greater self-confidence in initiating and managing new research beyond the studied concept.

A further reflection is on the development of an ability to identify a synergy between different theoretical perspectives, even across a broader research domain, for example the synergy between HRM theories and Marketing theories. This is a daring attempt to propose personal observations on what differentiates the nature of theories[25]. It is the researcher's view that differentiation in theories does not lie in the actual subject differences e.g. marketing, finance, HRM and strategic management. Rather, it seems more to result from different philosophic stances (research paradigm) of the researchers i.e. Interpretivism, Positivism or Structuralism (Delanty and Strydom 2003). Under different paradigms scholars tend to focus on different aspects of a concept, even if the concept looked at is identical. Therefore, subject-led theories could perhaps be applied across subjects if the theoretical debates were developed under the same research philosophical stance, hence making cross-subject research collaboration easier and more effective. For example, different conclusions might be drawn from this study if the researcher had taken a Structuralism stance.

### 8.4.2 Reflections on personal development

The research process is challenging in every aspect, so the completion of this study has greatly enhanced the researcher's competence in independently carrying out a research project. Each task was carefully considered and rigorously executed to ensure trustworthy findings. This close management and control also enabled the researcher to assess and improve personal competencies in preparation for on-going

research. Another learning outcome relates to time management. The training process was controlled by the researcher with support from the supervisors; but the researcher was responsible for progressing the thesis, while at the same time honouring other commitments for career development, and fulfilling duties as a partner, a parent and a child. This learning experience further strengthened the researcher's ability to continue to develop within an academic career.

## 8.5 Suggestions for future studies and Implications – Final words

It is crucial to understand that a well-managed volunteer workforce is an essential asset to the development of TSOs, the third sector and beyond. This shows in activities at different organisational and sectorial/societal levels. It also links to even wider context within the sector, such as to policy making and institution adjustment; and across a wider range of organisations to potentially influence labour market restructuring and managing employee relationships.

Further study in this field could focus on either organisational or volunteer needs. Another angle would be to study other individual behaviour and relationships within TSOs using the framework i.e. relationships between trustees and CEOs, managers and paid employees, volunteers and paid peers and volunteers and their clients. All of these relationships, together with VOR, are considered interrelated and thus fabricate an organisational structure and culture. Hence, whether or not these relationships are well managed affects organisational development and sustainability. Therefore, more empirical evidence is necessary to make more and more TSO managers realise that human resource is the most important asset to TSOs and the sector development.

A further extended view is that this finding to some extent supports a topical debate within the UK and beyond — how voluntary work could facilitate the extension of working lives [for background reading on older workers and extending working life, see Loretto (2010); Loretto and White (2006); Loretto, Vickerstaff, and White (2005); and Loretto, Vickerstaff, and White (2007)]. Voluntary work has also been acknowledged as a career option for older people (Simpson, Richardson, and Zorn 2012). With the traditional working model being disrupted under various influences

over the years, the working population has been forced to seek alternatives (Freedman 2006; S. Kim and Feldman 2000; Loretto, Vickerstaff, and White 2005; Simpson, Richardson, and Zorn 2012; Sullivan et al. 2003). Policy makers and academic researchers across the western world have focussed on seeking ways to minimise the impact of an ageing working population on economies and society.

In conclusion, the impact of the voluntary workforce should draw more and more organisation researchers' attention, not only to help with the development of the third sector, but also to enhance general human resource competence, thus contributing to economic development nationally and globally. Consequently, the study findings also imply that strategically managing the workforce could sustain organisational development, provided that the strategies are centred on understanding and developing human resource to fulfil organisational development needs, instead of chasing instrumental development. If we look after the people appropriately, the people will then look after the organisation and business for us.

## Notes

1. Statistics on the number of TSOs are provided by Scottish Council of Voluntary Organisation (SCVO) and National Council of Voluntary Organisation (NCVO) annually.
2. https://www.gov.uk/government/organisations/cabinet-office/series/civil-society-update-series
3. http://www.scotland.gov.uk/Topics/People/15300
4. http://www.civilsociety.co.uk/directory/company/2765/office_for_civil_society
5. Although Scotland did not fully adopt 'Best Policy', its contents were applied to Scotland region
6. http://www.ncvo.org.uk/policy-and-research/vol-sector-workforce/what-research-tells-us
7. http://www.ncvo-vol.org.uk/sites/default/files/UploadedFiles/NCVO/Publications/Publications_Catalogue/Sector_Research/How_big_is_a_typical_voluntary_organisation.pdf
8. http://www.ncvo.org.uk/policy-and-research/volunteering-policy/what-research-tells-us
9. In average, contracts with local authorities usually last three years. This to some extent enabled voluntary organisations to recruit and train their workforce. It was also perceived to be a reason for vast increase in employment population in the sector.
10. http://www.scvo.org.uk/policy/sots-case-studies/public-funding-cuts-hit-voluntary-sector-workforce-hard-new-research/
11. The report is an interim finding report for a Scottish government funded longitudinal study between 2009 and 2013 – 'the Opportunities and Challenges of the Changing Public Services Landscape for the Third Sector in Scotland: A Longitudinal Study'. A final and full report could be accessed at http://www.nls.uk/scotgov/2014/9781784121792.pdf
12. There has been debate from academic and practitioners on how to help the third sector to survive the financial turmoil in a long run. Following from the notion, a workshop series – 'the Third sector in a time of risk and uncertainty' – was held in Edinburgh in May and June, 2012.
13. http://www.scvo.org.uk/wp-content/uploads/2010/08/SCVO_SectorStats_2010_Web.pdf
14. The discussion is taken from a research workshop on narrative approach by Prof. Arthur Frank. This was an example he gave in understanding the power of human understandings on social events.
15. http://www.scvo.org.uk/wp-content/uploads/2012/09/SCVO-Scottish-Third-Sector-Statistics-2012.pdf
16. http://aceit.org.uk/?page_id=91
17. The idea was highlighted by the CEO at Age IT when the researcher first met her for data collection arrangement.
18. http://aceit.org.uk/moose/?page_id=821
19. This is the opening remark by the CEO, stating the TSO's main objective and targeted client group http://www.ecas-edinburgh.org/
20. Adapted from http://www.ericliddell.org/about-us/about-us-home
21. http://www.ecas-edinburgh.org/getinvolved
22. The debate on 'professionalization' and 'formalisation' were raised in a study conducted by Matthew Hill and co at Institutes for Volunteering Research (IVR), and the working paper was presented at the Voluntary Sector and Volunteering Research Conference, Birmingham, September 2012.

23. http://www.scotland.gov.uk/Topics/People/15300/charities/CurrentLegislation/CurrentCharityLegislation
24. The expression was mentioned through interviewing one befriending volunteer from EC Support who is also an experience VC; this reflects her observation and view on current VM situation in the UK. In addition, the befriending manager also mentioned the inconsistency between setting up structures and implementing them.
25. This aspect is inspired by a viewpoint proposed by Professor Paolo Quattrone who is the Chair in Accounting Governance & Social Innovation at the Business School of University of Edinburgh. The view was raised during an in-house workshop – 'Theory and Theorising Workshop' on 10th October 2013.

# Reference

Akingbola, Kunle. 2006. 'Strategy and HRM in Nonprofit Organizations: Evidence from Canada'. *The International Journal of Human Resource Management* 17 (10): 1707–25. doi:10.1080/09585190600964350.

Alatrista, José, and James Arrowsmith. 2004. 'Managing Employee Commitment in the Not-for-Profit Sector'. *Personnel Review* 33 (5): 536–48. doi:10.1108/00483480410550143.

Allison, Lora D., Morris A. Okun, and Kathy S. Dutridge. 2002. 'Assessing Volunteer Motives: A Comparison of an Open-Ended Probe and Likert Rating Scales'. *Journal of Community & Applied Social Psychology* 12: 243–55. doi:10.1002/casp.677.

Anderson, L. 2003. 'Sound Bite Legislation: The Employment Act 2002 and New Flexible Working "Rights" for Parents'. *Industrial Law Journal* 32 (1): 37–42. doi:10.1093/ilj/32.1.37.

Armstrong, Michael, and Helen Murlis. 2007. *Reward Management: A Handbook of Remuneration Strategy and Practice*. Rev. 5th ed. London ; Philadelphia: Kogan Page.

Aselage, Justin, and Robert Eisenberger. 2003. 'Perceived Organizational Support and Psychological Contracts: A Theoretical Integration'. *Journal of Organizational Behavior* 24 (5): 491–509. doi:10.1002/job.211.

Baines, Donna. 2004. 'Caring for Nothing: Work Organization and Unwaged Labour in Social Services'. *Work, Employment & Society* 18 (2): 267–95. doi:10.1177/09500172004042770.

Barney, Jay. 1991. 'Firm Resources and Sustained Competitive Advantage.' *Journal of Management* 17 (1): 99–120. doi:10.1177/014920639101700108.

———. 2001. 'Resource-Based Theories of Competitive Advantage: A Ten-Year Retrospective on the Resource-Based View'. *Journal of Management* 27 (6): 643–50. doi:10.1177/014920630102700602.

Baruch, Yehuda. 2006. 'Communalities and Distinctions in the Measurement of Organizational Performance and Effectiveness Across For-Profit and Nonprofit Sectors'. *Nonprofit and Voluntary Sector Quarterly* 35 (1): 39–65. doi:10.1177/0899764005282468.

Becker, B. E., and M. A. Huselid. 2006. 'Strategic Human Resources Management: Where Do We Go From Here?'. *Journal of Management* 32 (6): 898–925. doi:10.1177/0149206306293668.

Benevene, Paula, and Michela Cortini. 2010. 'Interaction between Structural Capital and Human Capital in Italian NPOs: Leadership, Organizational Culture and Human Resource Management'. *Journal of Intellectual Capital* 11 (2): 123–39. doi:10.1108/14691931011039642.

Billis, David, and Margaret Harris. 1992. 'Taking the Strain of Change: U.K. Local Voluntary Agencies Enter the Post-Thatcher Period'. *Nonprofit and Voluntary Sector Quarterly* 21 (3): 211–25. doi:10.1177/089976409202100303.

———. 1996. *Voluntary Agencies: Challenges of Organisation and Management*. Macmillan.

Blackman, Deborah A., and Angela M. Benson. 2010. 'The Role of the Psychological Contract in Managing Research Volunteer Tourism'. *Journal of Travel & Tourism Marketing* 27 (3): 221–35. doi:10.1080/10548401003744669.

Blaikie, Norman. 2010. *Designing Social Research : The Logic of Anticipation*. Cambridge: Polity.

Boselie, Paul, Graham Dietz, and Corine Boon. 2005. 'Commonalities and Contradictions in HRM and Performance Research'. *Human Resource Management Journal* 15 (3): 67–94. doi:10.1111/j.1748-8583.2005.tb00154.x.

Bowman, Woods. 2009. 'The Economic Value of Volunteers to Nonprofit Organizations'. *Nonprofit Management and Leadership* 19 (4): 491–506. doi:10.1002/nml.233.

Boxall, Peter. 1992. 'Strategic Human Resource Management: Beginnings of a New Theoretical Sophistication?'. *Human Resource Management Journal* 2 (3): 60–79. doi:10.1111/j.1748-8583.1992.tb00260.x.

———. 1996. 'The Strategic HRM Debate and the Resource-Based View of the Firm'. *Human Resource Management Journal* 6 (3): 59–75. doi:10.1111/j.1748-8583.1996.tb00412.x.

———. 1998. 'Achieving Competitive Advantage through Human Resource Strategy: Towards a Theory of Industry Dynamics'. *Human Resource Management Review* 8 (3): 265–88. doi:10.1016/S1053-4822(98)90005-5.

———. 2003. 'HR Strategy and Competitive Advantage in the Service Sector'. *Human Resource Management Journal* 13 (3): 5–20. doi:10.1111/j.1748-8583.2003.tb00095.x.

Boyne, George A. 1998. 'Competitive Tendering In Local Government: A Review Of Theory And Evidence'. *Public Administration* 76 (4): 695–712. doi:10.1111/1467-9299.00132.

Briggs, Senga, and William Keogh. 1999. 'Integrating Human Resource Strategy and Strategic Planning to Achieve Business Excellence'. *Total Quality Management* 10 (4): 447–53.

Brown, William. 2004. 'Exploring Strategy and Board Structure in Nonprofit Organizations'. *Nonprofit and Voluntary Sector Quarterly* 33 (3): 377–400. doi:10.1177/0899764004265428.

Brown, William, Simon Deakin, David Nash, and Sarah Oxenbridge. 2000. 'The Employment Contract: From Collective Procedures to Individual Rights'. *British Journal of Industrial Relations* 38 (4): 611–29. doi:10.1111/1467-8543.00182.

Bryman, Alan, and Emma Bell. 2003. *Business Research Methods*. Oxford; New York: Oxford University Press.

Buchanan, David A, and Alan Bryman. 2009. *The SAGE Handbook of Organizational Research Methods*. Los Angeles: SAGE.

Bussell, Helen, and Deborah Forbes. 2003. 'The Volunteer Life Cycle: A Marketing Model for Volunteering'. http://tees.openrepository.com/tees/handle/10149/96938.

Callero, Peter L., Judith A. Howard, and Jane A. Piliavin. 1987. 'Helping Behavior as Role Behavior: Disclosing Social Structure and History in the Analysis of Prosocial Action'. *Social Psychology Quarterly* 50 (3): 247–56. doi:10.2307/2786825.

Campbell, Donald T., and Donand W. Fiske. 1959. 'Convergent and Discriminant Validation by the Multitrait-Multimethod Matrix'. *Psychological Bulletin* 56 (2): 81–105.

Campello, Murillo, John R. Graham, and Campbell R. Harvey. 2010. 'The Real Effects of Financial Constraints: Evidence from a Financial Crisis'. *Journal of Financial Economics* 97 (3): 470–87. doi:10.1016/j.jfineco.2010.02.009.

Carey, Gemma, Annette Braunack-Mayer, and Jo Barraket. 2009. 'Spaces of Care in the Third Sector: Understanding the Effects of Professionalization'. *Health: An Interdisciplinary Journal for the Social Study of Health, Illness and Medicine* 13 (6): 629–46. doi:10.1177/1363459308341866.

Chadwick-Jones, J. K. 1976. *Social Exchange Theory: Its Structure and Influence in Social Psychology*. London; New York: Published in cooperation with European Association of Experimental Social Psychology by Academic Press.

Chang, Wan-Jing April, and Tung Chun Huang. 2005. 'Relationship between Strategic Human Resource Management and Firm Performance: A Contingency Perspective'. *International Journal of Manpower* 26 (5): 434–49. doi:10.1108/01437720510615125.

CIPD. 2013. *Employee Outlook: Spring 2013 - Survey Reports*. CIPD. http://www.cipd.co.uk/hr-resources/survey-reports/employee-outlook-spring-2013.aspx.

Clary, E. Gil, Robert D. Ridge, Arthur A. Stukas, Mark Snyder, John Copeland, Julie Haugen, and Peter Miene. 1998. 'Understanding and Assessing the Motivations of Volunteers: A Functional Approach'. *Journal of Personality and Social Psychology* 74 (6): 1516–30. doi:10.1037/0022-3514.74.6.1516.

Clary, E. Gil, and Mark Snyder. 1999. 'The Motivations to Volunteer: Theoretical and Practical Considerations'. *Current Directions in Psychological Science* 8 (5): 156–59. doi:10.1111/1467-8721.00037.

Connelly, Brian L., S. Trevis Certo, R. Duane Ireland, and Christopher R. Reutzel. 2011. 'Signaling Theory: A Review and Assessment'. *Journal of Management* 37 (1): 39–67. doi:10.1177/0149206310388419.

Conway, Neil, and Rob B Briner. 2005. *Understanding Psychological Contracts at Work a Critical Evaluation of Theory and Research*. Oxford; New York: Oxford University Press. http://site.ebrary.com/id/10177924.

Coyne, B.S., and Edward J. Coyne, Sr. 2001. 'Getting, Keeping and Caring for Unpaid Volunteers for Professional Golf Tournament Events: A Study of the Recruitment/retention of Unpaid Volunteers for Staging Large, Mass-Attended, High-Profile Professional Golf Association (PGA) Golf Tournaments'. *Human Resource Development International* 4 (2): 199–214. doi:10.1080/13678860121999.

Crotty, Michael. 1998. *The Foundations of Social Research: Meaning and Perspective in the Research Process*. London [u.a.: SAGE.

Cunningham, Ian. 1999. 'Human Resource Management in the Voluntary Sector: Challenges and Opportunities'. *Public Money & Management* 19 (2): 19–25. doi:10.1111/1467-9302.00161.

———. 2001. 'Sweet Charity! Managing Employee Commitment in the UK Voluntary Sector'. *Employee Relations* 23 (3): 226–40. doi:10.1108/01425450110392616.

———. 2008a. 'Reshaping Employment Relations in the UK Voluntary Sector: An Exploratory Study into the Impact of Best Value'. *Local Government Studies* 34 (3): 379–96. doi:10.1080/03003930802044577.

———. 2008b. 'A Race to the Bottom? Exploring Variations in Employment Conditions in the Voluntary Sector'. *Public Administration* 86 (4): 1033–53. doi:10.1111/j.1467-9299.2008.00752.x.

———. 2010. 'Drawing from a Bottomless Well? Exploring the Resilience of Value-Based Psychological Contracts in Voluntary Organizations'. *The International Journal of Human Resource Management* 21 (5): 699–719. doi:10.1080/09585191003658862.

Cunningham, Ian, and Jeff Hyman. 1995. 'Transforming the HRM Vision into Reality: The Role of Line Managers and Supervisors in Implementing Change'. *Employee Relations* 17 (8): 5–20. doi:10.1108/01425459510103451.

———. 1999. 'Devolving Human Resource Responsibilities to the Line: Beginning of the End or a New Beginning for Personnel?'. *Personnel Review* 28 (1/2): 9–27. doi:10.1108/00483489910248947.

Cuskelly, Graham, and Alistair Boag. 2001. 'Organisational Commitment as a Predictor of Committee Member Turnover among Volunteer Sport Administrators: Results of a

Time-Lagged Study'. *Sport Management Review* 4: 65–86. doi:10.1016/S1441-3523(01)70070-8.

Cuskelly, Graham, Tracy Taylor, Russell Hoye, and Simon Darcy. 2006. 'Volunteer Management Practices and Volunteer Retention: A Human Resource Management Approach'. *Sport Management Review* 9 (2): 141–63. doi:10.1016/S1441-3523(06)70023-7.

Czarniawska-Joerges, Barbara. 2004. *Narratives in Social Science Research*. London; Thousand Oaks, Calif.: Sage Publications.

Davenport, Jeremy, and Paul D. Gardiner. 2007. 'Performance Management in the Not-for-Profit Sector with Reference to the National Trust for Scotland'. *Total Quality Management & Business Excellence* 18 (3): 303–11. doi:10.1080/14783360601152517.

Delaney, John T., and Mark A. Huselid. 1996. 'The Impact of Human Resource Management Practices on Perceptions of Organizational Performance'. *Academy of Management Journal* 39 (4): 949–69. doi:10.2307/256718.

Delanty, Gerard, and Piet Strydom, eds. 2003. *Philosophies of Social Science: The Classic and Contemporary Readings*. Maidenhead, England ; Phildelphia: Open University.

Denzin, Norman K. 1970. *Sociological Methods: A Sourcebook*. London: Butterworths.

Denzin, Norman K. 1978. *The Research Act: A Theoretical Introduction to Sociological Methods*. 2d ed. New York: McGraw-Hill.

Dickens, Linda, and Mark Hall. 2006. 'Fairness ? Up to a Point. Assessing the Impact of New Labour's Employment Legislation'. *Human Resource Management Journal* 16 (4): 338–56. doi:10.1111/j.1748-8583.2006.00024.x.

Donaldson, Lex. 2001. *The Contingency Theory of Organizations*. Thousand Oaks, Calif.: Sage Publications.

Dutton, Matthew, Valerie Egdell, Ronald McQuaid, and Stephen P Osborne. 2013. *The Opportunities and Challenges of the Changing Public Services Landscape for the Third Sector in Scotland: A Longitudinal Study (2009 - 2013) : Year 4 and Final Report*. http://www.nls.uk/scotgov/2014/9781784121792.pdf.

Emerson, Richard M. 1976. 'Social Exchange Theory'. *Annual Review of Sociology* 2 (January): 335–62. doi:10.2307/2946096.

Etzioni, Amitai. 1975. *A Comparative Analysis of Complex Organizations: On Power, Involvement, and Their Correlates*. New York: Macmillan Free Pr.

Farmer, Steven M., and Donald B. Fedor. 1999. 'Volunteer Participation and Withdrawal'. *Nonprofit Management and Leadership* 9 (4): 349–68. doi:10.1002/nml.9402.

Fincham, Robin, Peter S Rhodes, and Robin Fincham. 1999. *Principles of Organizational Behaviour*. Oxford; New York: Oxford University Press.

Finkelstein, Marcia A. 2006. 'Dispositional Predictors of Organizational Citizenship Behavior: Motives, Motive Fulfillment, and Role Identity'. *Social Behavior and Personality: An International Journal* 34 (6): 603–16. doi:10.2224/sbp.2006.34.6.603.

———. 2008a. 'Predictors of Volunteer Time: The Changing Contributions of Motive Fulfillment and Role Identity'. *Social Behavior and Personality: An International Journal* 36 (10): 1353–63. doi:10.2224/sbp.2008.36.10.1353.

———. 2008b. 'Volunteer Satisfaction and Volunteer Action: A Functional Approach'. *Social Behavior and Personality: An International Journal* 36 (1): 9–18. doi:10.2224/sbp.2008.36.1.9.

Finkelstein, Marcia A., and Michael T. Brannick. 2007. 'Applying Theories of Institutional Helping to Informal Volunteering: Motives, Role Identity, and Prosocial Personality'. *Social Behavior and Personality: An International Journal* 35 (1): 101–14. doi:10.2224/sbp.2007.35.1.101.

Finkelstein, Marcia A., and Louis A. Penner. 2004. 'Predicting Organizational Citizenship Behavior: Intergrating the Functional and Role Identity Approaches'. *Social Behavior and Personality: An International Journal* 32 (4): 383–98. doi:10.2224/sbp.2004.32.4.383.

Finkelstein, Marcia A., Louis A. Penner, and Michael T. Brannick. 2005. 'Motive, Role Identity, and Prosocial Personality as Predictors of Volunteer Activity'. *Social Behavior and Personality: An International Journal* 33 (4): 403–18. doi:10.2224/sbp.2005.33.4.403.

Fontana, Andrea. 2002. 'Postmodern Trends in Interviewing'. In *Handbook of Interview Research: Context & Method*, edited by Jaber F Gubrium and James A Holstein, 161–75. SAGE Publications.

Frank, Arthur W. 2010. *Letting Stories Breathe: A Socio-Narratology*. Chicago; London: University of Chicago Press.

Frank, Fredric D, Richard P Finnegan, and Craig R Taylor. 2004. 'The Race for Talent: Retaining and Engaging Workers in the 21st Century'. *Human Resource Planning* 27 (3): 12–25.

Freedman, Marc. 2006. 'The Social-Purpose Encore Career: Baby Boomers, Civic Engagement, and the next Stage of Work'. *Generations* 30 (4): 43–46.

Furnham, Adrian. 2005. *The Psychology of Behaviour at Work the Individual in the Organization*. Hove [England]; New York: Psychology Press. http://search.ebscohost.com/login.aspx?direct=true&scope=site&db=nlebk&db=nlabk&AN=476688.

Fyfe, Nicholas R., and Christine Milligan. 2003. 'Out of the Shadows: Exploring Contemporary Geographies of Voluntarism'. *Progress in Human Geography* 27 (4): 397–413. doi:10.1191/0309132503ph435oa.

Gaskin, Katharine. 2003. *A Choice Blend: What Volunteers Want from Organisation and Management*. Institute for Volunteering Research.

George, Jennifer M., and Arthur P. Brief. 1992. 'Feeling Good & Doing Good: A Conceptual Analysis of the Mood at Work & Organizational Spontaneity Relationship.' *Psychological Bulletin* 112 (2): 310–29. doi:10.1037/0033-2909.112.2.310.

Gergen, Kenneth J, and Mary M Gergen. 1988. 'Narrative and the Self as Relationship'. *Advances in Experimental Social Psychology* 21 (1): 17–56.

Gibb, Stephen. 2003. 'Line Manager Involvement in Learning and Development: Small Beer or Big Deal?'. *Employee Relations* 25 (3): 281–93. doi:10.1108/01425450310475865.

Gilbert, Caroline, Sophie De Winne, and Luc Sels. 2011a. 'Antecedents of Front-Line Mangers' Perceptions of HR Role Stressors'. *Personnel Review* 40 (5): 549–69. doi:10.1108/00483481111154432.

———. 2011b. 'The Influence of Line Managers and HR Department on Employees' Affective Commitment'. *The International Journal of Human Resource Management* 22 (8): 1618–37. doi:10.1080/09585192.2011.565646.

Glaser, Barney G, and Anselm L Strauss. 1967. *The Discovery of Grounded Theory: Strategies for Qualitative Research*. Chicago: Aldine Pub. Co.

Gooderham, Paul N., Odd Nordhaug, and Kristen Ringdal. 1999. 'Institutional and Rational Determinants of Organizational Practices: Human Resource Management in European Firms'. *Administrative Science Quarterly* 44 (3): 507. doi:10.2307/2666960.

Gould, Sam. 1979. 'An Equity-Exchange Model of Organizational Involvement'. *Academy of Management Review*, 53–62. doi:10.5465/AMR.1979.4289183.

Green, Kenneth W., Cindy Wu, Dwayne Whitten, and Bobby Medlin. 2006. 'The Impact of Strategic Human Resource Management on Firm Performance and HR Professionals'

Work Attitude and Work Performance'. *The International Journal of Human Resource Management* 17 (4): 559–79. doi:10.1080/09585190600581279.

Gregory, Christina K., Adam W. Meade, and Lori Foster Thompson. 2013. 'Understanding Internet Recruitment via Signaling Theory and the Elaboration Likelihood Model'. *Computers in Human Behavior* 29 (5): 1949–59. doi:10.1016/j.chb.2013.04.013.

Grube, Jean A., and Jane Allyn Piliavin. 2000. 'Role Identity, Organizational Experiences, and Volunteer Performance'. *Personality and Social Psychology Bulletin* 26 (9): 1108–19. doi:10.1177/01461672002611007.

Gubrium, Jaber F, and James A Holstein. 2002. 'From the Individual Interview to the Interview Society'. In *Handbook of Interview Research: Context & Method*, edited by Jaber F. Gubrium and James A. Holstein. Thousand Oaks, Calif: Sage Publications.

Guest, David. 1987. 'Human Resource Management and Industrial Relations'. *Journal of Management Studies* 24 (5): 503–21. doi:10.1111/j.1467-6486.1987.tb00460.x.

———. 1997. 'Human Resource Management and Performance: A Review and Research Agenda'. *The International Journal of Human Resource Management* 8 (3): 263–76. doi:10.1080/095851997341630.

———. 1999. 'Is the Psychological Contract Worth Taking Seriously?'. *Journal of Organizational Behavior* 19 (1): 649–64. doi:10.1002/(SICI)1099-1379(1998)19:1+<649::AID-JOB970>3.0.CO;2-T.

Guest, David, Jonathan Michie, Neil Conway, and Maura Sheehan. 2003. 'Human Resource Management and Corporate Performance in the UK'. *British Journal of Industrial Relations* 41 (2): 291–314. doi:10.1111/1467-8543.00273.

Hager, Mark A., and Jeffrey L. Brudney. 2004. *Volunteer Management Practices and Retention of Volunteers*. The Urban Institute. http://www.urban.org/Template.cfm?NavMenuID=24&template=/TaggedContent/ViewPublication.cfm&PublicationID=8878.

Hay, Gillian Kellock, Rona S. Beattie, Ron Livingstone, and Pauline Munro. 2001. 'Change, HRM and the Voluntary Sector'. *Employee Relations* 23 (3): 240–56. doi:10.1108/01425450110392698.

Hendry, Chris, and Andrew Pettigrew. 1990. 'Human Resource Management: An Agenda for the 1990s'. *The International Journal of Human Resource Management* 1 (1): 17–43. doi:10.1080/09585199000000038.

Herman, Robert D., and David O. Renz. 1998. 'Nonprofit Organizational Effectiveness: Contrasts Between Especially Effective and Less Effective Organizations'. *Nonprofit Management and Leadership* 9 (1): 23–38. doi:10.1002/nml.9102.

Holstein, James A, and Jaber F Gubrium. 1997. 'Active Interviewing'. In *Qualitative Research: Theory, Method, and Practice*, edited by David Silverman. London ; Thousand Oaks, Calif: Sage Publications.

Huczynski, Andrzej A, and David A Buchanan. 2007. *Organizational Behaviour : An Introductory Text.* Harlow: Financial Times Prentice Hall.

Hudson, Mike. 1995. *Managing without Profit : The Art of Managing Third-Sector Organizations*. London: Penguin Books.

Huselid, M. A., S. E. Jackson, and R. S. Schuler. 1997. 'Technical and Strategic Human Resources Management Effectiveness as Determinants of Firm Performance'. *Academy of Management Journal* 40 (1): 171–88. doi:10.2307/257025.

Hustinx, Lesley, and Femida Handy. 2009. 'Where Do I Belong? Volunteer Attachment in a Complex Organization'. *Administration in Social Work* 33 (2): 202–20. doi:10.1080/03643100902769129.

Jackson, John, Ian Cunningham, and Alistair Dutton. 2001. 'The Impact of the Employment Relations Act 1999 on Scotland's Voluntary Sector'. *Employee Relations* 23 (3): 256–70. doi:10.1108/01425450110392670#sthash.nlbBad04.dpuf.

Jaeger, Urs, Karin Kreutzer, and Timon Beyes. 2009. 'Balancing Acts: NPO-Leadership and Volunteering'. *Financial Accountability & Management* 25 (1): 79–97. doi:10.1111/j.1468-0408.2008.00466.x.

Jenkins, Katy. 2005. 'No Way Out? Incorporating and Restructuring the Voluntary Sector within Spaces of Neoliberalism'. *Antipode* 37 (3): 613–18. doi:10.1111/j.0066-4812.2005.00514.x.

Jiang, Kaifeng, David P. Lepak, Jia Hu, and Judith C. Baer. 2012. 'How Does Human Resource Management Influence Organizational Outcomes? A Meta-Analytic Investigation of Mediating Mechanisms'. *Academy of Management Journal* 55 (6): 1264–94. doi:10.5465/amj.2011.0088.

Katou, Anastasia A., and Pawan S. Budhwar. 2012. 'The Link Between HR Practices, Psychological Contract Fulfillment, and Organizational Performance: The Case of the Greek Service Sector'. *Thunderbird International Business Review* 54 (6): 793–809. doi:10.1002/tie.21504.

Kendall, Jeremy. 2003. *The Voluntary Sector: Comparative Perspectives in the UK*. London; New York: Routledge.

Kerby, Anthony Paul. 1991. *Narrative and the Self*. Studies in Continental Thought. Bloomington: Indiana University Press.

Khilji, Shaista E., and Xiaoyun Wang. 2006. '"Intended" and "implemented" HRM: The Missing Linchpin in Strategic Human Resource Management Research'. *The International Journal of Human Resource Management* 17 (7): 1171–89. doi:10.1080/09585190600756384.

Kim, May, James J. Zhang, and Dan P. Connaughton. 2010. 'Comparison of Volunteer Motivations in Different Youth Sport Organizations'. *European Sport Management Quarterly* 10 (3): 343–65. doi:10.1080/16184741003770198.

Kim, Seongsu, and Daniel C. Feldman. 2000. 'Working in Retirement: The Antecedents of Bridge Employment and Its Consequences for Quality of Life in Retirement'. *Academy of Management Journal* 43 (6): 1195–1210. doi:10.2307/1556345.

Koch, Marianne J., and Rita Gunther McGrath. 1996. 'Improving Labor Productivity: Human Resource Management Policies Do Matter'. *Strategic Management Journal* 17: 335–54. doi:10.1002/(SICI)1097-0266(199605)17:5<335::AID-SMJ814>3.0.CO;2-R.

Kong, Eric. 2007. 'The Strategic Importance of Intellectual Capital in the Non-Profit Sector'. *Journal of Intellectual Capital* 8 (4): 721–31. doi:10.1108/14691930710830864.

———. 2008. 'The Development of Strategic Management in the Non-Profit Context: Intellectual Capital in Social Service Non-Profit Organizations'. *International Journal of Management Reviews* 10 (3): 281–99. doi:10.1111/j.1468-2370.2007.00224.x.

Kotz, David M. 2009. 'The Financial and Economic Crisis of 2008: A Systemic Crisis of Neoliberal Capitalism'. *Review of Radical Political Economics* 41 (3): 305–17. doi:10.1177/0486613409335093.

Kreutzer, Karin, and Urs Jäger. 2011. 'Volunteering Versus Managerialism: Conflict Over Organizational Identity in Voluntary Associations'. *Nonprofit and Voluntary Sector Quarterly* 40 (4): 634–61. doi:10.1177/0899764010369386.

Kroeze, Jan H. 2012. 'Postmodernism, Interpretivism, and Formal Ontologies'. In *Research Methodologies, Innovations and Philosophies in Software Systems Engineering and Information Systems:*, edited by Manuel Mora, Ovsei Gelman, Annette L. Steenkamp, and Mahesh Raisinghani. IGI Global. http://services.igi-global.com/resolvedoi/resolve.aspx?doi=10.4018/978-1-4666-0179-6.

Larsen, Henrik Holt, and Chris Brewster. 2003. 'Line Management Responsibility for HRM: What Is Happening in Europe?'. *Employee Relations* 25 (3): 228–44. doi:10.1108/01425450310475838.

Legge, Karen. 2005. *Human Resource Management : Rhetorics and Realities*. Houndmills, Basingstoke, Hampshire; New York, N.Y.: Palgrave Macmillan.

Lengnick-Hall, Mark L., Cynthia A. Lengnick-Hall, Leticia S. Andrade, and Brian Drake. 2009. 'Strategic Human Resource Management: The Evolution of the Field'. *Human Resource Management Review* 19 (2): 64–85. doi:10.1016/j.hrmr.2009.01.002.

Leonard, Rosemary, Jenny Onyx, and Helen Hayward-Brown. 2004. 'Volunteer and Coordinator Perspectives on Managing Women Volunteers'. *Nonprofit Management and Leadership* 15 (2): 205–19. doi:10.1002/nml.62.

Levinson, Harry. 1965. 'Reciprocation: The Relationship between Man and Organization'. *Administrative Science Quarterly*, 370–90. doi:10.2307/2391032.

Liao-Troth, Matthew A. 2003. 'Attitude Differences between Paid Workers and Volunteers'. *Nonprofit Management and Leadership* 11 (4): 423–42. doi:10.1002/nml.11403.

Liao-Troth, Matthew A., and Craig P. Dunn. 1999. 'Social Constructs and Human Service: Managerial Sensemaking of Volunteer Motivation'. *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 10 (4): 345–61. doi:10.1023/A:1021486408619.

Liebschutz, Sarh F. 1992. 'Coping by Nonprofit Organizations during the Reagan Years'. *Nonprofit Management and Leadership* 2 (4): 363–80. doi:10.1002/nml.4130020405.

Lindsay, William M., and Leslie W. Rue. 1980. 'Impact of the Organization Environment on the Long-Range Planning Process: A Contingency View'. *Academy of Management Journal* 23 (3): 385–404. doi:10.2307/255507.

Lishman, Joyce, and Fiona Wardell. 1998. *The Role of Volunteer Co-Ordinators*. [Edinburgh]: Scottish Executive Central Research Unit.

Loretto, Wendy. 2010. 'Work and Retirement in an Ageing World: The Case of Older Workers in the UK'. *Twenty-First Century Society* 5 (3): 279–94. doi:10.1080/17450144.2010.480831.

Loretto, Wendy, Sarah Vickerstaff, and Phil White. 2005. *Older Workers and Options for Flexible Work*. Manchester: Equal Opportunities Commission. http://www.equalityhumanrights.com/uploaded%5Ffiles/the%5Fimpact%5Fof%5Fa %5Fhuman%5Frights%5Fculture%5Fon%5Fpublic%5Fsector%5Forganisations.pdf.

———. , eds. 2007. *The Future for Older Workers: New Perspectives*. Bristol, UK: Policy Press.

Loretto, Wendy, and Phil White. 2006. 'Work, More Work and Retirement: Older Workers' Perspectives'. *Social Policy and Society* 5 (04): 495. doi:10.1017/S1474746406003204.

Macey, William H., and Benjamin Schneider. 2008. 'The Meaning of Employee Engagement'. *Industrial and Organizational Psychology* 1 (1): 3–30. doi:10.1111/j.1754-9434.2007.0002.x.

March, James G, and Herbert A Simon. 1958. *Organizations*. New York: Wiley.

Mauthner, Natasha S., and Andrea Doucet. 2003. 'Reflexive Accounts and Accounts of Reflexivity in Qualitative Data Analysis'. *Sociology* 37 (3): 413–31. doi:10.1177/00380385030373002.

Maxwell, G.A., and S. Watson. 2006. 'Perspectives on Line Managers in Human Resource Management: Hilton International's UK Hotels'. *The International Journal of Human Resource Management* 17 (6): 1152–70. doi:10.1080/09585190600697638.

McCarthy, Alma, Colette Darcy, and Geraldine Grady. 2010. 'Work-Life Balance Policy and Practice: Understanding Line Manager Attitudes and Behaviors'. *Human Resource Management Review* 20 (2): 158–67. doi:10.1016/j.hrmr.2009.12.001.

McCurley, Steve, and Rick Lynch. 1994. *Essential Volunteer Management*. London: Directory of Social Change.

McGovern, Patrick, Lynda Gratton, Veronica Hope-Hailey, Philip Stiles, and Catherine Truss. 1997. 'Human Resource Management on the Line?'. *Human Resource Management Journal* 7 (4): 12–29. doi:10.1111/j.1748-8583.1997.tb00286.x.

McSweeney, Phil, and Don Alexander. 1996. *Managing Volunteers Effectively*. Aldershot; Broofield, Vt.: Arena.

Miles, Matthew B, and A. M Huberman. 1994. *Qualitative Data Analysis : An Expanded Sourcebook*. Thousand Oaks: Sage Publications.

Miles, Raymond E, and Charles C Snow. 1978. *Organizational Strategy, Structure, and Process*. New York: McGraw-Hill.

Miller, Jody, and Barry Glassner. 1997. 'The "Inside" and the "Outside" Finding Realities in Interviews'. In *Qualitative Research: Theory, Method, and Practice*, edited by David Silverman. London ; Thousand Oaks, Calif: Sage Publications.

Milner, Andrew. 1994. *Contemporary Cultural Theory*. London: UCL Press.

Mirvis, Philip H., and Douglas T. Hall. 1994. 'Psychological Success and the Boundaryless Career'. *Journal of Organizational Behavior*, no. 4: 365. doi:10.1002/job.4030150406.

Mishler, Elliot George. 1986. *Research Interviewing: Context and Narrative*. Cambridge, Mass.: Harvard University Press.

Nickson, Dennis, Chris Warhurst, Eli Dutton, and Scott Hurrell. 2008. 'A Job to Believe in: Recruitment in the Scottish Voluntary Sector.' *Human Resource Management Journal* 18 (1): 20–35. doi:10.1111/j.1748-8583.2007.00056.x.

Okun, Morris A. 1994. 'The Relation Between Motives for Organizational Volunteering and Frequency of Volunteering by Elders'. *Journal of Applied Gerontology* 13 (2): 115–26. doi:10.1177/073346489401300201.

Omoto, Allen M., and Mark Snyder. 1995. 'Sustained Helping without Obligation: Motivation, Longevity of Service, and Perceived Attitude Change among AIDS Volunteers.' *Journal of Personality and Social Psychology* 68 (4): 671–86. doi:10.1037/0022-3514.68.4.671.

———. 2002. 'Considerations of Community: The Context and Process of Volunteerism'. *American Behavioral Scientist* 45 (5): 846–67. doi:10.1177/0002764202045005007.

Osborne, Stephen P. 1998. *Voluntary Organizations and Innovation in Public Services*. Routledge Studies in the Management of Voluntary and Non-Profit Organizations 1. London ; New York: Routledge.

Osborne, Stephen P, Ron McQuaid, Matthew Dutton, Sue Bond, Valerie Egdell, and Elric Honore. 2012. 'The Opportunities and Challenges of the Changing Public Services Landscape for the Third Sector in Scotland a Longitudinal Study: Year Three Report (2009-2012)'. Scottish Government, Social Research. http://www.nls.uk/scotgov/2012/9781782561521.pdf.

Parry, Emma, Clare Kelliher, Tim Mills, and Shaun Tyson. 2005. 'Comparing HRM in the Voluntary and Public Sectors'. *Personnel Review* 34 (5): 588–602. doi:10.1108/00483480510612530.

Pearce, Jone L. 1993. *Volunteers : The Organizational Behavior of Unpaid Workers*. London; New York: Routledge.

Piliavin, Jane Allyn, Jean A. Grube, and Peter L. Callero. 2002. 'Role as Resource for Action in Public Service'. *Journal of Social Issues* 58 (3): 469–85. doi:10.1111/0022-4537.t01-1-00027.

Pollert, Anna. 2005. 'The Unorganised Worker: The Decline in Collectivism and New Hurdles to Individual Employment Rights'. *Industrial Law Journal* 34 (3): 217–38. doi:10.1093/indlaw/dwi016.

Powell, Thomas C. 2001. 'Competitive Advantage: Logical and Philosophical Considerations'. *Strategic Management Journal* 22 (9): 875–88. doi:10.1002/smj.173.

Prochaska, F. K. 1988. *The Voluntary Impulse: Philanthropy in Modern Britain*. London: Faber.

Purcell, John, and Sue Hutchinson. 2007. 'Front-Line Managers as Agents in the HRM-Performance Causal Chain: Theory, Analysis and Evidence'. *Human Resource Management Journal* 17 (1): 3–20. doi:10.1111/j.1748-8583.2007.00022.x.

Purcell, John, Sue Hutchinson, Bruce Rayton, and Juani Swart. 2003. *Understanding the People and Performance Link: Unlocking the Black Box*. London: Chartered Institute of Personnel and Development.

Reich, Warren A. 2000. 'Identity Structure, Narrative Accounts, and Commitment to a Volunteer Role'. *The Journal of Psychology* 134 (4): 422–34. doi:10.1080/00223980009598226.

Ridder, H.-G., and A. McCandless. 2010. 'Influences on the Architecture of Human Resource Management in Nonprofit Organizations: An Analytical Framework'. *Nonprofit and Voluntary Sector Quarterly* 39 (1): 124–41. doi:10.1177/0899764008328182.

Riessman, Catherine Kohler. 1993. *Narrative Analysis*. Newbury Park, CA: Sage Publications.

Rioux, Sheila M., and Louis A. Penner. 2001. 'The Causes of Organizational Citizenship Behavior: A Motivational Analysis.' *Journal of Applied Psychology* 86 (6): 1306–14. doi:10.1037/0021-9010.86.6.1306.

Robson, Colin. 2002. *Real World Research : A Resource for Social Scientists and Practitioner-Researchers*. Oxford, UK; Madden, Mass.: Blackwell Publishers.

Rousseau, Denise M. 1989. 'Psychological and Implied Contracts in Organizations'. *Employee Responsibilities and Rights Journal* 2 (2): 121–39. doi:10.1007/BF01384942.

Rousseau, Denise M. 1995. *Psychological Contracts in Organizations : Understanding Written and Unwritten Agreements*. Thousand Oaks, Calif. [u.a.]: Sage.

———. 2001. 'Schema, Promise and Mutuality: The Building Blocks of the Psychological Contract'. *Journal of Occupational and Organizational Psychology* 74: 511–41. doi:10.1348/096317901167505.

Rousseau, Denise M, and Sandra L. Robinson. 1994. 'Violating the Psychological Contract: Not the Exception but the Norm'. *Journal of Organizational Behavior* 15 (3): 245. doi:10.2307/2488448.

Rousseau, Denise M., and Kimberly A. Wade-Benzoni. 1994. 'Linking Strategy and Human Resource Practices: How Employee and Customer Contracts Are Created'. *Human Resource Management* 33 (3): 463–89. doi:10.1002/hrm.3930330312.

Sarup, Madan. 1988. *An Introductory Guide to Post-Structuralism and Postmodernism*. Hemel Hempstead, Hertfordshire ; New York: Harvester Wheatsheaf.

Schaufeli, Wilmar B., and Arnold B. Bakker. 2010. 'Defining and Measuring Work Engagement: Bringing Clarity to the Concept.' In *Work Engagement: A Handbook of Essential Theory and Research*, 10–24.

Schein, Edgar H. 1972. *Organizational Psychology*. Englewood Cliffs, N.J.: Prentice-Hall.

Schneider, Susan Carol, and Jean-Louis Barsoux. 2003. *Managing across Cultures*. Harlow [etc.]: Prentice Hall/Pearson Education.

Simpson, Mary, Margaret Richardson, and Theodore E. Zorn. 2012. 'A Job, a Dream or a Trap? Multiple Meanings for Encore Careers'. *Work, Employment & Society* 26 (3): 429–46. doi:10.1177/0950017012438581.

Sims, Ronald R. 1994. 'Human Resource Management's Role in Clarifying the New Psychological Contract'. *Human Resource Management* 33 (3): 373–82. doi:10.1002/hrm.3930330306.

Smith, Justin Davis. 1996. 'Should Volunteers Be Managed?'. In *Voluntary Agencies: Challenges of Organisation and Management*, edited by David Billis and Margaret Harris. Macmillan.

Spence, Michael. 1973. 'Job Market Signaling'. *The Quarterly Journal of Economics*. edsjsr.

———. 2002. 'Signaling in Retrospect and the Informational Structure of Markets'. *The American Economic Review*. edsjsr.

Spindler, George S. 1994. 'Psychological Contracts in the Workplace—a Lawyer's View'. *Human Resource Management* 33 (3): 325–33. doi:10.1002/hrm.3930330303.

Stake. 2003. 'Case Studies'. In *Strategies of Qualitative Inquiry*, edited by Norman K Denzin and Yvonna S Lincoln. Vol. 2. Sage.

Stanton, P., S. Young, T. Bartram, and S.G. Leggat. 2010. 'Singing the Same Song: Translating HRM Messages across Management Hierarchies in Australian Hospitals'. *The International Journal of Human Resource Management* 21 (4): 567–81. doi:10.1080/09585191003612075.

Stirling, Christine, Sue Kilpatrick, and Peter Orpin. 2011. 'A Psychological Contract Perspective to the Link between Non-Profit Organizations' Management Practices and Volunteer Sustainability'. *Human Resource Development International* 14 (3): 321–36. doi:10.1080/13678868.2011.585066.

Studer, Sibylle, and Georg Schnurbein. 2012. 'Organizational Factors Affecting Volunteers: A Literature Review on Volunteer Coordination'. *International Journal of Voluntary and Nonprofit Organizations* 24 (2): 403–40. doi:10.1007/s11266-012-9268-y.

Suazo, Mark, Patricia G. Martinez, and Rudy Sandoval. 2009. 'Creating Psychological and Legal Contracts through Human Resource Practices: A Signaling Theory Perspective'. *Human Resource Management Review* 19 (2): 154–66. doi:10.1016/j.hrmr.2008.11.002.

Subramony, Mahesh. 2009. 'A Meta-Analytic Investigation of the Relationship between HRM Bundles and Firm Performance'. *Human Resource Management* 48 (5): 745–68. doi:10.1002/hrm.20315.

Sullivan, Sherry E., David F. Martin, William A. Carden, and Lisa A. Mainiero. 2003. 'The Road Less Traveled: How to Manage the Recycling Career Stage'. *Journal of Leadership & Organizational Studies* 10 (2): 34–42. doi:10.1177/107179190301000204.

Tashakkori, Abbas, and Charles Teddlie. 1998. *Mixed Methodology: Combining Qualitative and Quantitative Approaches*. Thousand Oaks, Calif.: Sage.

Taylor, Rebecca, Jane Parry, and Pete Alcock. 2012. *From Crisis to Mixed Picture to Phoney War: Tracing Third Sector Discourse in the 2008/9 Recession*. 78. Informing Civil Society. Third Sector Research Centre.

Taylor, Tracy, Simon Darcy, Russell Hoye, and Graham Cuskelly. 2006. 'Using Psychological Contract Theory to Explore Issues in Effective Volunteer Management'. *European Sport Management Quarterly* 6 (2): 123–47. doi:10.1080/16184740600954122.

Taylor, Tracy, and Peter McGraw. 2006. 'Exploring Human Resource Management Practices in Nonprofit Sport Organisations'. *Sport Management Review* 9 (3): 229–51. doi:10.1016/S1441-3523(06)70027-4.

Thompson, Craig J. 2002. 'A Re-Inquiry on Re-Inquiries: A Postmodern Proposal for a Critical-Reflexive Approach'. *Journal of Consumer Research* 29 (1): 142–45. doi:10.1086/339926.

Tonkiss, F., and A. Passey. 1999. 'Trust, Confidence and Voluntary Organisations: Between Values and Institutions'. *Sociology* 33 (2): 257–74. doi:10.1177/S0038038599000164.

Torrington, Derek, L. Hall, S. Taylor, and C. Atkinson. 2011. *Human Resource Management*. Harlow, England; New York: Financial Times/Prentice Hall.

Ulrich, David. 2009. *HR Transformation : Building Human Resources from the Outside in*. Chicago: McGraw-Hill.

Vinton, Linda. 2012. 'Professional Administration of Volunteer Programs Now More Than Ever: A Case Example'. *Administration in Social Work* 36: 133–48. doi:10.1080/03643107.2011.564721.

Waikayi, Loise, Colm Fearon, Lynn Morris, and Heather McLaughlin. 2012. 'Volunteer Management: An Exploratory Case Study within the British Red Cross'. *Management Decision* 50 (3): 349–67. doi:10.1108/00251741211216188.

Walsh, Denis, and Soo Downe. 2006. 'Appraising the Quality of Qualitative Research'. *Midwifery* 22 (2): 108–19. doi:10.1016/j.midw.2005.05.004.

Wang, Paul Z. 2004. 'Assessing Motivations for Sports Volunteerism.' *Advances in Consumer Research* 31 (1): 420–25.

Warner, Stacy, Brianna L. Newland, and B. Christine Green. 2011. 'More than Motivation: Reconsidering Volunteer Management Tools.' *Journal of Sport Management* 25 (5): 391–407.

Wengraf, Tom. 2001. *Qualitative Research Interviewing: Biographic Narrative and Semi-Structured Methods*. London ; Thousand Oaks, Calif: SAGE.

Wernerfelt, Birger. 1984. 'A Resource-Based View of the Firm'. *Strategic Management Journal* 5 (2): 171–80. doi:10.1002/smj.4250050207.

Whittaker, Susan, and Mick Marchington. 2003. 'Devolving HR Responsibility to the Line: Threat, Opportunity or Partnership?'. *Employee Relations* 25 (3): 245–61. doi:10.1108/01425450310475847#sthash.vZihbi52.dpuf.

Wilensky, Ava S., and Carol D. Hansen. 2001. 'Understanding the Work Beliefs of Nonprofit Executives through Organizational Stories'. *Human Resource Development Quarterly* 12 (3): 223–39. doi:10.1002/hrdq.11.

Wilson, David. 1996. 'How Do Voluntary Agencies Manage Organisational Change?'. In *Voluntary Agencies: Challenges of Organisation and Management*, edited by David Billis and Margaret Harris. Macmillan.

Woodrow, Chris, and David Guest. 2014. 'When Good HR Gets Bad Results: Exploring the Challenge of HR Implementation in the Case of Workplace Bullying: Implementation of Workplace Bullying Policy'. *Human Resource Management Journal* 24 (1): 38–56. doi:10.1111/1748-8583.12021.

Wright, Patrick M., Benjamin B. Dunford, and Scott A. Snell. 2001. 'Human Resources and the Resource Based View of the Firm'. *Journal of Management* 27 (6): 701–21. doi:10.1016/S0149-2063(01)00120-9.

Wright, Patrick M., and Lisa H. Nishii. 2013. 'Strategic HRM and Organizational Behavior: Integrating Multiple Levels of Analysis'. In *HRM and Performance: Achievements and Challenges*, edited by J. Paauwe, David Guest, and Patrick M. Wright. Chichester, West Sussex: Wiley.

Yanow, Dvora, and Sierk Ybema. 2009. 'Interpretivism in Organizational Research: On Elephants and Blind Researchers'. In *The Sage Handbook of Organizational Research Methods*, edited by David A Buchanan and Alan Bryman, 39.

Yin, Robert K. 1994. *Case Study Research : Design and Methods*. Thousand Oaks: Sage
    Publications.

Yin, Robert K. 2003. *Case Study Research: Design and Methods*. 3rd ed. Applied Social
    Research Methods Series, v. 5. Thousand Oaks, Calif: Sage Publications.


https://www.gov.uk/government/organisations/cabinet-office/series/civil-society-
update-series


http://www.scotland.gov.uk/Topics/People/15300


http://www.civilsociety.co.uk/directory/company/2765/office_for_civil_society


http://www.oscr.org.uk/about-scottish-charities/


SCVO, 2012, Scottish third Sector Statistics 2012
 http://www.scvo.org.uk/wp-content/uploads/2012/09/SCVO-Scottish-Third-Sector-
Statistics-2012.pdf


NCVO, How big is a typical voluntary organisation
http://www.ncvo-
vol.org.uk/sites/default/files/UploadedFiles/NCVO/Publications/Publications_Catalogue/Sec
tor_Research/How_big_is_a_typical_voluntary_organisation.pdf


Welfare 'Reform' and Mitigation in Scotland Summary Paper, (2013)
http://www.scvo.org.uk/wp-content/uploads/2013/01/welfare-reform-report-part-1-
summary.pdf


http://www.scvo.org.uk/policy/sots-case-studies/public-funding-cuts-hit-voluntary-sector-
workforce-hard-new-research/


http://www.scvo.org.uk/wp-content/uploads/2010/08/SCVO_SectorStats_2010_Web.pdf


http://www.scotland.gov.uk/Topics/People/15300/charities/CurrentLegislation/CurrentCharit
yLegislation


Websites of the three studied TSOs

## Appendices

Appendix 1 Different definitions of psychological contract

| |
|---|
| 'Since the foremen realize the employees in this system will tend to produce optimally under passive leadership, and since the employees agree, a relationship may be hypothesized to evolve between the employees and the foremen which might be called the "psychological work contract".' (Argyris 1960:97) |
| 'A series of mutual **expectations** of which the parties to the relationship may not themselves be dimly aware but which nonetheless govern their relationship to each other.' (Levinson et al. 1962:21) |
| An implicit contract between an individual and his organization which specifies what each **expect** to give and receive from each other in the relationship.' (Kotter 1973:92) |
| 'The notion of a psychological contract implies that there is an unwritten set of **expectations** operating at all times between every member of an organization and the various managers and others in that organization.' (Schein 1980: 22) |
| 'The term psychological contract refers to an individual's belief regarding the terms and conditions of a reciprocal exchange agreement between the focal person and another party. Key issues here include the belief that a **promise** has been made and a consideration offered in exchange for it, binding the parties to some set of reciprocal **obligations**.' (Rousseau 1989:123) |
| 'In simple terms, the psychological contract encompasses the actions employees believe are expected of them and what response they **expect** in return from the employer.' (Rousseau and Greller 1994:386) |
| 'The psychological contract is individual beliefs, shaped by the organization, regarding terms of an exchange agreement between the individual and their organization.' (Rousseau 1995:9) |
| 'The perceptions of both parties to the employment relationship, organization and individual, of the obligations implied in the relationship.' (Herriot and Pemberton 1997:45) |
| 'An employee's beliefs about the reciprocal **obligations** between that employee and his or her organization, where these obligations are based on perceived **promises** and are not necessarily recognised by agents of the organization.' (Morrison and Robinson 1997:229) |

*Adapted from Conway and Briner 2005, pp.21-22*

## Appendix 2 Shifts in Organisational research paradigm

| | |
|---|---|
| 1960s –late 70s | **Emergent debate on 'paradigm-plurality'**<br>"A behaviourists-functionalist approach came to dominate the social sciences, organisation studies included. (Kuhn, 1970; 1962; Burrell & Morgan, 1979)…Rather than manifesting a single, overarching paradigm, organizational studies theoretical arguments reflected a set of underlying methodological presuppositions, each with its own ontological and epistemological perspectives" |
| Late 1970s – 80s | "…the key dimension of organizations was their structure, building on Weberian bureaucratic and public administration ideas concerning hierarchical levels, spans of control, position definitions and tasks, and so forth (e.g. Astely and Van de Ven, 1979; Burrell and Morgan, 1979; Bolman and Deal, 1984; Morgan, 1986)"<br>**Diverse organisational studies, more division by theoretical differences – e.g. sociologically informed 'organisational theory' vs. (socio) psychologically informed 'organisational behaviour'**<br>"…the enhanced level of general political activities in the 1970s generated its organizational studies counterpart in a more complex human relations theory, putting contesting interests, power, and negotiation at the centre of analytic focus in a way that accommodates neither human relations theory's emphasis on the dysfunctionality of conflict nor structural and systems theories' ideas about authority and control." |

| | American Perspectives | European Perspectives |
|---|---|---|
| 1980s – 90s | **American Perspectives**<br>Organisational research was dominated by business orientation.<br><br>Quantitative methods emphasis i.e. **survey research**. Studies of organisations in public and non-profit sectors were 'quarantined from business management curricula'. | **European Perspectives**<br>Organisational Research was less dominated by business orientation "…organizational analyses both included treatments of the political within organizational life, and held on to a participant-observer, ethnographic, meaning-focused '**case study**' approach (e.g. Lipsky, 1980; Ingersoll and Adams, 1992; Burrell and Morgan, 1979; Lammers, 1991 [1983])". While European and British scholars in organisation studies did not separate studies of organisations in public and non-profit sector from business and management field. |

| | |
|---|---|
| 1990s – recent | **A tendency of a merged vision in organisational studies**<br>"The new appreciation in the US for epistemological polyphony, joined with European visions of organizational symbolism, enabled a shift in the vision of organizational studies as a science in search of an overarching theoretical paradigm that was ontologically realist, epistemologically objectivist, and procedurally following 'the scientific method'. The awareness of divergent and contradictory philosophical presuppositions underlying organizational analyses not only provided useful ways of reconceptualising the history of the field's ideas as a contending set of theorist each vying for dominance. It also marked a crucial step in a fundamentally different way of thinking about theories and theorizing – and about methodologies and methods. This 'crucial step' can be narrated from at least four different angles. Each narrative casts the role of interpretivism in the field of organizational studies somewhat differently." |

Adapted and summarised from Yanow & Ybema (2009) in Buchanan & Bryman [ed]

Appendix 3 - Categorising themes and sources generated from initial study and literature Review

| Key words (themes appeared) | Source – literature review or empirical data |
|---|---|
| 1. Communication (btw coordinator and volunteers) | - Empirical data (interviews with Learning and Practice Officer VCE<br>- Befriending coordinator and both sitter coordinators) |
| 2. Respect of free will for volunteering | - Jaeger et al. (2009) |
| 3. Reciprocity of expectation | - Rousseau (1995)<br>- Conway & Briner (2005)<br>- Empirical data (interview with sitter coordinator B) |
| 4. Building Relationship | - Empirical data (interviews with volunteer coordinators)<br>- Stirling et al. (2011) – link between volunteer management practices and volunteer retention(looking at the impact of transactional and relational expectations) |
| 5. Professional volunteer management (HR approach) | - Empirical data (interview with L&P officer VCE; coordinator C)<br>- Vinton (2012)<br>- Connors (1999), cited in Jaeger et al. (2009)<br>- Coyne and Coyne (2001)- emphasis volunteer retention in golf tournaments (short term volunteer but repeating on regular basis) |
| 6. Uniqueness of managing volunteers (different from managing employees) | - Jaeger et al. (2009)<br>- Empirical data (interviews with sitter coordinators) |
| 7. **Various levels of Recognition** | - Jaeger et al. (2009); |

| | |
|---|---|
| 8. Boundary (difficulties of setting clear boundary) *The term is mentioned by more than one coordinator when they talk about what is considered important information to be given during initial training. 'Boundary' seems to refer to the fine border line between work and personal life; as the approached TSOs deliver social services to disadvantaged people, the coordinators perceive it important not to let volunteers be emotionally over influenced. This could be interpreted as a way of protecting the volunteers at their workplace while they are not taken away by their clients' unfortunate life stories. In addition, neglect of boundary is perceived to cause volunteer turn over due to the high level of distress from volunteering. | - Empirical data (interviews with sitter coordinator B) <br> - Pearce (1993) uses the term to describe one of volunteer's behaviour at workplace. <br> - Jaeger et al.(2009) |
| 9. Motivation | - Empirical data (interviews with befriending volunteer; interviews with VCE officer, volunteer coordinators) <br> - Clary et al. (1998); Allison et al. (2002) – categories of volunteering motivation <br> - Kim et al. (2010)-the study focused on the volunteers in sporting organisation, although findings could be generalised. |
| 10. Obligation/responsibility | - Empirical data (interviews with befriending volunteer; volunteer coordinators) |
| 11. Professionalised (training and development) | - Vinton (2012) |
| 12. Formal structure (planning and implementing) | - Survey results |
| 13. Irrelevance of formal structure | - Empirical data (interviews with befriending coordinator) |
| 14. Satisfaction | - Warner et al. (2011)-consider volunteers as customers, thus applied theoretical discussion over customer satisfaction to approach the study <br> - Clary et al. (1998) |
| 15. Change of expectation (influenced by volunteering hence the change of expectation) | - Empirical data (interview with befriender volunteer) <br> - Warner et al. (2011) <br> - De Vos et al. (2003) |

| | | |
|---|---|---|
| 16. **Influence of leadership style (perception)** upon volunteer management planning and implementing | - | Empirical data (interview with sitter coordinator A) |
| | - | Wilensky and Hansen (2001) |
| | - | Hansen and Kahnweiler (1997)- the study did not explicitly focus on TSO leaders, however, it still provides evidence of suggesting the leadership influence over organisational culture and working environment |
| 17. Reliance of volunteer and organisation (obligation implementing) | - | Rousseau (1995) |
| | - | Empirical data (interview with befriender coordinator – expenses claim) |
| 18. Interpretation of contract terms | - | Rousseau (1995) |
| 19. Personal experience/background and its influence over volunteer management approaches/perceptions | - | Empirical data (interviews with coordinators – all had various background hence different emphasis over the key factors to volunteer management) |
| 20. Volunteer crucial to small TSOs | - | Jaeger et al. (2009) |
| 21. Volunteer behaviour within TSO | - | Pearce (1993) |
| | - | "Volunteers have no monetary (or legal) reason for joining or staying with the organization. This creates a unique pressure for an organization that depends on volunteer work due to the awareness that their members could abandon the organization at any time (Pearce, 1982)" (Jaeger et al., 2009, p.82) |
| | - | Jaeger et al. (2009) |
| 22. Perceived contribution of Psychological contract to managing volunteer relations | - | Farmer and Fedor (1999) |

Appendix 4 Interview question guide for CEO

1. Could you talk about your previous experience before becoming the CEO of this organisation?
2. What made you choose to work for this organisation?
3. How much of your previous experience and skills helped you carry out this role?
4. Could you talk about your job involved as CEO?
5. Have you made any changes in terms of governance when you became the CEO? What and why are the changes if any?
6. What are the aspects do you consider when you form strategies for the organisation?
7. So far, what would you consider to be achievements working as the CEO?
8. Have you encountered any challenges? What are they?
9. How do you perceive volunteer contribution?
10. How do you embed volunteer work into the organisational strategy?
11. In your view, do volunteers often seek recognition on their work? Why do you think they need this from the organisation?
12. In your view, what are the practices the organisation needs to have to better manage and support volunteers?
13. How do you perceive 'boundary'? In your view, how could this 'boundary' be clearly divided as the organisation?
14. What is your ideal organisational structure, in terms of the proportion between paid employees and volunteers? How feasible to achieve such ideal balance?
15. What is your long term vision on the organisation? (What is your long term plan?)
16. In your view, what could TSO CEO do to better sustain the organisation while achieving respective organisational objectives?

Appendix 5 Interview question guide for VC

1. Could you talk about your previous experience before becoming the coordinator of this organisation?
2. What made you choose to work for this organisation/as volunteer coordinator?
3. How much of your previous experience and skills helped you carry out this role?
4. Could you talk about your responsibilities as coordinator?
5. Out of your job responsibilities, which one do you think it vital to enabling to carry out your work? By which, it refers that underestimate or ineffectively carrying out these three responsibilities would result in high level of turnover of volunteer sitters or even conflicts.
6. Are you responsible for drafting and reviewing policies and procedures regarding volunteer management? If yes, what areas do you always consider to draft/review these documents?
7. What are the aspects do you consider when you manage volunteer on daily basis?
8. How important do you think it is for volunteers to fully understand the information provided on volunteer agreement?
9. How do you perceive the contribution of your role as volunteer coordinator to the organisation?
10. How do you perceive 'boundary'? In your view, what is the role of the organisation in ensuring the clear separation of boundary?
11. In what aspects does the organisation involve volunteers? In average, what are the demographic characteristics of volunteers? What are the most common motives for them to volunteer here?
12. In your view, how do volunteers contribute to organisation strategy implementing?
13. How do you keep volunteers engaged?
14. Do you think it important to show recognition of volunteers' work? Why?
15. Have there been any difficulties in seeking and/or retaining suitable volunteers? Examples?
16. Have you ever turned down someone? How important do you think of volunteer selection?
17. If any, could you talk about situations when you had to deal with problematic volunteers? i.e. someone who did not perform according to the agreement, or someone who simply did not show up for service delivering without notifying you.
18. To look into the future organisational development, what are the areas would you want to improve/change in volunteer management? Why?

Appendix 6 Interview question guide for volunteers

1. How did you start volunteering? Is this your first volunteer work? How long have you been volunteering with this organisation?
2. What did you do before you started volunteering work? What do you do outside volunteering now?
3. What were the reasons why you chose to work for this organisation?
4. What do you hope to gain/achieve by volunteering? Have you achieved them?
5. Were you aware of the organisational objectives and/or mission statement? How did you find out about the information?
6. Do you have a client at the moment? If so, could you tell me about your client and what do you usually do with him/her?
7. Who is your first point of contact at the organisation? Could you talk about your role as the volunteer?
8. How much do you know about how the volunteer management policies and practices? What are they? In your view, how necessary do you think the organisation has these policies in place?
9. What is your understanding of 'boundary'?
10. Have you made any suggestions to the organisation regarding service improvement or operation optimising? Who did you talk to? Were there any follow ups from that?
11. Does volunteer work take up a lot of your time every week?
12. Do you have any future plans once your volunteering work is ended? What are your plans?
13. How much has your volunteer work influenced your future plans?
14. What do you consider to be the biggest achievement/satisfaction by working as volunteer so far?
15. How important is it for you to volunteer? Why?

## Appendix 7 Summary form for document study

Organisation:

Document:

Date received:

Name or description of document:

Event or contact, if any, with which document is associated:

Significance or importance of document:

Brief summary of contents:

# BEFRIENDING AGREEMENT

BEFRIENDING PROJECT recognises the valuable and important contribution made by befrienders and seeks to establish a formal relationship based on mutual trust and responsibility. This agreement clearly states what is expected of both parties with the aim of safeguarding the interests of both.

Befrienders are part of the          team and, while they are not employees and do not receive financial remuneration, they will be treated fairly and equably as employed staff could reasonably expect to be treated by

BEFRIENDING PROJECT volunteers will receive:

- 'induction' training and ongoing training and development opportunities
- volunteer handbook/policies/procedures/guidelines.
- supervision
- ongoing support in carrying out their befriending role,
- a regular appraisal and feedback on their role,
- the opportunity to contribute to developments in the befriending service.

## Training

Befrienders will have successfully completed the induction training programme. Induction training is designed to:

- provide basic information and to raise awareness of some of the potential issues for people with physical disabilities:
- enhance existing skills;
- promote participants abilities in working with sensitivity and on their own initiative in one-to-one situations, providing support to people in home or community settings.
- Provide volunteers with all relevant policies and procedures

Befrienders are encouraged to participate in the ongoing programme of training and development sessions, which offers;
- Group debate and discussion,
- Workshops / seminars / information updates,
- Consultation on developments within the befriending project service,
- The opportunity to meet and socialise with other befrienders.

## Matching

The matching process will be explained during meetings with the project manager.

Once a successful match has been made the befriender has a duty of care to be responsible and respectful of their befriendee.

Activities during the visit must be risk assessed and agreed by the project manager.

## Commitment

Befrienders are expected, but not obliged, to commit to a minimum of two hours per week for the period of one year.

## Support and Supervision

Befrienders are expected to make use of other support structures by;

- Attending regular supervision, the frequency of which is individually negotiated with the befriending project manager.
- An appraisal will be carried out 6 monthly. This will involve feedback from the befriender, befriendee and project manager.
- Making use of the informal support offered by the project manager for additional support on an ongoing basis as required.

Befrienders are encouraged to join and attend focus group meetings. The frequency will be decided as the project evolves. These facilitated meetings enable befrienders to give and receive peer support, as well as providing an opportunity to meet each other in a social setting.

## Changes in Personal Circumstances

Befrienders are expected to inform the project manager of any significant changes in personal circumstances, particularly where this may impact on the support they provide to their client.

## Leave of Absence

Befrienders are requested to discuss plans for leave of absence with the project manager as a courtesy to the befriendee.

Periods of extended leave *may* require the befriender to undergo refresher training.

Following the death of a client, a minimum three-month 'resting' period is advised before a befriender would be expected to be actively involved again.

## Exit

There may come a time for many reasons where a befriender has to leave the project. In this situation befrienders should, wherever possible, inform the project manager with reasonable notice so the ending can be managed sensitively.

## Insurance

Befrienders are covered by          insurance policies in respect of their role within the organisation, *exclusive of loss and damage of personal possessions.*

**Expenses**
Please see the　　　　　Befrienders' Expenses Policy.

**Terms and Conditions**
Befrienders are expected to observe, and work within the spirit and framework of, relevant　　　policies and procedures which will be covered in training and provided in the Volunteer Handbook

**This Befriending Agreement is not a contract and in particular is not a contract of employment and this document does not make the volunteer an employee of　　　or create any other contractual relationship between the befriender and**

**I have read, understand and agree to the terms laid out in this Befriending Agreement.**

Name of Befriender in capitals……………………………………………………

Signed: …………………………………………………………………………..
(Befriender/volunteer)　　　　　　　　　　　　date:　　/　/

Signed
:……………………………………………………………………………………
( Project Manager)　　　　　　　　　　　　date:　　/　/

Appendix 9 Volunteer participant profiles by TSO – Age IT, EC Support, and EL Centre

| | Gender | Experience (years) | Age group | Current Occupation | Previous occupation | type of volunteering role | Type of involvement |
|---|---|---|---|---|---|---|---|
| **AI1.** | F | 2 years | 50s | Early retirement | IT technician at Standard Life | Moose Volunteer, recently started class help as well. In addition, she also volunteers at Council Library, and doing dog walking for Dog Trust Organisation outside Edinburgh | once a week |
| **AI2.** | F | 4 years | 50s | Part time Admin at British Psychology Institution | Psychologist with PhD | Moose Project Volunteer, also has various other volunteering involvement with other organisations | once a week |
| **AI3.** | F | 2 years although she was with ACE IT for 6 years | 60s | Qualified dietician, doing freelance session on therapy | Dietician manager | ACE IT class help volunteer. Previously class teacher, recently finished paid work and changed to volunteering role | once a week |
| **AI4.** | F | 2 years | 70s | Retired, joined ACE IT Board about a year ago, invited by the CEO | Education manager helping disadvantaged youth find work replacement | Moose volunteer. | once a week |
| **AI5.** | M | less than 1 year | 50s | Retired from own business in USA and moved back to Edinburgh in 2009. | Had own sound studio business | ACE IT class help volunteer. In addition, also volunteers at Waverley Care as receptionist and Local Library doing 'Read aloud'. Moreover, he has had volunteering experience for more than 2 decades, and went to Uganda in 2010 for 7 weeks as a self-financed volunteer helping disadvantaged children | Once a week |

| | Gender | Experience years | Leaving soon | Ex-client | Age group | Current Occupation | Previous occupation | Type of involvement |
|---|---|---|---|---|---|---|---|---|
| EC1. | F | 1 | | | 30s | Full time Mother of 3 | Worked for Visiting Scotland | once a week |
| EC2. | M | 2 | | Yes | 40s | Unemployed | Public Sector | Once a week |
| EC3. | F | 1 | | | 20s | Research Fellow (just submitted PhD thesis) | Student from China; did study exchange in S. Korea during UG study in China | Once a week |
| EC4. | M | 3 | | | 60s | Unemployed | A job for over 40 years and was made redundant at the age of 57 (2009) and started volunteering since | Once a week, he has 2 clients through ECAS |
| EC5. | M | 1 | Intention to terminating the match under mutual agreement (the befriendee intended to become befriender). | | 21 | 4th year UG student at UoE | Has little formal work experience, but was a freelance tutor in Austria. | Once a week |
| EC6. | F | 2 | | | Late 20s | Working at CSV Edinburgh reviewing volunteering recruitment model, contract work (almost full time). Also volunteering in 3 organisations, 2 conservation organisations and ECAS; but ECAS volunteering is the frequent one, while the other two are 2-4 times a year. | Approx. 8 years' work experience in volunteer management through different organisations as work was contract based. Graduated with degree in Business Studies and initially worked as a buyer, but was not satisfied with the work, therefore, went on looking to work in non-profit organisation thus remained in the sector. | Once every 2 weeks, |

|      | Gender | Experience (years) | Age group | Current Occupation | Previous occupation | type of volunteering role | Type of involvement |
|------|--------|--------------------|-----------|--------------------|--------------------|--------------------------|--------------------|
| **EL1.** | F | 2+ | 60s | Retired | Facility Manager | Café | 4 hours per week |
| **EL2.** | F | almost 1 year | 50s | Early retirement | Accountant | Tot's Tog 2nd hand Clothing shop | 5.5 hours per week, with occasional extra work |
| **EL3.** | M | less than 1 year | 50s | Currently no work, but volunteering to prepare him to return to work. In addition, volunteering at Day care in Open Door in Morningside, trustee in another Open Door outside Edinburgh | Owner of architecture consulting firm | Maintenance | Every 2 week in general, but sometimes comes in by own initiative. The role did not have specific committed hours. |
| **EL4.** | F | 3 years previously when café was open, then left when it was closed. Was asked to join the newly opened café since June | 30s | Working for her brother in housing cleaning and childcare 1 day a week in Glasgow. | More experience in volunteering work in café, worked in Scottish & Newcastle for 3 years (7 years ago) | Café volunteer, helping with Day Care Centre Lunch on Fridays | 2 days a week (Monday and Friday), but often does extra shifts on Wednesdays if needed |
| **EL5.** | M | 2 years | 60s | Retired medical professionals, moving back to Edinburgh after retirement and started volunteering since. | Medical professional | Day Care Centre; also volunteering at Victim Support Scotland in Edinburgh office supporting victims | Every Friday morning at Eric Liddell Centre |

Appendix 10 CEO and VC participant profiles by TSO

| TSO | Age IT (est. 2001) | |
|---|---|---|
| **Title** | **AI-CEO** | **AI-VC** |
| | 50s; Female | 50s; Female |
| | Founder and CEO of the organisation. She is involved in almost all aspects of the operation. She is the main fundraiser. She manages computer training class volunteers. She has direct influence in choose non-executive board ("handpicked the members") | Recruited by the CEO as outreach project manager. She is mainly responsible for all aspects of the project including volunteers on the project. She had previous involvement with the organisation through previous work. |
| **Previous sector** | Entrepreneur, had own catering service in England before setting up Age IT. Private sector | Volunteer recruiter in another TSO which helped TSOs to recruit older volunteers |
| **Previous Occupation** | General management (started as a management apprentice in a retail store) | Social worker |
| **Influential life events (if any)** | Mother was ill, and the family received kind support from a TSO. | |

| TSO | EC Support (est. 1902) | | |
|---|---|---|---|
| **Title** | **EC-CEO** | **EC-VC manager** | **EC-VC Coordinator** |
| | 50s; Male | 30s; Female | 40s; Male |
| | Joined the organisation in 2004. Has been involved in the sector as a volunteer and a member of management team. | Joined as the befriending project manager in 2009. She reviewed VM policies and practices. Prepares for befriending project section in annual reports. | Joined as befriending coordinator in 2012 on part time basis. Free-lance counsellor. He has been a volunteer since his 20s. |
| **Previous sector** | Third sector, Public sector | Third sector | Public sector |
| **Previous Occupation** | Engineer at Royal Navy, with managerial responsibilities | Studied zoology. Has been working in conservation TSOs as project coordinator. | Studied psychology, a qualified counsellor. Worked as a small business consultant |
| **Influential life events (if any)** | On-going involvement in volunteering and the sector | Interested in supporting disabled | Family influence in volunteering |

| TSO | EL Centre (est. 1980) | | |
|---|---|---|---|
| **Title** | **EL-CEO** | **EL-VC** | **EL-Project Manager** |
| | 50s; Male | 30s; Female | 40s; Female |
| | Religious influence to enter the sector from early years. He has been with the centre for 18 years, and 15 years as the CEO. | Joined the centre about 1 year ago. She was appointed as both 'Volunteer manager' and a project manager looking after 'Ca(i)re' project | She re-joined the project as the manager. Previously worked on the project as a member of staff but left. She is only responsible for VM on the project. |
| **Previous sector** | Third sector | Third sector | Third sector Public sector |
| **Previous Occupation** | General management | Support worker | Qualified Psychiatrist Nurse |
| **Influential life events (if any)** | Religious influence | | |

Appendix 11 - additional interview quotes

"…by 2012 I started to get a little bit more energy and I started to think about trying to go back to work and so I gradually did … Well, we got a dog… to make sure that my hours were better and then gradually build up to a number of days and a number of different small voluntary positions. It's been very fortunate for me to get where I am and I'm very happy about the whole thing. I don't intend to work as an architect again. So I'm interested in maybe helping people with their buildings, to manage them and maybe procure architectural services, that sort of thing.

…

I've always had some volunteering things. My company was involved mainly in public sector and health-type things. So I always wanted to work to help people, as an architect, and I did lots of health buildings. And so I did charity work, but mainly for like organisations like the RIS, which was a membership organisation but I would be helping in various ways with that. And being the president is unpaid. So that was about 2 days a week. And I was also involved in Edinburgh Junior Chamber of Commerce and that did projects, but that was a long, long time ago.

…

It's to help me build up my stamina. And it's also to help me build up my CV and show any prospective employer/employers that I actually am able to attend work as well, yes."

(Building maintenance volunteer EL3, EL Centre)

"I read about this group coming to Dallas to Border's Books, which they used to have a Border's Books here but they don't any more. But it's an American company and it was a group of orphans that were coming to perform at the store, the book store, and I thought 'Ah...' I just made up my mind that if I can help them, by recording them, I'll do that. And so they came and I was expecting this little, raggedy, forlorn group, you know, just like rags and looking really...And, oh, it was unbelievable because here they come, just these beacons of light with big, shining grins, these colourful costumes and the most amazing dancing and music – it was just incredible, just touched my life, just so amazing. So I went up to the lady in charge, who was an American, and I asked her if she had any tapes, and maybe would like me to record them, and of course in the beginning she was a bit apprehensive because she was like protective, understandably, but I said 'Well we could record them at my son's school, a very reputable school' and so we did. And that was the start, and they came over from Uganda every 2 years to raise money and raise awareness of Aids, because they were all orphans because of Aids. And so eventually, in 1999, New Year's Eve, I went to Uganda, and it was pretty amazing to be there at that time, going into the new

millennium and all these crazy people in Texas and America in general, who react, as usual, much bigger."

<div align="right">(IT Class volunteer AI5, Age IT)</div>

**Interview quotes 7.1 (p.178)**

"I would say my expectations are a lot lower, of the volunteers. I don't expect as much out of them. I expect appropriate behaviour; I expect them to work if they say they are going to come in. I expect them to be able to engage with my clients, who are not always the easiest people to work with, and it's not everybody can do it. But if they take weeks off to visit a relative the other side of the world, you just have to accept that! Because they're volunteers. So my expectations are lower. I mean my staff wouldn't be allowed to do that! But the volunteers can."
…

I mean they don't have to have any professional training to do what…
A volunteer doesn't have to have any professional training. And to be honest, my staffs don't need a lot of professional training to do what they're doing either… when I'm recruiting staff; I tend to look for attitude. People that I think bring something to my team, actually their background isn't that important – I look for people that I think are going to fit in well with the team and are going to get on well with the client group.
…

If I've got somebody who is really keen but has no experience of working with people with dementia, what I would maybe do is bring them in for a few weeks to let them see what it's like. Because, as I say, it doesn't suit everybody and people find it stressful sometimes.
…
But I have to say, most people do want to stay. We've got a reputation as being a really friendly team, and people enjoy being part of a team."

<div align="right">(Day-care centre manager, EL Centre)</div>

**Interview quotes 7.2 (p.193)**

"I started off managing volunteers as a volunteer first of all, as a volunteer officer with BTCV Scotland, … my background is actually something very different from what I do now; I studied zoology at the university, so initially I wanted to get into wild life and conservation area. … after I graduated, I did my volunteering myself with BTCV where I was taking out groups of volunteers to community to do conservation work once a week. And then basically kind of got my first paid job which was Lancashire Wildlife Trust which was an education job, … very hands on working with people and working with schools, doing, developing resources and running a lot of training events and things like that, which really made me realise I wanted to work with people. … after that I worked for Face Their Scotland on a

community base project which is all about managing volunteers across Scotland, Scotland nationwide project, we had a 30 odd volunteers in different communities across Scotland that we arrange training for them, printing materials for them to go out into their own communities and they, for them to run workshops on environmental awareness and things on waste reduction. And yes, so it was this job that I kind of just [move] into a different sector in using the same kind of skills and experience of my past jobs…"

(Befriending Project manager, EC Support)

"For a quite few years, I worked in small business advice, giving advice to small businesses. I worked for 10, 15 years with Scottish Enterprise, in Economic Development. I worked for a branch in the Borders. Yeah, it was kind of business advice, things to do with small business."

…

"when I was a student, my mother was involved in a kind of club in part of Glasgow, quite a poor part of Glasgow, and it was to help people with basic things and gave them something to come to, where they could have a bit of fun, maybe learn things, too. And I also helped at Christmas giving money and I think Christmas presents and things. … and a group of us got together and we organised a week's holiday for the kids helping the mothers' came along to that club."

(Befriending Project assistant, EC Support)

"So after I graduated in 2002, I worked for another charity – Capability Scotland. I've always worked in the charity sector, so I was there for 3 or 4 years and then I went away to travel and when I came back I joined Age Scotland. Again, you know, third sector organisation with particular focus in older people, and older people's services. Again, I was there for around 3 years and then I joined here…"

(Volunteer manager, EL Centre)

"When I left school I did a degree in psychology at Edinburgh University and as summer vacation employment I worked as a nursing assistant at a local psychiatric hospital in Edinburgh and I liked it so much that I left with my ordinary degree and started my nurse training – psychiatric nurse training. So I was a psychiatric nurse for about 20 years and I'm still on the nurse register, but I worked in various roles as a nurse, up to quite senior management with Lothian Health Board, and then I started having children! So I didn't work quite so hard and I worked in a nursing home for 7 years on night shift and then I went to Napier and did a health studies and health promotion course. I got advanced standing because of my previous study – I've got an honours degree in health promotion. So then for a year I worked with Midlothian Council in the social work department, in the policy and planning, and then I came here to work as a senior day care officer and I worked here for a while,

got a bit tired of it, went back to nursing, did that for a while and then the manager's post became vacant here so I applied for it and got it."

<div align="right">(Day-care Centre manager, EL Centre)</div>

"Well I trained initially as a social worker and I was in social work for approximately 10 years, did a variety of things: worked as an educational welfare officer in London; also worked for Save the Children in Edinburgh at a school for children with emotional and behavioural difficulties.  And then I retrained as a library and information worker and I worked in information retrieval in the disability sector and also for Age Concern Scotland.  And really I came into volunteer management after I was made redundant from Age Concern Scotland and I was looking for another post that kind of could use my skills and which I could get a job at!  Because I think librarianship has seen a big, big change because everybody else has become more proficient at using the internet and things, sort of role has changed a lot.  So I got a job with RSVP, which was part of Community Service Volunteers and that was my first experience of really going out and recruiting volunteers on a big scale, and that also brought me into contact with this project – Moose in the Hoose.  Which had just been running for about 6 months when I got there, and then been recruiting quite  a number of volunteers sort of 2 or 3 years after that. So I've had a lot of experience of this particular project but throughout my life I've used volunteering, well right really from school.  I was in the guides and I volunteered in an old people's home when I was a guide.  When I left school I was a volunteer in a kibbutz in Israel.  When I left university and couldn't get a job I was also a CSV volunteer at a residential school."

<div align="right">(Project manager, Age IT)</div>

**Appendix 12 Survey questionnaire used in initial study – retyped**

**Section 1**

1. Does your organisation involve volunteers?

   Yes             No (Thank you for your participation)

**Section 2: About your organisation**

2. Broadly speaking, which sector does your organisation belong?

   Public sector   Private sector  Third sector

2a. What are your organisation's core business activities? _____

3. Please select the types of the service your organisation provides.

   Not applicable (tick this if your organisation is in private sector)
   Adult learning support          Animal care
   Childcare/Child protection     Community Service
   Disability support      Educational support   Elderly care/protection
   Employment support  Environmental support and protection
   Heritage maintenance Local authorities/government
   Medical/Health care   Primary and secondary educational support
   Recreation      Religion related          Social care
   Youth care/support     Vulnerable groups support

4. Please indicate the size of your organisation; this is based on the number of people working in the organisation including both paid employees and volunteers.

   Less than 20 people    21-100          101-200          201-500
   501-1,000      1,001-2,000    2,000+

5. Please indicate your organisation's MAIN source of funding.

   Scottish government          Local authorities i.e. Council
   Other funding parties including individuals
   Through regular fund raising events
   Through charitable retail      Self-support through revenue

**Section 3: About you**

6. What is your job title? _____

7. How long have you been working for this organisation?          0-5 years
   5-10 years      11-15 years    More than 15 years

8. Which sector have you worked in before joining this organisation?
Public sector   Private sector  Third sector
This is my first job (please go to next page)

8.a. Which of the following(s) describe your professional background?
Accounting/Book keeping     Administration/secretary      Art     Architect
Business consultant   Educational professional      Engineering   Finance
General Management  HRM/Personnel      IT/Web support
Marketing/PR          Medical professional
Professional training/coaching/mentor

**Section 4: Information about the volunteers in your organisation**
9. What percentage of your total workforce is made up of volunteers? ___

10. Do you require your volunteers to work for a minimum period of time?
Yes    No

10.a. (If yes) What is the minimum period?
Up to 3 months        3-6 months     6-12 months   more than 12 months

10.b. Please indicate the percentage of the volunteers who have completed the required minimum work period in your organisation.
Up to 25%     25-50%        50-75%        75-100%

11. Which area(s) within your organisation do volunteers work in?
Book keeping          Employee training and development facilitating
Event organising      Financial planning/budgeting (central level)
Public Relations (PR)        Receptionist   Retail/sales
Service related specialist      Technical support (maintenance)

11.a. Out of the above selection, please write down the top 3 areas (in order) where volunteers work in the most

**Section 5: Volunteers recruitment and selection**
12 How does your organisation recruit volunteers?
Through local volunteer centre              Own website advertising
www.volunteerscotland.org.uk               www.goodmoves.org.uk
    www.charityjobs.co.uk              Informal referral (word of mouth)

13. What does your organisation have in place to recruit and select volunteers?
Standard application form     CV and covering letter screening
Reference check      Short-listing process
Written information regarding responsibilities, selection criteria and benefits

Standard interview procedure with prepared questions
Informally recruit and select volunteers

14. At which stage do you provide information about the organisation and its mission and value?

On the recruitment advertisement      At the interview (formal or informal)
during volunteer induction                During initial training period

15. Overall, how easy does your organisation find it to recruit volunteers?
Very easy      Easy    Not easy

**Section 6: Volunteer management**

16. What are the volunteer management practices does your organisation use?
Induction session
Regular performance review or similar performance measures
Training and learning          Off the job training
networking support to connect internally/externally
Recognition of contribution/records of work undertaken
none    Other (please specify)

17. For both question 17 and 18, please read the following statements and choose an answer that best reflects your view. The scale is set from 1 to 5; 1 being 'totally disagree' and 5 being 'totally agree'. If the statement does not apply to your organisation, please select 'N/A'.

Options:      Totally disagree      Disagree
neither disagree nor agree
Agree  Totally agree  N/A

17.a. In our organisation, more than 50% of the work relies on volunteers' contribution

17.b. Our organisation finds it easier to find volunteers with suitable professional skills than to find similar paid employees

17.c. Our organisation recognises the importance of volunteers' contribution

17.d. Volunteers are expected to add value to the quality of service delivered in the same way as paid employees.

17.e. When we are selecting volunteers, we prefer to have someone who has relevant experience and the required skills and knowledge.

17.f. Volunteers are considered as vital assets of the organisation.

17.g. Volunteers in the organisation are always required to participate in regular work-related meeting.

17.h. We always inform volunteers of all updates/changes concerning the sector and organisational development.

18. The following statements focus on exploring the approaches the organisation adopts to manage volunteers.

18.a. Our organisation focusses more on arranging various tasks to cater for volunteers' expectations.

18.b. We treat volunteers equally to paid employees in training and development

18.c. We use the same performance management policies on volunteers and paid employees.

18.d. Our organisation perceives the volunteer coordination as a key linking role between the volunteers and the organisational development/clients.

18.e. The volunteer coordinator in our organisation is provided with relevant management training in order to effectively carry out the role.

18.f. The volunteer coordinator in our organisation has extensive professional experience in people management/HR management.

18.g. We would prefer to have volunteers who do not simply want to fill in their unemployment gap.

18.h. It would be more helpful to have more volunteers with specialised skills and knowledge.

18.i. Formally managing volunteers helps better engage volunteers in the organisation.

18. j. Using volunteers helps to save cost.


19. Please provide any other comments regarding volunteer involvement in general. ____


**Section 7: Follow-up – Express interest in the research**

20. I am interested in receiving the survey findings.  Yes No

20.a. Please leave your email address or preferred contact method.

21. I am interested in participating in case study during second stage of the research
        Yes    No

**Appendix 13 A full lists of volunteer involved activities (survey responses)**

| | |
|---|---|
| **Book keeping:** | 8 |
| **Employee Training and development facilitating:** | 6 |
| **Event organising:** | 14 |
| **Financial Planning/budgeting (central level):** | 2 |
| **Fund raising:** | 13 |
| **General administration:** | 18 |
| **General physical labour work:** | 5 |
| **HRM/personnel management:** | 2 |
| **IT/web support:** | 5 |
| **Marketing activity planning (central level):** | 5 |
| **Public Relations (PR):** | 3 |
| **Receptionist:** | 7 |
| **Retail/sales:** | 5 |
| **Service related specialist:** | 6 |
| **Technical support (maintenance):** | 1 |
| **Other** *(please specify)***:** | 18 |

| |
|---|
| Adult Literacies |
| Be-friending, Translating |
| Befriending |
| Befriending / Peer support |
| Befriending, Driving, Gardening, Help in Cafe, Group Work |
| Carer Support |
| Centre Safety Guide |
| client assistance - transportation |
| Computer training tutors, Moose Volunteers in care homes introduce older people to computers |
| counselling and crèche |
| Day care Support and befriending |
| gardener, handyperson |

**Appendix 14 Lists of codes**

| Psychological Contract 'promises' by different actors | Promise |
|---|---|
| CEO (reflected from both individual and organisational structure) | **Promise CEOPI, TSO** |
| 1. TSO needs volunteer to operate | Promise TSO needs volunt |
| 2. CEO expectation on volunteer commitment (based on TSO needs) | Promise CEO expt on volunt |
| 3. CEO promised commitment to volunteer (based on TSO available resource) | Promise TSO RBV persp |
| 4. CEO perception influences management style | Promise CEOPI on mgt style |
| 5. CEO perception shapes TSO culture | Promise CEOPI on TSO cult |
| 6. CEO perception influences people relationship | Promise CEOPI on plp relat |
| 7. CEO perception influences the level of strategic approach to VM establishment | Promise CEOPI on Strat VM est |
| 8. CEO perception influences VM practices adoption | Promise CEOPI on VM adpt |
| 9. CEO perception influences VM style (formal, informal) | Promise CEOPI fml VM, ifml VM |
| 10. CEO perceives differences in managing between volunteer and employee (same, different) | Promise CEOPI smlr btw volunt n empl, dif btw volunt n empl |
| **VC perception influence** | **Promise VCPI** |
| 11. On communication approach | Promise VCPI on com |
| 12. On interpretation of VM policies | Promise VCPI on VM policy int |
| 13. On understanding TSO needs for volunteer | Promise VCPI on TSO volunt needs |
| 14. On approaches of implementing VM practices | Promise VCPI on VM implemt |
| 15. On value of volunteer contribution to TSO | Promise VCPI on Volunt contri |
| 16. Interpretation of TSO promises to volunteers | Promise VCPI on TSO prom int |
| 17. Interpretation of TSO expected commitment to volunteers | Promise VCPI on TSO expt volunt |
| **Volunteer perception influence** | **Promise VPI** |
| 18. Motivation to volunteering in the TSO | Promise VPI mot |
| 19. Expectation of VM establishment | Promise VPI VM est expt |
| 20. Expected personal commitment level | Promise VPI Expt pers commit lvl |
| 21. Reasons for volunteering with the TSO | Promise VPI volunteering reas with the TSO |

| Psychological Contract 'acceptance' by different actors | Acceptance |
|---|---|
| **Contract terms forming influenced by VC** | **Acceptance VCPI** |

| perception as TSO agent | |
|---|---|
| 1. Agreeing on work frequency arrangement (transactional term) | Acceptance VCPI trans work freq |
| 2. Agreeing on volunteering period (transactional term) | Acceptance VCPI trans expt period |
| 3. Arranging details in carrying out work i.e. expenses covering (transactional term) | Acceptance VCPI trans expense claim |
| 4. Disciplinary procedure (transactional term) | Acceptance VCPI trans discip pcd |
| 5. Training arrangement (relational term) | Acceptance VCPI rela train |
| 6. Regular performance review arrangement (relational term) | Acceptance VCPI rela reg perf rev |
| 7. Boundary policy (relational term) | Acceptance VCPI rela boundary |
| 8. Health and safety policy protecting both volunteer and client (transactional term) | Acceptance VCPI trans HS Policy |
| 9. Means of communication btw volunteer and TSO/VC (relational term) | Acceptance VCPI rela com means |
| 10. Types of support provided to volunteer in personal development i.e. meeting individual expectation (relational term) | Acceptance VCPI rela pers dev sup |
| **Contract terms accepting influenced by volunteer perception** | **Acceptance VPI** |
| 11. Agreeing on work frequency to suit individual availability (transactional term) | Acceptance VPI trans work freq |
| 12. Accepting volunteering period required by TSO (transactional term) | Acceptance VPI trans volunt period |
| 13. Understanding details of undertaking work i.e. covering expenses (transactional term) | Acceptance VPI trans volunt resp |
| 14. Accepting volunteer disciplinary action if applicable (transactional term) | Acceptance VPI trans volunt disci |
| 15. Accepting training arrangement (relational term) | Acceptance VPI rela train |
| 16. Accepting regular performance review carrying out (relational term) | Acceptance VPI rela reg perf rev |
| 17. Understanding Boundary policy in place (relational term) | Acceptance VPI rela boundary |
| 18. Understanding Health and Safety policy protecting both volunteer and client (transactional term) | Acceptance VPI trans HS Policy |
| 19. Accepting means of communication provided (relational term) | Acceptance VPI rela com means |
| 20. Understanding TSO offers support to meet personal expectation and development needs (relational term) | Acceptance VPI rela pers dev sup |
| | |

| Psychological Contract 'reliance' by different actors | Reliance |
|---|---|
| **Factors influencing CEO action to contract fulfilment (by TSO and perception)** | **Reliance TSO** <br> **Reliance CEOPI** |
| 1. Recognising contract fulfilment (volunteer contribution recognition) following TSO 'tradition' | Reliance TSO recog volunt |
| 2. Recognising contract fulfilment influenced by perception | Reliance CEOPI recog volunt |
| 3. Regular reviewing VM policies upon feedback (TSO tradition) | Reliance TSO VM rev |
| 4. VM policies review by perception | Reliance CEOPI VM rev |
| 5. Support to VC work by providing necessary resources i.e. financial and human resources | Reliance CEOPI RB suppt VC |
| 6. Acknowledging volunteer contributing to TSO strategic development | Reliance CEOPI strat volunt contri |
| 7. Facilitating open communication between executive board and VC/volunteer | Reliance CEOPI open commu |
| **Factors influencing VC implementing VM** | **Reliance VCPI** |
| 8. Consistency in communication | Reliance VCPI consist commu |
| 9. Consistency in respecting and recognising volunteer work | Reliance VCPI consist recog volunt |
| 10. Formal support to volunteer carrying out work | Reliance VCPI fml suppt volunt |
| 11. Informal (emotional) support in engaging volunteers | Reliance VCPI emo suppt volunt |
| 12. Consistency in implementing VM practices | Reliance VCPI consist VM implmt |
| 13. Consistency in performance review (relational term fulfilment) | Reliance VCPI rela consist PR |
| 14. Consistency in contract terms fulfilment i.e. promptly dealing expenses claim (transactional term fulfilment) | Reliance VCPI trans consist expense claim |
| 15. Consistency ensuring volunteer expectation met (manage personal development needs) | Reliance VCPI consist meet volunt expet |
| 16. Exceeding volunteer expectation | Reliance VCPI excd volunt expet |
| 17. Highly engaged in supporting volunteer development | Reliance VCPI suppt volunt dev |
| 18. Open to volunteer suggestions to improve VM | Reliance VCPI open volunt suggest VM improve |
| 19. Promoting sense of volunteering community i.e. through regular social events and gathering | Reliance VCPI volunt community facility |
| **Factors influencing volunteer contract fulfilment** | **Reliance VPI** |
| 20. Ensuring consistent responding through communication | Reliance VPI consist commu |
| 21. Satisfied with outcome of VC implementing VM | Reliance VPI satisfied VM |

| | implemt |
|---|---|
| 22. Furthered understanding of needs of VM policies | Reliance VPI understand VM needs |
| 23. Satisfied with level of support from VC | Reliance VPI satisfied VC suppt |
| 24. Preferred VC formal approach to VM implementing | Reliance VPI pref fml VM approach |
| 25. Preferred VC informal approach to VM implementing | Reliance VPI pref ifml VM approach |
| 26. VC emotional support shaped expectation | Reliance VPI VC emo suppt shped expet |
| 27. VC support helped to meet personal development needs | Reliance VPI VC suppt meet per dev needs |
| 28. Satisfied with level of recognition from TSO | Reliance VPI satisfied work recog lvl |
| 29. Preferred to be involved in TSO development | Reliance VPI pref TSO dev invlv |
| 30. Preferred to take initiative | Reliance VPI pref take initiative |
| 31. Preferred to be guided constantly in carrying out work | Reliance VPI pref guided to work |
| 32. VM establishment increased personal commitment level | Reliance VPI VM incre pers commt lvl |
| 33. VM establishment made little influence on volunteering commitment level | Reliance VPI VM no influ pers commt lvl |
| 34. Relationship with VC influenced volunteering commitment level to TSO | Reliance VPI relat with VC influ volunt commit lvl |
| 35. Relationship with VC had little influence to volunteering commitment with the TSO | Reliance VPI relat with VC no influ volunt commit lvl |
| 36. Volunteer social events gave a sense of belonging (happy) | Reliance VPI soc evnt give sens belonging |
| 37. Volunteer social events are not necessary (indifferent) | Reliance VPI soc evnt no necess |

| Influence of Personal Experience on volunteering | PEI |
|---|---|
| **Previous professional background – influencing volunteering; not influencing volunteering** | **PEI/PBIV** **PEI/PBNIV** |
| Previous work in builder agency – maintenance and support | Pre Work Irreverent |
| Change in work influenced volunteering decision | Work chan infl decision |
| Decision for volunteering was made after failed attempt of job seeking | unemployed led to volunteering |
| Individual wanted to do this type of volunteering work | Wanted volunteering work |

**Appendix 15 Summaries of themes from interviewing the office of VCE**

1. Selective in volunteer recruitment – not all people can volunteer

2. Complex organisational objectives
        a. Diverse organisational objectives
        b. Different understandings of what is seen as 'success' to TSO
        c. Fulfilling funder's requirement which often vary to different extend
        d. Various reasons to start an organisation and perceptions of people value
        e. Diverse considerations to sustain the organisational development

3. TSO managers lack suitable management skills to retain volunteers; resistant to change even though the change is necessary

4. TSO managers' lack 'true' understanding of volunteer's contribution and of the importance of volunteer management practices

5. Fragmented/unbalanced volunteer management structure across TSO

6. Importance of understanding that volunteer's motivation/expectation is diverse

7. Importance of managing relationship with volunteers and meet each other's expectations reciprocally; recommending to apply Psychological Contract Theory to understanding the influence of good relationship

8. The importance of setting the *boundary* between personal and organisational life due to the nature of volunteerism – debate of professionalising volunteer management emerges

9. Important to recognise the difference between managing paid employees and managing volunteers, the latter is perceived more challenging

10. Challenges faced by TSOs for dealing with conflict between maintaining their objectives/values and fulfilling funders' expectations to ensure financial assistance

11. Majority of TSOs need volunteers, the workforce contributes to large extend to the organisational sustained development regardless the size of TSO

12. Be proactive rather than re-active towards volunteer issues, i.e. volunteer management risk assessment to establish a sustained structure; needs analysis to adapt 'best practices' of managing volunteers

13. Flexibility in approaches of managing volunteer, sufficient funding to recruit a paid volunteer coordinator is not the only way

14. Volunteer does not have zero cost; it involves seen and unseen cost. The less volunteer management skills the managers possess, the higher the cost

**Appendix 16 the profile of the student-run TSO (not selected)**

**About volunteer involvement:** There are approx. 35 students volunteers who regularly work with the organisation, while approx. 150 on mailing lists who would contribute ad hoc. The mission/values/organisational objectives are achieved/realised purely by student volunteers. The active period is the academic year giving the nature of university life. The organisation is independent organisation although majority of funding comes from University of Edinburgh; any students from any universities in Edinburgh area could join the organisation either on regular or ad hoc basis. The University has singed the funding agreement to provide financial support for 5 years, where it is the 2nd year.

Volunteers initiate fundraising projects with the support of the coordinator and the organisation (i.e. equipment), while each 'project team' is responsible for managing a small budget to deliver the tasks and expected to meet the fundraising target each year. Where the target is not met, there is usually review with the organisation to assess the efficiency and reasons. The coordinator does not get direct involve in any event organising but support; who acts as a 'bridge' between the trustees and volunteers as well as prospective clients sometimes.

In looking for clients, it is mainly the task of volunteers. The coordinator assesses the feasibility of organising fundraising events. The coordinator screens out the unlikely ones and passes onto the possible ones to volunteers. Volunteers are autonomous in planning and implementing any ideas and even responsible for recruiting volunteers for the project. Teams are not formed on single project base, but on regular base.

The coordinator, who has been with the organisation for more than 3 and half years, was recruited by trustees. The organisation has existed in various forms since 1967. The organisation has no immediate concern regarding the funding; and they are able to self-generate funds to support the organisation.

**Key information which might be useful as part of data**: The organisation is much more flexible in structures comparing to the other approached organisations. The communication channel seems to be more direct between trustees and operation volunteers with a regular pattern. Operation volunteers are able to contact trustees directly sometimes, while other times the coordinator acts as the 'middle man'. The volunteer team has been proved to be effective in delivering results in the last 3 years. There is little requirement for the coordinator to directly manage volunteers, most of which work is carried out by 'regular team members' who carries out different tasks covering management functions. Each team is responsible to report to the trustees over their work and achievement at the board meeting. Trustees are strategic planners, overlooking the direction where the organisation should go and set up annual target (the amount of money should be raised during the period) while the coordinator is responsible to provide feedback on the ideas (feasible or not based on practicality i.e. available funds, available volunteers and possibly available skills). Some trustees started to get involved in the organisation from ad hoc volunteering to regular volunteering until becoming trustees after graduate.