

Identifying effective strategies for developing leadership and management skills in volunteer volunteer managers

Item Type	Thesis or dissertation
Authors	Adams, Nicky
Citation	Adams, N.J. (2024) Identifying effective strategies for developing leadership and management skills in volunteer volunteer managers. University of Wolverhampton. http://hdl.handle.net/2436/625827
Publisher	University of Wolverhampton
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Download date	2025-05-12 12:23:26
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Link to Item	http://hdl.handle.net/2436/625827

Identifying Effective Strategies for Developing Leadership and Management Skills in Volunteer Volunteer Managers

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A thesis submitted in partial fulfilment of the requirements of the University of Wolverhampton for the Degree of Doctor of Philosophy

September 2024

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Abstract

This thesis investigates how organisations support volunteers to develop the skills of those volunteers who lead and/or manage other volunteers, or volunteer volunteer managers (VVMs). There is little research into volunteer management/leadership (Posner, 2015) and most research is based on the premise that paid staff manage volunteers. There even less research into leadership and management development (LMD) within the sector (Alizadeh *et al*, 2021). This research considers best practice in LMD outside the voluntary sector and what might be appropriate for VVM development.

The following research questions were identified to investigate these gaps:

1. How are the terms “Leadership and Management” and “Leadership and Management Development” interpreted in the voluntary sector?
2. What leadership and management roles are volunteers undertaking, and what skills are needed to fulfil these roles?
3. How are leadership and management development skills developed in volunteers and how effective are these approaches?
4. How could these approaches be changed or improved to develop volunteers’ leadership and management skills and skill development?

The research was conducted with 16 participants from nine different organisations, all of whom had or currently held a VVM role. The literature review helped construct the interview questions; informal conversations with other stakeholders also took place.

Key findings support the lack of research in the sector and identify that whilst VVMs understand leadership and management, organisational clarity is lacking. This and missing role documentation exacerbates a lack of role clarity. Provision of LMD for VVMs was mixed, as was the quality. An implicit expectation that leadership/management skills are brought from outside volunteering is evident.

The thesis concludes by discussing implications for practice and theory outlined by the study. VVMs need role documentation, support identifying learning needs and provision of appropriate, timely LMD. Recognition of the emotional labour in managing volunteers would be beneficial.

Key Words: Volunteers; Leadership; Management; Learning & Development; Leadership & Management Development

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Acknowledgements

Undertaking a PhD requires a team of willing folk and the following people have been a big part of the team supporting me through this process.

Firstly, thank you to my husband Andy for supplying tea and biscuits and doing a lot of the heavy lifting in other areas of our home life whilst I worked on this. You are my rock. My beautiful daughter Beth has been my loudest cheerleader throughout the process; your confidence in me has kept me going when it got tough, thank you too.

To Dr Jan Firth and Dr Steve lafrati, I would like to say that a good supervisory team is critical – and you weren't good, you were amazing! Thank you both for your support, guidance, kind words, encouragement and lots of laughs along the way.

The cold water is the place I leave all the worries, frustrations and problems and my outdoor swim buddies, the Severn Mermaids – Alison, Gill and Claire - have been there to listen, encourage and support along the way. Thanks for your constant support through it all.

Thank you to so many colleagues and friends for their support and encouragement; particularly to Dr Jenni Jones and Dr Eun Sun Godwin whose mentoring in this last year has really helped me feel more like a real researcher!

A huge thank you to everyone who agreed to participate as an interviewee, or to have an informal conversation with me. Without you none of this would have happened, so your time and input has been invaluable.

Thank you to everyone who has chatted to me about my research (or had it foisted upon them). Everyone conversation has made me reflect and consider different perspectives and develop the bigger picture which resulted in these thoughts and findings. Your contribution is greatly appreciated.

Particular thanks to Claire for the proofreading.

A final thanks goes to Gomez, the kitty, who has been my constant writing companion...even though he mostly slept on the job!

Dedication

I would like to dedicate this to all my fellow Samaritans volunteers and to those who take on additional roles, especially leadership roles.

Thank you for all your service to our callers and our fellow volunteers.

Chapter 1 - Introduction

The purpose of this chapter is to outline why the topic of developing leadership and management skills in volunteers who lead and manage other volunteers is worthy of research. This will include views from those who lead and manage volunteers whether paid or unpaid, senior leaders in the voluntary sector and a summary of the literature related to the topics of leadership, management and leadership and management development (LMD). The contribution this research will make, and the methodology used will be briefly summarised; the research objectives will be stated and the structure of the remainder of the thesis outlined.

1.1 Personal Introduction

This research is personally important to me as a volunteer and an academic.

I have always worked in roles that involve dealing with people; customer-service roles, management roles, training consultant, lecturer, course leader, personal tutor and been interested in others. I moved from customer service management to training consultancy when I was made redundant and from there my career moved into Further and then Higher Education, always working with adults. I have trained, taught and lectured in customer service, HR, L&D and leadership and management for nearly 25 years and helping others learn and grow still gives me the same buzz it did when I first started. Poor leadership is one of the most damaging things in organisations, good leadership can have a transformative impact on those who experience it, and HR and L&D influence how leadership is delivered in organisations. The importance of getting leadership and management right cannot be understated in my view.

When the opportunity arose to undertake a PhD, my initial thoughts were to do something related to learning and development or leadership but I also wanted to research something related to volunteering, to pay back some of the personal benefits I have gained, and still continue to gain, from my time as a volunteer with Samaritans.

I have been a Samaritans listening volunteer for 30 years in 2024 and in that time I have held a range of roles with varying levels of leadership and management. Most

recently I was Branch Director at my local branch in the West Midlands, a three-year voluntary post from December 2020 to December 2023. You are offered the role at the request of the branch, who nominate you, so it is a significant privilege but also one which comes with a demanding workload of both leadership and management priorities. The branch and associated charity shop had in total about 80 volunteers (60 listening volunteers, 20 shop volunteers) with shop turnover of £36k p.a. and branch running costs of £45k. Overseeing this, even with a committed team, is a considerable commitment. Prior to this I had held a range of learning and development and quality officer roles at branch and regional level and had also held an organisation-wide strategic learning and development role. These were all undertaken as a volunteer and in addition to my regular listening volunteer shifts in my branch.

Although I started volunteering for altruistic reasons, to be there for others, over the years my volunteering has brought many unanticipated and unsought personal benefits. I have met people I would never have come into contact with outside of my volunteering. I have learnt a range of life skills which have supported me through challenging personal times and also helped me in my career. I have received some excellent training and development and been encouraged to try new things such as delivering training and public speaking. I have been supported through difficult times by the branch leadership and friends within the branch and wider organisation and been able to provide support to my fellow volunteers when they have needed it. Helping out a fellow volunteer with some training led me to discover that I love helping others learn and develop and prompted a change of career when I was made redundant. The skills I learnt mean I am able to support distressed students and colleagues in my paid work and also share these skills with them. Being a Samaritans volunteer has literally shaped me as a human being and has given me a career I love. And I am still as passionate about Samaritans' vision that fewer people die by suicide and the service we offer today as I was when I applied to volunteer over 30 years ago.

I want my research to give something back to Samaritans and sector that has provided me with skills that have made such a difference to me, my family, my professional life and hopefully to at least some of the many callers I have had contact with. At the start of this research process, the idea was no more formed than

that. A range of conversations with friends and colleagues helped me to realise that, whereas Samaritans training to deliver the service is second to none, training to support volunteers into director, deputy director, regional and organisational roles – senior volunteering roles - in Samaritans was poor overall. For some roles there was generic and inconsistent training. For others there was no role-specific training at all. It was at this point I realised that there seemed to be an expectation that you already knew how to do the role so you were given an outline of what the role was all about and then left to it with support from a buddy or similar if you were lucky. This explained why the experiences I had been through, and seen, of being led and managed by other volunteers, had been so varied in quality. Organisationally we know from volunteer surveys that poor leadership at branch level can impact volunteer turnover and at a local level I have seen this happen.

My knowledge as a lecturer in HR and Leadership, as well as experience of being led and managed in several workplaces meant I knew this was the same in paid employment. Whereas here the pay was a significant motivator, volunteers just walk with no notice if they do not like what they see. These realisations and conversations helped form the idea to research how we find volunteers to do leadership and management roles, if they bring the skills for the role with them or if they acquire them, and if so how. And finally, how we could do this better – so that ultimately we can utilise volunteer time and expertise more effectively, retain more volunteers and provide a better service to those who benefit from our services – be that at Samaritans or any other voluntary organisation.

Finding huge gaps in the research into volunteer leadership/management is both a boon and a curse. The frustration of not being able to find information to support one's work is huge. Data about leadership roles undertaken by volunteers is rarely gathered internally, let alone shared externally. The size and variation in the sector means that data is often too generic to be meaningful. On the other hand the opportunity to contribute to knowledge is also a huge responsibility and privilege. The contribution to knowledge from this thesis is important academically, but personally the contribution to practice and the opportunity to share how to do this better with voluntary organisations, to improve the experience of volunteers and service users alike is the more important element.

1.2 Importance of the Research

1.2.1 The Voluntary Sector

The voluntary sector is a significant contributor to GDP (gross domestic product) in the UK with estimates varying from £18.7bn (Armour, 2022) to £324bn (Ricketts, 2023) and percentages between 5% and 14.5%, with professional and managerial volunteering contributing £4.6bn pa (Whitehead, 2024). Regardless of the actual figure, it shows the significant importance of volunteering to the wider economy.

There is also a lack of clarity in terminology used within the sector. The term 'voluntary sector' originally referred to organisations independent of government (Paton, 1992) but changes in policy relating to the voluntary and community sector in the late 1990s (Kendall, 2003) and the Big Society concept of the early 2000s (Davis, 2016; Macmillan, 2013; Brindle, 2015) led to more formalised relationships and an increase in regulation and loss of autonomy. It also refers to both the sector and the organisations in it which are dependent on and/or managed by volunteers, such as trade unions. The term 'charity' is an alternative and could be used but this can also include organisations such as private schools. The terms non-profit and not-for-profit are used in some literature, with Anheier (2014) using the term non-profit to cover religious and secular organisations, organisations covering all aspects of civil society from education to welfare and focusing on people, animals and the environment. Third sector and civil society also refer to a wide range of organisations doing very different activities and here too there is little consensus on the definition (Tabassum, 2023). This inability to find a common definition and interchangeable use means that a range of terms had to be used when searching the literature to ensure that a breadth of sources were located. These have been kept in this thesis, reflecting the terminology used by the original authors wherever possible. Whilst this might lack consistency, it is indicative of the scale of the challenge of researching in this field. Equally, different charities use different terminology when talking about their volunteer roles; many use language specific to their purpose, e.g. RNLI use sailing terminology like coxswain, Samaritans refer to Branch Directors whilst some avoid the use of business terminology, so "lead volunteer" is a term often heard by the researcher. This also presents challenges when researching what support may be provided for volunteers undertaking leadership type roles. For this reason a

variety of terms will be used to reflect this diversity, although volunteer volunteer manager (VVM) will be the most commonly used.

As well as varied terminology, the voluntary sector in the UK is also made up of a wide variety of voluntary organisations. Micro- and small organisations made up just over 80% of the voluntary sector organisations in 2020/21 (Tabassum, 2023) although this is down on the 88% in 2000/01. Most of these will have no staff (ReachVolunteering, n.d.) so volunteers set up the charity, deliver the service and lead and manage the charity. This is seen at a local level as well as nationally, with only 45% of charities in one area of the West Midlands having paid staff (Caulfield and Massie, 2019) and three quarters having fewer than five staff in total, reflecting the national picture. This predominance of small organisations with few or no paid staff may go some way to explaining why there is so little research into volunteer volunteer leadership as locating the right people to engage with in such organisations will be difficult.

This model of volunteers delivering the service and providing a high level of leadership/management to other volunteers can also be seen in a small number of the large and very large charities, although the majority deliver their services predominantly using staff with volunteers providing support in the delivery of the service. For example, Samaritans volunteers deliver the service, leading and managing individual branches, there is a regional network of specialist volunteers providing further support and several specialist strategic organisation-wide roles are done by volunteers. Consequently there is a very low ratio of staff to volunteers, currently approximately 1:125 on an income of £19 million. (Charity Commission, 2018). Charities such as Guiding, Scouting and the RNLI are similarly run, with RNLI saying "97% of our frontline lifesavers are volunteers" (RNLI, 2024). This is significantly different from many other large charities and voluntary organisations where volunteers are routinely managed by staff and the ratios are much higher. Charity Commission (2018) figures support this, since charities with a similar income to Samaritans such as Teenage Cancer Trust (£16 million) or higher income but involved in similar support such as Mind (£41 million) have ratios of 1:4 or 1:5 respectively. It would seem that there are a significant number of organisations potentially with large numbers of volunteers in leadership type roles.

Volunteer management brings with it a range of challenges according to Anheier (2014) since leadership usually implies a level of power and authority which is likely to have less impact on volunteers. Smith, Callaghan and Fellin (2020) note the challenges in leading and managing intrinsically motivated volunteers. This leads to the need to find alternative methods of leadership and management, since coercive power will most likely result in the swift exit of volunteers. To support this, Dartington (1992) comments that good management in the sector uses moral authority and influence, taking a more relational approach to volunteer management, an approach offered as a more appropriate style in the voluntary sector (Terry, Rees and Jacklin-Jarvis, 2020). There is therefore evidence of research into volunteer leadership and management however it is almost exclusively researching paid staff at middle, senior or executive level or volunteers at Trustee Board level. The volunteers who are the focus of this research are those performing a role at a middle management level equivalent, and who have both management and leadership responsibility and do not seem to appear in sector research. Given that Samaritans has over 15,000 volunteers (Samaritans, 2024), RNLI has nearly 10,000 (RNLI, 2024), Girlguiding has 70,000 (Girlguiding, 2024) and Scouting had over 140,000 in 2021 (Weakley, 2021) and that a proportion of these will be in leadership/management positions, this is clearly a significant gap and one highlighted by Posner (2015). Little appears to have changed in the intervening nine years. It would appear that very few organisations keep data on volunteers in leadership/management positions however so accurate numbers are not available.

1.2.2 Leadership and Management

Most of the research into leadership and management is business-based and there is comparatively little research within the voluntary sector (Terry, Rees and Jacklin-Jarvis, 2020). There is also a difference between the approaches taken, with the voluntary sector identifying collaborative and relational approaches as most appropriate in the sector and with volunteers (Ivanovska Hadjievaska, Johansson and Altermark, 2023; Lyndsey, 2023). Bratton (2023a and 2023b) notes these approaches were popular in the 1990s in business but have since been replaced by more leader-centric approaches.

As noted in the literature, there is no agreed definition for leadership (Harrison, 2017; Terry, Rees and Jacklin-Jarvis, 2020) and it can mean different things in different environments, relating to things as varied as how we lead, management tasks and governance (Plummer, 2019, citing Rees). This view is reflected more widely in the literature, with older research focused on management in the sector, and more recent on leadership. Although there is broad agreement in the literature that management is about control and process and leadership about influencing others, this distinction is not always made in research with the terms often being used interchangeably which would seem to reflect Mintzberg's view that the two are complementary (Buchanan and Huczynski, 2019). Additionally the word manager is more often evident in job titles than the word leader even when both are required (Bezboruah, 2011). This move is reflected in both business and voluntary sector research, demonstrating that there are connections and commonalities in both sectors. For these reasons this thesis also uses the terms interchangeably apart from when they are being discussed as defined academic concepts.

Conversations relating to leadership and management and the development of these skills can be seen as controversial by some within the sector. There has been an inexorable professionalisation of aspects of the sector over the years, for example services moving from public sector to voluntary sector organisations and the associated expectations of measuring their success and contribution has driven changes, one example being in commissioning for projects (Ellis Paine and Macmillan, 2019). However there are also areas where this is less clear cut. On the one hand, voluntary organisation CEOs may avoid the use of leadership terminology (Jäger, Kreutzer and Beyes, 2009) and volunteer training and leadership is informal in its delivery (Fullwood and Rowley, 2021). On the other hand, there can be expectations that professional management processes (De Clerck *et al*, 2021) and HR processes for managing volunteers (Nesbit *et al*, 2016) are implemented. In spite of this, there is limited evidence of consistent professional development across the sector (Alizadeh *et al*, 2021). Where professional development is present, it is often for CEO level (Mumbi and Obembe, 2022). This professionalisation could be seen as a move away from the intrinsic, emotional motivation of volunteering (Khan, 2020) and whilst this may be necessary for funding and commissioning purposes, it can often be a barrier for volunteers, for whom volunteering may be a conscious

decision to do something different from their professional lives. Since volunteers are present for these intrinsic motivators rather than extrinsic motivators such as pay, there is a risk that increased professionalisation might further reduce volunteer numbers and those willing to take on senior volunteering roles.

For VVMs then, their approach to leading and managing needs to balance any wider organisational need for a more professional approach with their and their volunteers' motivation for volunteering. As there is very little research into VVMs/leaders at this level, this thesis presents an opportunity to explore what these post holders think of their roles and how they acquire the skills to do the role, rather than assuming there is a shortfall in leadership skills as is often the case in voluntary sector leadership research (Terry, Rees and Jacklin-Jarvis, 2020).

1.2.3 Leadership and Management Development

If the research into leadership and management in the voluntary sector, particularly for volunteers in leadership/management positions, is limited, then the research into how leadership and management skills are developed is even more scarce and is one of the most under-researched and least understood areas of volunteering (Alizadeh *et al*, 2021), further supporting the need for this research. More broadly, the interchangeable use of leadership and management is reflected in the conflation of management development with leadership development, and the disagreement on whether they are different (McGuire, 2014) or simply mean different things to different people (Claxton and Gold, 2013; Buchanan and Huczynski, 2019). There is a view that leadership and management development (LMD) can be used as a differentiator (Iszatt-White and Saunders, 2017) and should be related to the organisational context (McGuire, 2014) enabling the terms to be defined (Page-Tickell, 2017) and the development of appropriate interventions. This would suggest that differentiated, personalised LMD is required in all contexts, whether for- or non-profit.

The difference between leaders – individuals – and leadership – a wider organisational concept – is highlighted in both the non- and for-profit literature along with the recognition that leadership does not solely exist in positions of authority

(Jacklin-Jarvis *et al*, 2022; Watt, Boak and Gold, 2023) and both leaders and leadership should be developed.

Identifying what skills should be developed is sometimes linked to specific leadership theories (Barends *et al*, 2023); as a relational style is recommended for the voluntary sector, this would need socio-emotional skills, yet considerations such as emotional labour in leadership are rarely discussed (Humphrey, Pollack and Hawver, 2008). This is significant since research into volunteer management (Greene and Ward, 2016) shows a much higher level of emotional labour is required. Another area discussed in the non-profit literature is the number of skills required to be a manager/leader and how it is unlikely that these would be found in one individual, making shared/distributed leadership an ideal approach (Kapoor, Noida and Agnihotri, 2015; Goksoy, 2016). In spite of this, there is evidence that a more professional, hierarchical management and leadership approach to volunteer LMD is the reality – in those limited areas where volunteer LMD takes place. The criticisms present in the literature of LMD programmes e.g. they are too formalised and lack opportunities for unplanned or informal learning (Stewart, 2009) could be seen to demonstrate that they are not suitable for volunteer LMD as informal learning (Fullwood and Rowley, 2021) and self-directed learning (Palanski, Hammond and Khazanchi, 2022) are significant elements of volunteer learning.

Much of the LMD available to volunteers is concerned with processes related to HR activities such as recruitment rather than about how to lead and manage volunteers effectively (Safrit and Schmiesing, 2012) and again focused on staff managers, not volunteers. This reinforces the potential for professionalisation of volunteering. Although approaches used in business LMD can also be effective for VVMs, with experiential learning being considered particularly effective in allowing connections to be made between learning and practical application (Iszatt-White and Saunders, 2017), due to the lack of research it is unclear how well or frequently these are used. There is comparatively little focus on the processes to ensure that LMD is effective and learning needs identification/analysis and evaluation are barely mentioned although Bosley and Gifford (2023) amongst others note its importance in the wider literature.

Given the considerable contribution volunteering makes to the economy and wider societal life, research into these areas is overdue.

1.2.4 Methodology

Identifying the correct research paradigm is critical to provide robust, effective research. The tendency has been to use positivist methodologies in leadership/management research (Dudovskiy, 2019) and HR research (Hesketh and Fleetwood, 2006) which is more likely to lead to quantitative research which also been prevalent in the voluntary sector (Scott and Russell, 2005; Hardwick, Anderson, Cooper, 2015). It would have therefore been relatively easy to support a positivist, quantitative methodology for this work. Instead a subjectivist paradigm using critical realism and qualitative methods will be used for this thesis.

There are a number of reasons why this paradigm and methodology is best suited for this research. The work seeks to understand the different elements of volunteering using the richness of personal experiences supporting a qualitative approach (Hogg, 2016) as well as reflecting that volunteering is part of wider life experiences. A critical realist approach within leadership learning research also helps us understand the “how” of this (Kempster, 2006) which is a main element of this research. The importance of individual experience, the impact of a range of external factors on this and the perceptions and beliefs which follow from this are fundamental to a critical realism paradigm (Bryman and Bell, 2015). Additionally this approach allows the researcher to acknowledge the influence they and their beliefs may have on the research (Gray, 2014) which given the researcher’s position as a volunteer and experience as a VVM, is important for this research. This links to the consideration of axiology and the impact of the researcher’s values on the research (Dudovskiy, 2019).

Sampling of the participants and ethical considerations are explored in relation to the study, supporting the robustness of the research. When undertaking qualitative research, the researcher is seeking credibility, transferability, dependability and confirmability rather than the generalisability, validity and reliability which is associated with a realist perspective (Lincoln and Guba, 1994). These are more suited to the depth and nuances of this qualitative research.

1.2.5 Participants

Identifying participants and their organisations is outlined in detail in the methodology chapter, and at proposal stage the aim was to carry out the research with three large voluntary organisations whose volunteers deliver the service and staff provide support for the charities' work. Membership of the Association of Volunteer Managers and the researcher's own volunteering with Samaritans meant that relationships had been formed through active networking. When Covid-19 arrived, the impact was significant with contacts at the organisations having to focus on service-related issues. By the time lockdowns eased, all the contacts had moved on, often through pandemic-related restructuring. Given that it had taken around 18 months to build these relationships, the researcher decided to use Samaritans and a selection of volunteers from a wide range of different voluntary organisations instead of starting again with some of the organisations, who were now less willing to commit the time needed to the research. Details of these and the challenges in finding participants are discussed in the chapter. Whilst this was a disappointing setback, the use of a range of organisations different sizes and types will bring a wider variation to the results, supporting a more transferable set of recommendations which it is hoped will provide benefits for voluntary organisations of different types and sizes.

1.2.6 Data Analysis

Identifying the best way to analyse data is a critical part of good research and there are a range of frameworks that can be used as well as software to help do this. A thematic analysis will be used here, since the interview questions are based on those areas highlighted in the literature as important in relation to the research topics, as well as areas which are under-researched or absent from the literature. The researcher's own experience in paid and voluntary leadership/management roles also shaped some of the areas for investigation, as did early conversations with target organisations. Thematic analysis supports a critical realist paradigm (Braun and Clarke, 2006) and enables important themes to be explored in under-researched areas. The analysis can either be conducted using software or manually and the choice made will be justified in the methodology chapter. As a precursor for

identifying potential organisations and individual participants, the researcher joined the Association of Volunteer Managers and used her existing business and volunteering networks to build new relationships. These will be used to gain insight into current issues for volunteer and paid volunteer managers across the sector and this will add a further dimension to the output from the formal interviews, providing a richer picture of leadership/management and their skill development in the sector.

1.2.7 Recommendations

The recommendations will be drawn from the analysis and provide guidance for voluntary organisations in good practice for developing leadership/management skills in volunteers who are interested in, or already hold, volunteer leadership/management roles. Ideally it will also provide sufficient information for a checklist of actions and activities for voluntary organisations to consider when appointing VVMs, although these may also be relevant for paid volunteer managers.

1.3 Contribution to Knowledge and Practice

Given the lack of research into volunteer leadership/management (Posner, 2015) and the development of these skills (Alizadeh *et al*, 2021), this research presents a number of opportunities to contribute both knowledge and practical application as well as methodologically.

- Creating the proposal for this thesis evidenced that little has changed since Posner's 2015 view. It will therefore confirm the dearth of research into volunteer leadership/management and also for the development of these skills.
- It aims to build on the work that is already being done into volunteer leadership/management and the most appropriate and effective styles for the voluntary sector.
- Understanding what leading/managing volunteers is like when you are a volunteer yourself, how the skills to undertake the role are currently acquired and how this skill development could be improved will all be new knowledge as this is not area that has been researched.

- Empirical research and the literature review will identify if business-based approaches to leadership/management development are used in the voluntary sector and evaluate the efficacy of what is used. This knowledge itself will build on what is already known about this and may add new knowledge.
- New knowledge will be gained from engaging with volunteers who undertake these activities.
- Leadership/management is often framed in terms of control, division and influence and with a focus on financial aspects. These are often not effective or not evident in a volunteer relationship, so considering them in this context will add to our knowledge of leadership/management in a more relational way.
- This work crosses the disciplines of business and sociological research. It is almost impossible to find reference to voluntary organisations or the voluntary sector in standard texts on leadership and management. Volunteer-related research is often founded in sociological research and focuses on issues such as motivation and retention. Considering both volunteers and leadership/management and focusing on volunteers not staff provides a unique perspective here.
- This research will take a critical realist perspective. As noted above, the majority of research into leadership, management, HR practices and volunteering is quantitative in nature. Quantitative research assumes that things can be measured and quantified and reliability is important. Critical realism acknowledges that there is an alternative to quantifying relationships, experiences and motivators that allows the breadth and richness to be explored. This is uncommon in voluntary sector research.
- Research into volunteer management is based almost exclusively on paid staff as managers, researching volunteers as managers/leaders contributes a new and different understanding to volunteer management and leadership at a middle-management equivalent level.
- Sharing the findings and outcomes from the research with contacts in the voluntary sector and within Samaritans will be a practical application of the learning.

To achieve these contributions, the following research objectives will be the focus of this thesis.

1.4 Research Objectives

- Interrogate key literature around leadership and management (LM) theories and approaches, and leadership and management development (LMD).
- Identify and analyse the relevance and application of these to the voluntary sector,
- Understand the range of LM roles open to volunteers and establish what LMD opportunities are provided to support skill development in these roles
- Identify whether the opportunities provided meet the needs of volunteers in LM roles, from a theoretical and practical perspective
- Make recommendations regarding good practice in existing LMD approaches, and also possible changes which could benefit volunteers, voluntary organisations and the wider sector in relation to developing LM skills.

In order to achieve the above objectives, the following research questions will be addressed.

1.5 Research Questions

1. How are the terms “Leadership and Management” and “Leadership and Management Development” interpreted in the voluntary sector?
2. What leadership and management roles are volunteers undertaking, and what skills are needed to fulfil these roles?
3. How are leadership and management development skills developed in volunteers and how effective are these approaches?
4. How could these approaches be changed or improved to develop volunteers’ leadership and management skills and skill development?

1.6 Following Chapters

The next chapter (chapter 2) will provide an overview of the voluntary sector, highlighting different terminologies used in the sector; it will consider the size and value of the sector; discuss professionalisation and the type and style of management and leadership approaches for both staff and volunteers. It will also identify where there are gaps in the current research. Chapter 3, the literature

review will consider literature from the for- and not-for-profit sectors relating to leadership and management as well as literature relating to the development of leadership and management skills. The methodology is outlined in chapter 4, identifying the ontological and epistemological foundations used in the thesis and stating the research methods used. It also covers information about the participants and the thematic analysis used in the following chapter.

In chapter 5 a full analysis of the data gathered through both formal and informal activities is carried out. Alongside this is a discussion of the findings drawn from this analysis, linked to and supported by the literature. Finally, chapter 6 draws some overall conclusions and where appropriate, makes recommendations regarding improvements to support the development of appropriate leadership and management skills for these volunteer leaders. There is a short section on reflections on the research as a whole.

Buckle up and enjoy the read!

Chapter 2 - Voluntary Sector Overview

This chapter will provide an overview of the voluntary sector and the different forms organisations can take. From this, the discussion will move onto considering the structure of organisations and how this influences culture, approaches to leadership and management and the development of leadership and management.

2.1 Defining the Sector

The voluntary sector is described and defined in a number of ways. Paton (1992) states the origins of the term 'voluntary sector' refer to organisations which are independent of the government, but this relationship has changed over time. Additionally, the term 'voluntary' refers to organisations which includes organisations both dependent on and managed by volunteers as well as the sector itself, which then includes organisations such as trades unions which may not fit the general view of a voluntary organisation. The term 'charity' is equally fraught as it includes organisations like public schools; the terms non-profit and third sector are also very broad.

The term Civil Society is also used although there is no agreed definition of this (Tabassum, 2023) it broadly refers to a wide range of organisations which serve a variety of purposes, not limited to promoting social change and civic engagement and providing services of benefit to the public. It serves the role of mediator between citizens and the state (*EUR-Lex*, n.d.) and is sometimes referred to as the third sector (Jezard, 2018). Both Jezard (2018) and Tabassum (2023) comment on the evolution of civil society in response to societal changes, one example being hybrid organisations which have elements of more than one sector.

Anheier (2014) claims that an organisation can identify as a non-profit if it meets five criteria relating to a level of organisational structure and form; being separate from the government; having their own governance structures and processes, with authority separate from government or corporation influence; any profits are invested back into the organisation and its key activities; including a significant level of voluntary contribution, both in terms of services being delivered by volunteers and the commitment to this being voluntary i.e. not enforced or required by law.

Therefore he uses the term non-profit to cover the broad range of organisations which fall into this category, identifying religious and secular organisations, organisations covering all aspects of civil society from education to welfare and focusing on people, animals and the environment. Kendall defined them as “organisations which are formal, non-profit distributing, constitutionally independent of the state, self-governing and benefitting from voluntarism.” Kendall (2003, p.6). Handy (1992) makes the distinction between organisations in the sector using categories of mutual support, service delivery and campaigning and notes that although organisations tend to start in one of these sectors, there can often be a move into other categories which can cause confusion and a clash of values. It can be seen that although there is a broad agreement on issues such as independence from government, there is a lack of consensus overall on how to define the sector and what kind of organisations should be included which does not appear to have lessened over time.

This conflation of terms and lack of clarity means that some of the terms are used interchangeably throughout this work however the focus is specifically on organisations which use volunteers to deliver part or all of their service, whatever that might be.

The voluntary sector in the UK has a long history. Davis (2016) identifies the first significant engagement in voluntary activities being undertaken by religious organisations such as the YMCA and Salvation Army. In the early 20th century those involved in business developed organisations such as Lions and Rotary to benefit the wider community. Both of these reflect the altruistic nature of volunteering although it is a sector has a history of varied narratives. He further notes that the latter part of the 20th century saw a move to a more formalised structure for volunteering, a view supported by Brindle (2015) who also relates this to the political and economic situation in the 1980s. Kendall (2003) also discusses the political influence and further comments that lack of consistent funding has negatively impacted on smaller charities to develop people functions, potentially driving the perceived need for a more formalised and professionalised approach. Butler and Watson (1990) broadly agree and also discuss how the services are spread across both the statutory and voluntary sectors which although not always harmonious, can be traced back to 16th century. The sector grew significantly from the 1950s with key

areas being the growth of specialist provision within the sector, increases in coordinating bodies and increased involvement of and funding by local and national government.

The sector is responsible for employing approximately 3% of the UK workforce and although the numbers have fluctuated in recent years, increasing during the pandemic and falling back to closer to pre-pandemic levels by 2023, this headline figure remains stable. Over half of these work for organisations which have fewer than 50 employees again with some minor year on year fluctuations (NCVO, 2021; NCVO, 2022; Tabassum, 2023). The number of voluntary organisations in the UK has also shown a similar fluctuation, with the 2018/19 figure standing at 163,150 (NCVO, 2021), rising to 165,758 in 2019/20 (NCVO, 2022) and falling to 163,959 in 2020/21 (Tabassum, 2023). Most of these are micro and small organisations; micro-organisations have increased whilst the small and medium organisations have declined. Small organisations are increasingly dependent on public funding whilst about 80% of the sector income is attributed to organisations with an income of over £1m pa.

2.2 Role of Voluntary Organisations

As early as 2008 Carmel and Harlock noted the increase in charities' involvement in providing services alongside public service organisations. The voluntary sector has increased in size and scope and social changes mean that charities are more involved in activities which traditionally would have been undertaken by public sector organisations (Butler, 2017). Historically the voluntary sector was involved in those areas not covered by public services, however this has changed in recent years with the sector taking on greater and greater responsibilities. In spite of assertions that the voluntary sector in Britain is unique, at the end of the twentieth century it was found to be smaller in terms of both volunteers and financial size (Kendall, 2003) than in other parts of the world. He charts the development of the sector in the 1990s following the Labour Party's decision to partner with the voluntary sector to deliver its social agenda. This reflected the relationship between non-profit and government which is both longstanding and common in other European countries. He also notes that the language around such organisations has evolved with the

terms 'third sector', 'voluntary and community sector', 'civil society' and 'voluntary sector' being used in different contexts to mean the same thing. This change in terminology is a reflection of both the rhetoric used and the inclusion of the sector into mainstream policy decisions, and further muddies the water in relation to accurately defining the sector and the activities and relationships for those organisations within in.

The inclusion of the voluntary and community sector in 1998 in UK policy decisions led to the sector to committing to standards of governance and accountability; stakeholder involvement and different approaches to funding (Kendall, 2003). This is further supported by developing concerns in the 1990s relating to the formalising relationships between government and the voluntary sector, increased regulation and an associated loss of autonomy and financial risks where short-term contracts are awarded. As early as 1992 Paton was identifying changes caused by the move of services from public to voluntary sector organisations. Macmillan (2013), Brindle (2015) and Davis (2016) note that the concept of the Big Society as proposed by David Cameron is therefore not new, but that the approach taken to it and expectations of it are substantially different. Slocock (2015) comments that the Big Society was not effective and that it has left the voluntary sector weakened rather than strengthened, a view shared by Butler (2015). There is also an expectation that voluntary sector organisations are able to justify their contribution or measure their success, in itself a complex and problematic process.

This has in many areas led to a drive for professionalization to manage expectations in this changed environment (Davies, 2011; Chum *et al*, 2013). Jäger, Kreutzer and Beyes (2009) noted the lack of use of leadership vocabulary used by CEOs in voluntary organisations and Fullwood and Rowley (2021) observe a more informal approach to volunteer training and leadership, both of which could be linked to avoiding perceived professionalisation. In contrast, there is an expectation that professional management approaches are used within the sector (De Clerck *et al*, 2021) and formal measures are used in voluntary sector CEO development (Mumbi and Obembe, 2022), both of which can be seen to indicate a level of professionalisation (Khan, 2021). The use of HRM practices within voluntary sector organisations as noted by Nesbit *et al* (2016) and Einolf (2018) may also be

connected to wider professionalisation, although it is also argued that overall there is a lack of professional development within the sector (Alizadeh *et al*, 2021).

The need for professionalisation can also be seen in the challenges of commissioning for projects (Ellis Paine and Macmillan, 2019). Commissioning can be complex, requiring a specific skill set, with some organisations employing increasingly large specialist teams to support their commissioning activity whilst others are unsure if the financial and organisational risks involved in some projects make it worthwhile to engage in the process at all. In spite of this, by 2020 over half of charities involved in State of the Sector research by NPC (Hanford-Spira, 2020) had a public sector contract although over half of these were also subsidising these contracts with additional income, and by 2024 nearly two thirds of charities felt they did not receive the full cost of delivering a public sector contract (Clay *et al*, 2024), further supporting Ellis Paine and Macmillan's (2019) findings and Bezboruah's (2011) view that professionalisation is required to meet the same standards as for-profit organisations. Anheier (2014) observed that the sector's economic and social impact was continuing to grow, as many governments and societies question the state's ability to meet increasing social needs, and the evidence already presented here supports that in the intervening years.

It could be argued that this is part of the progression from industrial to post-industrial society and overall demonstrates the increasing importance of the sector within the wider economy although the changes in working practices such as the rise of the gig economy and increased use of food banks during the cost-of-living crisis in the early 2020s may provide an alternative view here. There have been regular attempts to value the sector, with a Cabinet Office and IVR report from 2007 valuing the sector in the UK at an estimated at £38.9bn and a DWP and Cabinet Office report by Fujiwara, Oroyemi and McKinnon (2013) estimating the value at £70 billion or 5% of UK GDP. Cahalane in 2014 reported that 26% of the UK population had volunteered in the previous three months and by 2022 this was cited as 29.7% (Armour, 2022) with the socio-economic value of volunteering to the UK economy at £18.7bn, including donations, this totals £23bn, or 0.8% of GDP. Ricketts (2023) reports the 2023 value as £324bn a year and says this is the equivalent of 14.5% of GDP. Research by Pro Bono Economics and the RVS in 2024 cites the value of professional and managerial volunteering at £4.6bn pa (Whitehead, 2024). Although

the figures are inconsistent, it is nonetheless a significant financial and socio-economic contribution.

2.3 Volunteering and Volunteers

The NCVO (2017) defines volunteering as “any activity that involves spending time, unpaid, doing something that aims to benefit the environment or someone (individuals or groups) other than, or in addition to, close relatives. Central to this definition is the fact that volunteering must be a choice freely made by each individual.” They further identify that this can be both formal and informal and that it provides benefits for the individual. Waikayi *et al* (2012) comment that there are a variety of definitions but some common threads are working for no monetary gain; commitment and willingly giving time, skills or service to an organisation. They assert volunteering is broadly undertaken to meet one of two contrasting motivators i.e. altruism based on concern for the welfare of others and the need for recognition from others. Alternatively the relationship between the donor and the recipient can be a motivator, from either a personal utilitarian perspective where the donor gains benefit, or a personal or non-utilitarian or altruistic perspective, they are offering a “gift” (Anheier, 2014). This does provide a somewhat limited view of giving as a one-off activity rather than the development of a more complex set of relationships, which would be evidenced by the NCVO’s 2017 data showing that over 14 million people volunteered at least once a month. Civic-mindedness, seeing oneself as part of a larger social community, is a significant factor he identifies in relation to volunteering. This is a learnt behaviour from home and education influenced by parental volunteering, engaging in political discussions and civic education at school and is also influenced by socio-economic factors such as education and earnings (Anheier, 2014). Alternative motivators can be to find more of what motivates within a job role, or to experience that which is missing (Rodell, 2013).

Organisations where volunteers are involved span a range from small local charities where everyone involved is a volunteer, to large multinational charities and Third Sector Organisations (TSOs) where volunteers and staff at all levels are involved in delivering a complex set of services. TopNonProfits (2017) provide six broad groupings based on both the area of involvement e.g. animals and the type of

organisation e.g. NGO. Gov.uk (2013) lists 12 areas related to the promotion, prevention or advancement of different areas as well as “any other charitable purpose” directly from the Charities Act 2011. This links to Anheier (2014) and Paton (1992) above, both in terms of organisation activity and the use of volunteers. The UK also has provision for Community Interest Companies (CICs) “limited companies which operate to provide a benefit to the community they serve. The purpose of a CIC is primarily one of community benefit rather than private profit” (Gov.uk, 2024) which combines both a traditional business and charity model. This links to Paton’s (1992, p.5) view of the social economy, defined as “small and medium-sized organizations orientated towards the provision of some kind of common benefit or public good”. Such organizations are most likely to be centred around their focus on a common goal and consequently have a distinguishing values system and can be referred to as “value-based organizations”. This does however assume that such organisations are limited in size and that larger organisations lose sight of these values. Overall this further demonstrates the range and diversity of the sector and a crossover with a business- based approach.

Covid-19 had an impact on volunteering. The researcher’s conversations with volunteer managers revealed that ad hoc volunteering and micro-organisations had increased significantly during the pandemic and whilst formal volunteering with an organisation fell, informal volunteering increased significantly (Speed, Crawford and Rutherford, 2022; NCVO, 2021). In 20/21 in total 16.3m people volunteered in some way (NCVO, 2021). This presented organisations with some significant challenges and consequently not everyone who applied to volunteer was able to do so, although by second lockdown there were higher rates of volunteer matching. The profile of the volunteers was also different to pre-pandemic volunteers, in terms of age and location (Speed, Crawford and Rutherford, 2022). Post-pandemic volunteer numbers returned broadly to pre-pandemic levels, with the number of working age volunteers who had boosted numbers during lockdown falling off and both formal and informal volunteering rates dropping (Tabassum, 2023).

A different picture appeared relating to social demographics, with those from the most deprived areas and people with disabilities participating less. The fall in formal volunteering probably reflected the difficulties in volunteering during lockdown, with informal volunteering filling the gap (Speed, Crawford and Rutherford, 2022). Post-

pandemic it is likely those of working age were no longer able to give as much time, something this researcher has seen first-hand in her own volunteering with Samaritans. In 21/22 14.2m people volunteered, returning the level to pre-pandemic figures (Tabassum, 2023) although the frequency of volunteering had also fallen. Although over half the population volunteers informally, only about one quarter of them do so regularly. Formal volunteering has seen the most significant drop following the pandemic, those volunteering at least once a month dropping from 23% in 2019/20 to 16% and those volunteering at least once a year falling from 27% to 27% in the same period (Tabassum, 2023). A recent ruling in *Groom vs. Maritime Coastguard Agency* (Kisby, 2024) highlighted how a requirement to meet a regular volunteering commitment and a level of remuneration could in some circumstances lead to the volunteer being considered a worker. All of these issues will potentially exacerbate the issues of finding volunteers generally as well as find those willing and able to take up additional roles, including volunteer leadership/management roles

2.4 Management of Voluntary Organisations

Butler and Watson (1990) identified a lack of research into the management of charities as well as change management, organisational design and strategy development; Anheier (2014) notes that although the sector has increased significantly in importance, the research into the organisations themselves has been limited and often focused purely on the economic aspects. The piecemeal approach and lack of cohesive social science research has reinforced the “two-sector world view” (p.15) where the options are seen as *either* a market *or* a welfare approach rather than being able to consider both. This is a view echoed by Einolf (2018) generally and in specific areas by others; the lack of appropriate leadership research in the sector is highlighted by Jäger, Kreutzer and Beyes (2009), Posner (2015), Terry, Rees and Jacklin-Jarvis (2020) and Jacklin-Jarvis and Rees (2022), with Alizadeh *et al* (2021) and Fullwood and Rowley (2021) commenting on the lack of research into learning and development.

Culture has a significant impact on how any organisation functions; Linstead, Fulop and Lilley (2009) identify a range of theories which support the development of organisational culture, and whilst none relate directly to voluntary organisations, both

negotiated order theory and ethnomethodology could be applied to the sector. Negotiated order theory claims that different groups in an organisation have different views of priorities, ethical behaviour and decision-making, role responsibilities and so on and this reflects the challenges of running a successful organisation where both staff and volunteers have clear, often different or even conflicting views about what should be done, how and by whom (Kreutzer and Jäger, 2010). Ethnomethodology focuses on how the unspoken and taken-for-granted features of an organisation, as well as stories and rites, form the behaviour and thus the culture of an organisation. This too can be considered relevant to voluntary organisations where the above aspects can potentially differ between different groups e.g. staff and volunteers and also between those doing the same roles in different, dispersed geographical locations. This could be considered a sub-culture also. By contrast Handy (1990) considers his definitions i.e. club, person, role and task culture specifically in relation to broad categories of voluntary organisation. These differences relate to the primary function of the organisation e.g. mutual support, service delivery or campaigning. Handy (*ibid*) asserts that different functions engage different volunteers, processes, structures and cultures and that larger voluntary organisations may well exhibit different cultures at different levels.

Handy's (1990) view of function being related to culture also creates a link to organisational structure and approach. He observes that service delivery organisations by their nature are managed organisations since they will often have activities which have a range of formal requirements. These may be related to regulator body reporting and legislation or to internal drivers such as the decision to centralise or decentralise (Butler and Watson, 1990). Structures vary and different approaches bring their own challenges, for example in a divisionalised structure tension can arise between the divisions regarding local and central knowledge and how this informs decisions. Finding the right structure for any organisation can be challenging, but with non-profits the amount of change already identified above and the different focus on values rather than profit (Anheier, 2014) means that traditional structures may be less suitable.

Non-profits can demonstrate a tendency to adopt structures which are similar to those professional organisations in their field (Anheier, 2014; Villadsen, 2013). This leads to a level of homogeneity known as isomorphism. DiMaggio and Powell

(1983) outline three key types which help explain the move towards a more structured and professional approach to many aspects of running voluntary sector organisations, including leading and managing volunteers, whether carried out by paid staff or unpaid volunteers. These are coercive, mimetic and normative and are often a response to uncertainty. Coercive isomorphism is demonstrated when pressure is put on organisations to conform to certain expectations. A significant example of this is the professionalization of voluntary sector organisations through the increased application of business practices such as certification, training and development, management and formal accountancy processes, as discussed elsewhere in this chapter. This is primarily driven by government and other funders. In contrast mimetic isomorphism occurs where voluntary organisations face financial uncertainty and respond by adopting business approaches to provide more certainty. Normative isomorphism stems from the requirement for voluntary organisations to adopt the ethics and regulatory practices of the professional field to which they are aligned. For example, welfare charities involved in similar work to social services will adopt these, regardless of how appropriate they are for the actual form of the organisation (Paton and Cornforth, 1992; Leiter, 2013; Anheier, 2014).

Structure then influences strategic decisions and approaches (Butler and Watson, 1990) however this is often not considered in relation to charities since strategy is usually associated with profit, revenue and competitive advantage. Since voluntary and non-profits are not driven by profitability, and this is often used as a basis for setting goals and measuring success and progress, this is one key influence on identifying strategic direction. Additionally, whether an organisation is a trading or non-trading entity is a further difference since the need to balance supply and demand varies, with a trading organisation stimulating demand and having a degree of flexibility to diversify to grow the business, whilst a non-trading organisation is more likely to have to limit supply, be unlikely or unable to diversify. Charities do not have a simple correlation for many of these, meaning the emphasis will be more individual to each organisation and related to the specifics of the service they deliver. Voluntary organisations may be more likely to have a cooperative strategy, since they are reliant on organisations who provide funds, and who may also provide volunteers and recipients of the organisation's work, thus providing a more complex set of stakeholder relationships (Butler and Watson, 1990; Paton and Cornforth,

1992). These cultural differences influence strategy in other ways: a more participative approach to decision making; the importance of the organisation's values; commitment of staff to these values; engaging appropriately with volunteers e.g. not treating them like hired hands; understanding the values and motivations of those involved. This presents different challenges in relation to strategic management (Paton and Cornforth, 1992; Anheier, 2014). The key differences identified are related to leadership and management skills and approaches and wider factors which motivate and engage volunteers including their priorities and how their skills are utilised.

2.5 Motivation

Anheier (2014) considers motivational factors amongst volunteers and refers to Barker's 1993 (p.258) classification of motives, namely altruistic motives such as compassion for those in need, instrumental motives such as gaining new skills and obligatory motives such as meeting a moral or religious duty. He notes that these do not occur in isolation and that overall motivation can be complex, so managing them to best effect is critical. Research shows that, as with employees, there is an expectation of an exchange or return. Whilst for employees this exchange is financial, for volunteers the anticipated returns include personal achievements, developing new skills, relationships and making a contribution to society. Volunteers require different management, since paid staff would be managed through financial incentives and volunteers through approaches related to commitment and longer-term benefits (Willis, 1992; Anheier, 2014). Effective communication, recognition, rewarding work and networking with others are further identified by Taylor *et al* (2006) with management style being a strong focus of work by Stirling, Kilpatrick and Orpin (2013). All of these contribute to keeping volunteers engaged with the organization.

Taylor *et al* (2006) and Willis (1992) also identify volunteer participation, specifically in the areas of policy and decision making as key. Lack of effective involvement here can lead to disengagement and disillusion. Failing to focus on managing the volunteer lifecycle; lack of appropriate management and development of people through formal HRM and HRD processes as well as not matching volunteer skills to

specific roles will result in lower engagement and retention (Willis, 1992; Stirling, Kilpatrick and Orpin, 2011; Anheier, 2014). There is a likelihood that the use of formal, corporate, management approaches will risk marginalising the volunteers (Dartington, 1992). That said, the strongest motivators to volunteer are wanting to make a difference, or the importance of the cause. Learning new skills is a motivator, but far less significant (Tabassum, 2023).

The challenge of meeting all these requirements can be helped through the increased focus on strategic management and resource planning and a management style which reflects whether the organisation is run by staff (Willis, 1992; Anheier, 2014). However, volunteers and paid staff will hold different views on priorities, levels of responsibility and direction of the organisation, as well as values, and this can lead to a level of intra-organisational conflict (Kreutzer and Jäger, 2010). This is most commonly related to both resource and people management since volunteers are looking for a management system driven by relationships and understanding of the service-users'/beneficiaries' issues whilst paid staff are looking for a structured management process which provides control and views staff's professional i.e. qualified, status as key. This reflects Liao-Troth's (2012) view of the importance of volunteer managers understanding the motivations of volunteers and what is important to them. These researchers' work is based on situations where paid staff have management responsibility for volunteers and does not consider what the issues are when volunteers manage volunteers. This trend has continued, and much of the literature used in this thesis which discusses leadership and management within the voluntary sector is predicated on the management/leadership of volunteers by paid staff. There also appears to be a lack of research into what might motivate volunteers to take on voluntary leadership/management roles when the literature often comments on how hard it is to do this (Freund, 2017), how under-researched it is (Jäger, Kreutzer and Beyes, 2009; Alizadeh *et al*, 2021) and how little is understood about the differences (Posner, 2015).

2.6 Leadership/Management Skills and Approaches

A question often asked by academics is whether there is any difference in management and leadership within the non-profit and other sectors (Dartington, 1992; Paton and Cornforth, 1992; Willis, 1992; Anheier, 2014; Carvalho and Sampaio, 2014; Senses-Oyzurt and Villicana-Reya, 2016). There are a range of views in response to this. Anheier (2014) makes a clear distinction between management within non-profit organisations and leadership. The former covers strategic level management of the organisation, its wider resources, formal standards and output controls with the latter being more closely related to relationships with others. He offers the view that management in non-profits is based on practices from the business and public administration sectors and suggests that given the similarities between these three organisation types, it could be argued there is no need for an approach to management designed for non-profits. However, when the differences in structure, purpose and functions are considered, there is also an argument for a bespoke approach to management.

Paton and Cornforth (1992) support this latter view, suggesting there are differences between managing in these environments and that an understanding of these is critical to help identify which practices from other sectors are transferable, and which not. Einolf (2018) questions if a universalistic best practice approach to HR management is appropriate in the sector whilst others such as Terry, Rees and Jacklin-Jarvis (2020) and Mumbi and Obembe (2022) note the importance of a more collaborative leadership approach, one which is less often found in business. However, different types and sizes of organisation, business, public-sector and voluntary, require different approaches and whilst some voluntary and non-profits may be successfully managed in a similar way to profit-making businesses or public-sector organisations, others will need a different approach.

Further, non-profit organisations are influenced heavily and differently by: their complex environments e.g. straddling both public and private sector service delivery; the espoused values and priorities of the organisation and the impact of this on stakeholders; change, including political influence; how the business functions such as accounting and personnel activities are carried out and integrated into the whole. These differences support the need for different approaches to management (Butler

and Watson, 1992; Anheier, 2014). The increasing professionalization of the sector is also raised by many, potentially intimating that previously management processes have been different (Dartington, 1992; Willis, 1992; Taylor *et al*, 2006; Chum *et al*, 2013; Anheier, 2014) with Khan (2020) identifying professionalisation as a move away from an emotional motivation to a more rational approach. Drucker (1990, in Anheier, 2014, p.336) asserts that the prevailing culture of non-profits can lead to the avoidance of conflict rather than to engagement in dissent which encourages growth and creativity. This does not mean that voluntary organisations are not competitive, in fact the reverse since they are likely to find themselves competing for a limited funding pot, source of volunteers with relevant skills and adequate time and also for the users of the service, who may have diverse needs and potentially a range of organisations to contact. And whilst the external environment will influence strategy, within charities the culture will also have an influence on the internal environment, charity culture can be moral, democratic participative and altruistic (Butler and Watson, 1990). This too supports the need for a different approach to management within non-profits.

As noted above, Anheier (2014) considers management at a strategic level and concerned with managing physical as well as people resources. Dartington (1992) concurs and observes that ideas seen as 'new' in the 1990s in management such as individuals wanting ownership of their role and tasks and the limited efficacy of an authoritarian approach had been standard approaches in voluntary organizations. There is a view that this approach has been superseded by a more leader-centric approach as the economic conditions have changed since the 1990s (Bratton, 2023b). The professionalization of management within the sector brings its own challenges however. A focus on management by objectives and the use of job descriptions rather than a focus on the values and roles required risks leading to an inflexible management approach which as outlined above can impact on motivation.

As already identified, the demands on managers in voluntary organisations are different. The majority of voluntary organisations are either small or medium enterprises (SMEs) or are run as such, thus managers require a more generalist set of knowledge and skills. Personal relationships and influence are highly significant and there is a high need for individuals' values to be aligned to that of the organisation, and thus related to levels of personal commitment (Paton and

Cornforth 1992; Anheier, 2014; Nesbit *et al*, 2016; Einolf, 2018). Many of the key relationships are with external stakeholders, making usual managerial influence and authority ineffective. This level of ambiguity and uncertainty within management is higher than in other forms of organization and has a requirement to manage conflicting expectations. Paton and Cornforth (1992) would suggest that the frequency and level of occurrence of these challenges is what differentiates them from other organisations.

Leadership implies a level of power and authority, and the sources of power within non-profits may be related to the type of organisation e.g. referent power, with its link to a cause or person, may be particularly important in an organisation where the goals and values are integral to membership whilst coercive power and the potential to punish or sanction others, may be less with volunteers whose motivation is value-driven rather than financial (Anheier, 2014). Dartington (1992) notes in contrast that within the sector good management takes place from a place of moral authority and uses influence as well as power, which resonates with the considerations around a different power dynamic shared by Jäger, Kreutzer and Beyes (2009), Posner (2015), Jacklin-Jarvis *et al* (2022). This resonates with more relational leadership and management approaches such as shared, distributed and servant leadership. When referring to leadership in the context of the voluntary sector there is a myth that leadership in the voluntary sector is predominantly charismatic but the reality is a stronger focus on collective teams and group leadership which can be aligned to distributed leadership (Dartington, 1992; Stanton, 1992). That said, the "us and them" relationship between managers and the managed is also evident here. This is further exacerbated by the tensions between paid staff and voluntary committees.

A significant consideration is the type of skills required by managers in the sector. Most of the research done considers this from the perspective of staff managing volunteers, which is clearly a reflection of both Anheier's and Dartington's views above. Paton and Cornforth (1992) observe that as most people spend their working life in the same sector or industry, they will have a negligible understanding of management practices in other sectors. Whilst this may have been true in the 1980s and early 1990s, the nature of employment and careers has changed significantly in the intervening years, influenced by the development of technology, economic pressures and demographic changes (ONS, 2018) and has been further impacted by

the Covid-19 pandemic of 2020, reducing labour force participation (Disney, 2024). This lack of exposure is also clearly not necessarily the case where the manager is a volunteer. Any management experience gained in a formal workplace setting as a paid employee is more likely to be outside the voluntary sector. This supports the challenges identified by Paton and Cornforth (1992), since here the manager who is a volunteer may try to implement the management approach from their paid work and find that this is not effective, or worse, destructive, in the voluntary environment. In contrast, Gordon and Gordon (2017) and Palanski, Hammond and Khazanchi (2022) highlight the benefits for business of leadership skills acquired through volunteering, resulting in development of the whole self as a leader and more effective relational leadership. The need for developing management skills appropriate to the voluntary sector would seem to be underlined by this.

Although often overlooked in the research, VVMs are an integral part of many smaller charities and also large ones such as Samaritans, the RNLI and the wider scouting and guiding organisations. Whilst organisations would probably be able to provide details of how many paid VMs they employ, it is questionable if they could provide data about VVMs. It is therefore unclear which is the bigger group – paid VMs or VVMs. For example, if you consider that Samaritans has over 200 branches/hubs, each with a Director and a leadership team of 3-13 and several regional officers with leadership responsibilities in each of the 13 regions, the number in leadership roles is a minimum of 1000 volunteers, yet the research often ignores this significant body of volunteer leaders, potentially reflecting the lack of value placed on them (Posner, 2015; Nesbit *et al*, 2016; Alizadeh *et al*, 2021).

Reaching out to contacts in three large charities, two of which deliver volunteer-led and run services and the third has a significant section of their service delivered by volunteers, it was evident that there is a significant lack in the data relating to both paid VMs and VVMs. One of the organisations was able to identify at local level which staff had LM responsibility for volunteers but not at an organisational level. A new volunteer management system would mean that in future they would be able to identify volunteers with leadership/management responsibility for other volunteers. Further challenges are that the job title may not use the term Volunteer Manager and the job description may only mention volunteer management, the importance of it and the skills required may not be included as part of an essential

criteria/competency requirement and training, when provided, is not mandatory (Visor, 2024). At the second organisation a centrally held database meant that since the late 2010s the information on who had volunteer leadership/management roles would have been available although it would be dependent on accurate and timely information being entered. Previously this information would not have been available (Bentley, 2024). The third organisation had only limited data on roles volunteers held, leadership or otherwise, across the organisation (Reynolds, 2024). This further supports and the general lack of importance with which volunteer managers are viewed (Nesbit *et al*, 2016).

One possible risk is philanthropic amateurism (Anheier, 2014) where the sector uses potentially unskilled volunteers to carry out roles because paid professionals are too expensive. This assumes however that a skilled professional is needed and whilst this may not always be the case, this thesis will argue that a level of appropriate skills is required for leadership and management roles within the voluntary sector. This risk is highlighted elsewhere with research into involuntary volunteer managers and the need to invest time into their development (Nesbit *et al*, 2016). Providing opportunities to develop LM skills is key to attracting volunteers to take on leadership/management roles (Freund, 2017), but succession planning is not easy if volunteers either do not usually aspire to leadership roles (Jäger, Kreutzer and Beyes, 2009) or there is an assumption that they are not interested in them (Greene and Ward, 2016). De Clerck *et al* (2021) highlight the expectation that professional management approaches are used within voluntary organisations but Alizadeh *et al* (2021) point out that there is very little research into L&D within non-profits, particularly in respect to leadership, and there is also a lack of research into how leadership practices for VVMs may differ for those in paid roles (Posner, 2015).

A different view is offered by Gee (2023a) who considers the link between career and progression and how these are often viewed as solely related to paid work and a linear upward trajectory. He comments on a change, also noted by Whitehead (2024), whereby volunteering is now more often seen as something to help get a job i.e. a means to an end, rather than an end in itself, directly contradicting the view that volunteering is driven by some level of altruism (Waikayi *et al*, 2012; Anheier, 2014). Volunteering then becomes seen as part of a broader view of career, including a

wider social element (Gee, 2023b). Research into volunteer motivation identifies that meeting people and making friends is an important motivator (Tabassum, 2023).

2.7 Conclusion

It can be seen that the sector is made up of a wide range of organisations, and that although some of the challenges faced by these organisations are the same as those faced by for-profit and public sector organisations, there are also significant differences. These relate primarily to the purpose and focus of the organisations, different stakeholders and their motivation, power relationships and an ongoing discussion about whether the sector needs a different approach to leadership and management from the for-profit sector. There is a gap in the literature relating to LMD in the sector and also in relation to volunteer and paid volunteer managers. Leadership and management and the development of these skills is explored more fully in the following chapter, the literature review.

Chapter 3 – Literature Review

3.1 Purpose of the Literature Review

The purpose of a literature review is to show awareness and comprehension of published work in the researcher's field of interest (Bryman, Bell and Harley, 2022). They note that a significant challenge for researchers is identifying what literature is relevant to the research before conducting it and carrying out the analysis, making this an iterative process. It is particularly helpful when conducting inter-disciplinary research (Snyder, 2019). There is limited research into leadership and management in the voluntary sector and leadership and management development (LMD) (Alizadeh *et al*, 2021) particularly for those volunteers in middle-management equivalent roles, where carrying out both leadership and management tasks is required (de Clerck *et al*, 2021). Hence this review also includes sources focused on leadership, management and the development of these skills in mainstream literature which rarely, if ever, considers the third sector at all. Other challenges have been in locating research into what/how followers learn from leaders/leadership through observing and experiencing it, something discussed by Kempster (2006) and Earley (2012) in relation to educational settings but not featuring in much of the LMD literature, and emotional labour. Emotional labour (EL) is recognised predominantly in healthcare and considers how an individual manages their emotions in a context-appropriate way regardless of how they really feel about the situation (Guy-Evans, 2023). This is a topic discussed in nursing (Sawbridge and Hewison, 2013) and other related sectors such as sports psychology (Hings *et al*, 2020), but again noticeable by its infrequent consideration in the mainstream LMD literature (Humphrey, Pollack and Hawver, 2008). However Greene and Ward's (2016) research into the National Trust and the relationship between paid staff and volunteers identified that managing volunteers requires a much higher level of EL than managing paid staff.

The lack of consideration of the voluntary sector, and often other non-profit environments such as public-sector organisations, meant that where textbooks were used, it was to analyse the current broad trends and views in relation to the topics of management, leadership and appropriate skill development. A further challenge in this area is that whereas texts on leadership and management are plentiful (Barends

et al, 2023) and HR texts are regularly updated with new editions, texts on Learning and Development are fewer and updated less frequently. Peer-reviewed journal articles on voluntary sector issues were available, and where these were about leadership or management and the development of these skills, they were most often about Board level roles such as CEOs and Trustees or were considering how paid staff managed/led volunteers rather than other volunteers. This meant that a wider search of sources was needed. Historically theories discussed in the business-related literature have often been built on US- and UK-based research, with either an adoption of US practices in the UK, or a similarity between the two meaning any differences are acceptable. However, the volunteering landscape can have more significant differences than the business one, so an awareness of this when researching was needed. The final challenge with finding relevant literature was the variety of terms used. Volunteer, voluntary, volunteering, volunteerism, third sector, non-profit and not-for-profit are all terms found relating to the volunteering aspects, but also the terms leadership and management are often used interchangeably, as are the terms training, learning, development and sometime human resource development (HRD). This made a comprehensive review of the literature a challenging activity.

As noted by Terry, Rees and Jacklin-Jarvis (2020) there is a lack of research into leadership and management in the voluntary sector, and those approaches deemed most effective in the sector are not those routinely used in business settings (Bratton, 2023b). Add to this the acknowledgement that leadership and management development in the voluntary sector is poorly researched and consequently poorly understood (Alizadeh *et al*, 2021) and it becomes apparent that much of the mainstream literature on leadership, management and development of these skills will not be appropriate for this research. Literature that focuses on leadership and management theories not identified as appropriate for the voluntary sector has been excluded from this review, allowing a fuller review of relevant approaches. There is also a range of different methods posited to develop leadership and management skills, and again many of these reflect a profit-based view of skills required, which is not appropriate to voluntary sector leadership. A further driver here is access to appropriate resources and the funding of high quality LMD. Identifying appropriate approaches is reliant on the sector and individual

organisations being clear about what leadership and management for volunteer volunteer managers and leaders looks like for them so applying specific methods such as a skills-based approach means that these basic questions need to be answered before making decisions about the best or right way. Failure to provide meaningful leadership development that matches participants' expectations is ineffective at best and can lead to individuals leaving the organisation (Kjellström, Stålné and Törnblom, 2020) and poor leadership leads to both staff (CMI, 2023) and volunteer turnover (Holtrop *et al*, 2024). Leadership development activities can take place at a range of different levels, from generalised individual development through development to support a specific role to developing the skills needed to align with the organisational perspective and contribute to a collective leadership approach (Kjellström, Stålné and Törnblom, 2020) further supporting a view that a better understanding of leadership and management and LMD is needed.

This chapter will therefore provide a review of literature relevant to leadership and management within the voluntary sector, as well as a brief overview of leadership and management theory more generally. It will also consider how leadership and management skills are developed, how these approaches may be connected to leadership and management theory and how they are applied to the voluntary sector more specifically.

3.2 Leadership and Management

This section will provide a brief overview of the development of leadership and management theories and then focus on those theories which may be most applicable to the voluntary sector. It will provide a critical analysis of this, identifying where theories and approaches can be seen or applied to the sector and consider if and how these are applied in the for-profit, public and voluntary sectors as well as their relative effectiveness in different environments. Leadership and management theory can be applied at a range of levels within organisations; however this research is focusing on those managing and leading volunteers at a middle management position. Although definitions of the terms will be discussed, the terms are likely to be used interchangeably in places, reflecting current practice in the wider literature.

3.2.1 Defining Management and Leadership

Modern management is variously described as stemming from the Industrial Revolution (Gill, 2011); being based in organisational design (Buchanan and Huczynski, 2019) and organisational behaviour (Robbins, Judge and Campbell, 2017) with these latter stating managers “get things done through other people” (p.5). Early management theories include Taylor’s Scientific Management, Weber’s Bureaucracy and Fayol’s Classical Management Theory (Buchanan and Huczynski, 2019). Fayol’s work identified a range of managerial activities which involve planning, organising and controlling processes. Fayol’s work in the early 20th century reflected the need for organising and structure at a time when there was significant change and growth in business and is still used today across a range of organisations. There are however criticisms of it in terms of its focus on control and a standardised approach without consideration of people, conflict, differences and complexity (Buchanan and Huczynski, 2019). From Fayol’s work Robbins, Judge and Campbell (2017) define the manager’s role as planning, organizing, leading and controlling. This clearly identifies leading as a part of the wider management role. This can be compared with Mintzberg’s research which identified that managers’ roles are interpersonal, informational and decisional, encompassing the roles identified from Fayol’s work. Ladkin (2015) makes a further distinction between managing and leading, in that the former usually requires a level of authority and formal position, often with a level of power attached and tends to be about coordinating activities. In contrast the latter can be seen at different levels of an organisation, requires no formal authority or position and further requires followers to actively support the actions or views of the leader.

Managers function within organisations, which Robbins, Judge and Campbell (2017) define as a “consciously co-ordinated social unit” and consequently third sector organisations as well as commercial businesses fall into this definition. Rosenfeld and Wilson (1999) concur with this view and add that there are many similarities with for-profit organisations as they have structures, functions and communication networks as well as formal hierarchical structures, derived from a managerialist perspective (Mumbi and Obembe, 2022). However in other ways there are substantial differences. Key requirements for managers are generally defined as relating to the management of inputs, outputs and internal organisation although

there are some key differences between managing these in the voluntary sector and doing so in the private sector. These differences are reflected in a variety of areas: number and type of contracts with suppliers such as individual and corporate donors, governing bodies and volunteers; managing volunteers rather than staff requires a different approach; various organisational processes such as job descriptions may not be appropriate and issues such as motivation and leadership may be different (Rosenfeld and Wilson, 1999). Kreutzer and Jäger (2011) identify how managers in voluntary organisations seek structure and formal process within the organisation, whilst volunteers can feel this is a waste of resources which could be used elsewhere and can be concerned about the impact this has on the “soul” of the organisation.

Taylor (1996) agrees with Handy (1990) that different types of voluntary organisations will approach management differently and further notes that management issues are often related to ethical dilemmas driven by motivation of volunteers to do the best they can. Interestingly, Taylor’s focus is on management of processes, not people whereas the focus on the management of people and the relationships between them is a common theme in other management research. Rosenfeld and Wilson (1999) and Kreutzer and Jäger (2011) note that the desire for formal and professionalised managerial processes can conflict with volunteer motivation and cause resentment, a view supported by Mumbi and Obembe (2022). Additionally, Hodges and Howieson (2017) and Terry, Rees and Jacklin-Jarvis (2020) comment on the lack of consensus on what good leadership in the sector looks like. This consensus over more than 20 years clearly demonstrates that change in management and/or leadership practices is slow in the sector.

To successfully manage non-profits, the organisation needs to demonstrate a clear mission and positively utilise their human resources e.g. use Board Members’ expertise as a key resource; understand how to use volunteers’ skills to maximise opportunities (Pointon, 2010). Approaches such as providing feedback, recognition and a pragmatic approach to relevant training whilst understanding volunteer motivation and managing staff/volunteer relationships and engaging volunteers support this. Burnell (2001) acknowledges that volunteers can be managed either by paid staff or other volunteers and that this should be different from how paid staff would be managed. However, as is often the case, volunteers are seen as

secondary within the organisation insofar as they supplement the work staff do. The difference between paid and unpaid work is a significant differentiator between for-profit and non-profit organisations (Paton and Cornforth, 1992) further evidencing the challenges. The many differences between profit and non-profit organisations call into question the suitability of using managerial processes in non-profit organisations when these processes have been developed and researched almost exclusively in profit-making organisations (Akingbola, 2013; Posner, 2015; Terry, Rees and Jacklin-Jarvis, 2020; Jacklin-Jarvis and Rees, 2022; Ivanovska Hadjievska, Johansson and Altermark, 2023).

Although leadership can be seen as an ancient topic, going back to Sun Tzu's Art of War and beyond, business leadership theories are a more recent phenomenon. Buchanan and Huczynski (2019) note that in 1896 the US Library of Congress had no books on the subject of business leadership whilst today the global body of work is on the topic is vast. Harrison (2017, p.2) comments that leadership is an "elusive concept" without an agreed definition, a view supported by Terry, Rees and Jacklin-Jarvis (2020); both Harrison (*ibid*) and Gill (2011) comment on the amount of scholarly research and online information available on the topic. There are a variety of definitions of the term: Stogdill defines leadership as being about influence (Buchanan and Huczynski, *ibid*) whilst Robbins Judge and Campbell (2017, p.332) define it as "the ability to influence a group towards the achievement of a vision or a set of goals". Dai and Tymon (2016) differentiate between leaders and leadership, with the former being about the individual and the latter about a wider organisational approach; Terry, Rees and Jacklin-Jarvis (2020) also highlight this within volunteer leadership.

Gill (2011) offers a range of definitions including this one from the Leadership Trust (p.7) "leadership is using our personal power to win the hearts and minds of people to achieve a common purpose". He explains how the importance of excellent leadership is constantly being discussed but there is still no common view of what it is, or even whether the skills could be taught or learned. He summarises the various views to provide this definition (p.9) "leadership is showing the way and helping or inducing others to pursue it". He adds that this requires the leader to be able to engage others, to give them the authority and confidence to achieve clear goals supported by values and strategies which are meaningful and well thought out. Most

of the above authors also note that whilst leadership is perceived to be a critical contributor to successful groups, be they business or sports teams it is not solely linked to the power structure and can be evidenced at all levels of the organisation, with the importance of this in the voluntary sector being reinforced by Ivanovska Hadjievska, Johansson and Altermark (2023). Many of the leadership definitions focus on the process of leadership, rather than the behaviours required with 13 of the 18 leadership definitions in Harrison's (2017) table focusing on this, 3 on behaviour and 1 on ability.

What becomes clear from these views is that there are a number of common beliefs relating to leadership such as influencing others, having a goal or purpose which is meaningful to the leader and to them. This links to Pointon's (2010) view, and it could be argued that what she states as contributing to effective management is in fact effective leadership. Those in management and leadership positions need both skill sets to function effectively in an environment where the soft skill elements are increasingly important (Harrison, 2017).

Historically there has been an academic divergence about the roles of leadership and management, with Bennis and Nanus (1997) identifying key differences between the roles which can be seen to broadly align with Fayol's approach to management alongside their concept of transformational leadership which has led to a perception that management is less important than leadership. Algahtani (2014) provides a summary of the variation in views from the two being mutually exclusive to a view that they are inter-related. The need for integrating both roles is seen as increasingly important (Yukl and Lepsinger, 2005; Buchanan and Huczynski, 2019). When conducting a literature search on the relative importance of the two terms, it is interesting to note that the more recent publications are more strongly focused on leadership with management as a subset of leadership, for example Yukl and Lepsinger (2005) identify task-oriented behaviours as part of leadership behaviours. This moves closer to Mintzberg's view that in practice the two are complementary and both are necessary (Buchanan and Huczynski, 2019). The word manager is more often evident in job titles than the word leader, and the roles often reflect the need for both leadership and management activities (Bezboruah, 2011), with a potential conflict for the individuals in how to balance these (Elmholdt *et al*, 2016). The level of VVM being researched in this thesis, i.e. more aligned with a middle

management role rather than a senior/trustee role, is likely to be using both leadership (people) and management (task) skills to fulfil their roles.

3.2.2 Key Theories

There are many theories of management and leadership, the most commonly discussed designed for and used in commercial business settings. Additionally, historically it was assumed that leaders had to be men, so twentieth century research was predominantly carried out by men on men. When the central tenets of volunteering such as altruism, an unpaid activity, and time willingly given are considered it can be seen that many approaches will therefore be either less or not at all relevant in a volunteering setting. This could also be influenced by the fact that although more women (58%) than men (52%) volunteer (Tabassum, 2023), and women work 64% of the paid hours in the charity sector, only one third of the largest charities has a female CEO and over two thirds of senior Trustee roles are held by men (Gomez *et al*, 2023). Data on VVMs is highly unlikely to be available for the sector, information from the Association of Volunteer Managers (AVM) about membership suggests that at least two thirds of their members are women (Peake, 2024). It is unclear if this historical bias in research excludes or discourages women from applying for these roles, or if it is a reflection of wider societal biases although Terry, Rees and Jacklin-Jarvis (2020) mention challenges for female leadership in the sector and the apparent lack of research into this. This thesis does not provide an opportunity to investigate this further but could be an area for future research.

Human Relations theory, with its basis in the early 20th century (Buchanan and Huczynski, 2019) focuses on the role of social relationships and behaviour in workplaces as well as the importance of group membership and personal identity. Issues such as the management of relationships and the formation of the psychological contract are highlighted. Although there are a range of criticisms levelled at Mayo's research (Dingley, 1997; Bruce and Nyland, 2011) the approach is based on the view that good leadership and communications are crucial in providing motivated, engaged and productive employees, and also that the organisational climate is significant (Markert, 2008). This theory seems to provide a theoretical

bridge between the traditional management theories outlined elsewhere in this chapter, and more modern leadership theories.

Benmira and Agboola (2021) provide a summary of the development of key leadership theories and show how they progress from the view of natural born leaders to a focus on leaders' actions then to how they can adapt their style and finally to what they label "new leadership". This covers those theories popularised in the 1990s and early 2000s. In the 21st century theories, there can be seen a move towards a more inclusive leadership approaches, considering relationships between leaders and followers and a more person-centred approach.

Era	Period	Theory	Description
Trait	1840s	Great Man	Focus on natural born leaders
	1930s–1940s	Trait	Focus on identifying traits and characteristics of effective leaders
Behavioural	1940s–1950s	Behavioural	Focus on the actions and skills of leaders
Situational	1960s	Contingent and Situational	Focus on leaders adapting their style taking into account the environment
New leadership	1990s	Transactional	Focus on leadership as a cost–benefit exchange
	1990s	Transformational	Focus on an inspirational style pushing followers to higher and higher levels of achievement
	2000s	Shared	
	2000s	Collaborative	Focus on followers leading each other
	2000s	Collective	Focus on engaging followers. Person-centred style
		Servant	Focus on the whole system of an organisation
	Inclusive		
	Complexity		

Figure 3.1: Summary of main leadership theories (Benmira and Agboola, 2021)

The earliest theories, such as traits approaches where Great Man and Trait theory outlined a range of traits which were supposed to identify good leaders. However the more research was done, the more were identified, and many were felt to be vague. This improved when the many traits were classified under the Big Five traits (Robbins, Judge and Campbell, 2017; Buchanan and Huczynski, 2019) and has also returned in the development of charismatic and transformational leadership (Harrison, 2017). Concerns over the vague nature of many of the traits led to the development of behavioural theories of leadership focussing on how leadership could be trained. Criticisms of these include the lack of consideration of all leadership behaviours (Harrison, 2017). In turn contingency theories have been developed (Robbins, Judge and Campbell, 2017; Harrison, 2017) which consider the different relationships between leaders and team members, tasks and power and the impact of context and environment on leadership. Whilst contingency theory

considers how leaders could adapt their behaviour to different situations, arguing there is no ideal leadership style, its shortcomings are inconsistent results and a lack of understanding of why different approaches work in different situations. Situational leadership focuses on how the leader would adapt their style to fit the environment (Buchanan and Huczynski, 2019; Benmira and Agboola, 2021), thus requiring the leader to be able to read the situation they are dealing with, as in contingency theory.

Transactional and transformational leadership are often discussed together and can be defined as “transactional leaders see their relationships with followers in terms of trade, swaps or bargains. Transformational leaders are charismatic individuals who inspire and motivate others to perform ‘beyond contract’.” (Buchanan and Huczynski, 2019, p.631). They note there are differing views on the wider ethical implications of transformational leadership, with some believing that the inspirational approach is good for organisations and employees whilst others suggest the opposite. Where a transformational leader destabilises an organisation to achieve their personal vision or sees themselves beyond the normal controls of the organisation or encourages employees to focus on going above and beyond, this can be damaging for the long-term success of the organisation and be harmful to employee motivation and well-being. Owen (2015) also focuses strongly on how leaders interact with people and on professional integrity, whilst Buchanan and Huczynski (2019) consider the different styles used by female managers as well as the positive impact of mixed gender groups in senior leadership roles in 21st century. As ideas about leadership change it can be seen that different factors such as a more complex and dynamic organisational environment continue to influence the development of new theories (Benmira and Agboola, 2021).

More contemporary, relational theories seen as being relevant in the voluntary sector such as shared/collaborative/distributed leadership (Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022; Jacklin-Jarvis and Rees, 2022; Ivanovska Hadjievaska, Johansson and Altermark, 2023) and servant leadership (Erdurmazli, 2019; Ngah, Abdullah, Mohd Suki, 2021) will be discussed in more detail below.

3.2.3 Relational Theories

Terry, Rees and Jacklin-Jarvis (2020) identify that a more appropriate style of leadership in the voluntary sector is to consider theories which consider “plurality of leadership”. They discuss a range of theories including shared and distributed leadership under the umbrella term of collective leadership and consider common characteristics of these approaches without providing individual definitions for them. These characteristics include being developed relationally between more than two people rather than being focused on individual actions and including the voices of different stakeholders. A more pluralistic approach to leadership results in consensus being gained through influencing others (Sergi, Denis and Langley, 2012). These commonalities and the view that distributed, dispersed, shared and team leadership are the same approach is shared by Gill (2011), Buchanan and Huczynski (2019) and Bratton (2023a). Gill (*ibid*) also comments that leadership needs to be evident throughout the organisation, a view shared by Terry, Rees and Jacklin-Jarvis (2020). Although it was recognised as effective in large successful multi-national corporations as early as 2000 there is a historical cultural resistance to seeing leadership as a collaborative rather than an individual activity (Gill, 2011).

However a collaborative approach is also seen as necessary in the more volatile and complex environments in which organisations function, making it appropriate for the voluntary sector. Johnson (2022) examines the role of nonprofit CEOs through the lens of transformational and shared leadership whilst Bezboruah (2011) is clear this is not transformational but servant leadership. Lindsay (2023) considers the role of both transformational and shared/distributed leadership in the public sector, and specifically how the heroic leadership models favoured in the 1990s have been superseded by a more relational and collaborative approach. This is driven partly by the failure of heroic transformational leadership to deliver the changes required in the sector and partly in response to the need for approaches that support cross-organisational working. It is interesting that much of this cross-organisational working is with the voluntary sector as government policy and decreasing public sector budgets mean that services have been tendered out or devolved to charities (Rees and Mullins, 2016). In spite of this, the issue of leadership within the sector is so often ignored in mainstream texts on leadership, even where the public sector is discussed.

In contrast to the above discussion, where the terms shared and distributed leadership are considered interchangeable, Goksoy (2016) argues that shared and distributed leadership are distinctly different, and notes that situational leadership includes the concept of sharing or distributing leadership. He defines shared leadership as a participative process between a range of stakeholders that is conceptualised by a focus on voluntary cooperation based on competencies and a sense of responsibility. Knowledge rather than formal position or role is important, which supports the link with situational theory. In contrast, distributed leadership is defined as the distribution of practices using collective work and learning and distributes the positions amongst team members. This approach provides opportunities for development. It is based on the belief that organisations are too complex to be led by one person since having all the characteristics to do this is not feasible. This relates more strongly to contingency theory rather than situational theory. Both approaches are not about the individual as leader, but about participation and cooperation. It can be seen that there are both similarities and differences between the two.

Bratton (2023b) discusses the rise of follower-centric leadership theories in the 1990s as opposed to more traditional leader-centric approaches and includes Leader Member Exchange, distributed and empowered leadership. He notes these theories “captured the zeitgeist of the 1990s” (p.31) and that the return of high-profile, charismatic corporate leaders means leadership focus has moved back to a leader-centric model. Buchanan and Huczynski (2019) also use the terms “trend” and “fashion” when speaking about distributed leadership, further supporting Bratton’s view of them as a less-permanent or possibly less-valid approach. Hazlehurst (2021) offers an alternative view, that different leadership styles can complement rather than replace each other although he does comment that perhaps “capitalism rewards more self-centred styles” (p.49). He also notes that good leadership is about what successful leadership looks like to the individual leader.

Buchanan and Huczynski (2019) comment that many accepted business approaches such as bureaucracy, hierarchy and short-termism undermine distributed leadership which broadly aligns with Bratton’s (2023b) view that leadership theory development is linked to competitive and economic drivers, which is a further example of how mainstream business texts on leadership and management rarely look outside the

for-profit arena. It could also be argued that this view of follower-centric leadership fits better in a non-profit environment. Relational leadership has its roots in social theory and focuses on reciprocity as a keystone of how relations are built, and thus how relational leadership can be viewed as a social process (Bratton, 2023a). Further, he explores how different ontological perspectives and relational focus i.e. dyadic or group relationships, categorise different types of relational leadership theories, as does Pye (2015).

3.2.4 Distributed and Shared Leadership

Although Goksoy (2016) presents a range of justifications to evidence that distributed and shared leadership are separate concepts, the terms are used interchangeably more than they are used to describe distinctly different approaches. Iszatt-White and Saunders (2017) offer the view that distributed leadership is in fact a catch-all term for a variety of terms including shared, collaborative and participative leadership with Jacklin-Jarvis and Rees (2022) using the term collective leadership to cover these approaches. For that reason, this next section will discuss some of the specific differences but also consider the approach more generically.

Distributed Leadership as a specific style is most often found in academic environments where it has become more widely used and discussed (Bratton, 2023a). It is seen by some as an antidote to a Western, individualistic view of leadership, commonly supported by more traditional theories such as trait theory (Thorpe, Gold and Lawler, 2011) and is seen as an effective style of leadership in the third sector (Duncan and Schoor, 2015). It is considered an approach whereby leadership and other activities in organisations are not necessarily reliant on an omnipotent individual leader but are achieved through a range of leadership activities undertaken by others within the organisation who may be formal and informal leaders, using a range of skills to support their leadership tasks including change management (Yukl, 2010; Harrison, 2017; Buchanan and Huczynski, 2019).

Bratton (2023a) agrees, adding that it is a more facilitative and coaching approach rather than a traditional vertical leadership structure and likens the empowering of subordinates to Peter Senge's view that leaders should be stewards and teachers. It offers an opportunity for a wider range of people to become involved in leadership

roles and activities, using their diverse skills and experience to support change and other aspects of leadership (Lumby, 2013; Buchanan and Huczynski, 2019). Harris (2013) identifies two main concepts within Distributed Leadership; the distribution of tasks and the distribution of influence and processes related to it; it can improve service delivery in complex organisations (Jakobsen, Kjeldsen and Pallesen, 2023). Harrison (2017) adds that the interaction between followers and leaders is also a key component. These views all support Goksoy's (2016) definition and support the assertion that trust is a significant element of the relationship in both types. Where skills have been gained outside of the volunteering environment, they have the potential to be used within the voluntary organisation, thus broadening the diversity of those in leadership roles and introducing new skills.

As a more recently researched and applied theory, there is still considerable discussion about the impact of Distributed Leadership and also disagreement regarding its effectiveness, but Harris and DeFlaminis (2016) and Canatelli *et al* (2017) argue that in spite of this, it can be a successful approach to leadership in a range of environments. Whilst it can be effective in entrepreneurial environments, one view is that it can be challenging in small business environments (Harrison, 2017) although Yukl's (2010) contradictory view is that it is more easily applied in small groups rather than at an organisational level. Feng *et al* (2017) argue that Distributed Leadership requires a robust approach since it is applied in environments which are subject to frequent and significant change and are increasingly complex. They identify the need for high levels of knowledge and collaboration and state that "leadership results from conjoint, synchronized agency and actions and dispersed enactment through three forms: spontaneous collaboration, intuitive working relations and institutionalized practices." This needs to be viewed both horizontally and vertically. However, it can also be seen as a fad, is "nebulous and difficult to define" (Lumby, 2016) and the lack of adequate definition means it can neither be endorsed nor can its impact be measured. Bratton (2023a) points to the challenges of applying a people-centric leadership approach based on trust, support and inclusion in environments where there are significant economic and financial imperatives alongside power imbalances, further supporting the view that this type of leadership is most suited to organisations where there are other focuses or priorities such as education, where it is frequently found, or the voluntary sector.

Whilst it can be viewed in different ways e.g. as a democratic process or as an evolutionary process in groups, Harrison (2017) notes that there is broad agreement that it involves sharing responsibilities within a group. It could also be argued that leadership in its broadest sense is a distributed activity, since it is concerned with influence and relationships and is found at all levels of the organisation; consequently, a distributed approach is informally carried out more widely than initially acknowledged. This links broadly to concepts of informal leadership (Pielstick, 2000) where leadership behaviours are evidenced in those who do not hold formal or titled leadership positions in the organisation and effective leaders are not always those with formal leadership positions (Robson, Begum and Locke, 2003). In the business academic literature this view is supported by Yukl (2010), Bolden (2011) and Caxton and Gold (2013) with Bolden also claiming that it is an approach which has gained ground in contrast to trait and personality-based leadership styles. As noted above, this is also supported in voluntary sector research (Terry, Rees and Jacklin-Jarvis, 2020; Jacklin-Jarvis and Rees, 2022; Mumbi and Obembe, 2022; Ivanovska Hadjievska, Johansson and Altermark, 2023).

The research in this area of leadership is often limited to the educational sector, so specific research into the uses of Distributed Leadership within the voluntary sector would provide a new insight into the potential use of this approach.

In contrast, a search for papers on Shared Leadership shows that although the theory was being discussed in the 1990s, much of the more recent research appears to be in its use in remote working, creativity and project management. Here too, research is most often found in education and health care but is also key in developing high performance teams (Kapoor, Noida and Agnihotri, 2015). They also state that all the skills to meet the needs of complex organisations will not be found in one leader, and that the leadership activities are shared or distributed amongst team members, both views which Goksoy (2016) relates to distributed rather than shared leadership, further supporting his view that the two terms are often conflated or used interchangeably.

Shared leadership is seen as interdependent, collective and relational and acknowledges the relationship between leaders and followers (Fletcher and Käufer, 2003; Freund, 2017). Laasch (2021) calls this interrelationship folleading and

defines it as being “centred on the inseparable practices of leading and following in pursuit of a group’s common purpose” (p.294). Although Laasch (*ibid*) does not use the term shared leadership or mention the voluntary sector in relation to following, his view of the process as ethical, responsible and sustainable as well as linked to a common goal serving society aligns with the concept of shared leadership and fit with how many voluntary sector organisations see themselves. Pye (2015) also notes that relational leadership requires an ethical approach. Within voluntary sector sources, the view that this approach promotes more effective teamworking, improved relationships and the need for high levels of trust between followers and leaders and is relational in nature is clearly supported (Jäger, Kreutzer and Beyes, 2009; Posner, 2015; Freund, 2017; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022; Ivanovska Hadjievaska, Johansson and Altermark, 2023).

Interestingly, Mumbi and Obembe (2022) identify that at higher levels within voluntary organisations, associated with trustees and employees, leadership is hierarchical even where shared leadership is present, whilst at lower levels leadership is associated with volunteers and is about shared values. This difference has the potential to lead to individuals excluding themselves from higher leadership levels through this difference in views and their own perception of their ability to carry out the role, in spite of the fact that within shared leadership it can be undertaken by anyone (Terry, Rees, Jacklin-Jarvis, 2020) and should provide opportunities for capability building (Freund, 2017). There is however no consideration in much of this literature given to whether everyone wants to undertake these responsibilities. Volunteers see leadership as a collective activity, whilst trustees (also volunteers, but differentiated here by level of seniority) see it as a responsibility consistent with their role, linked to power, which can lead to a lack of sharing of the authority required to support shared leadership throughout (Mumbi and Obembe, 2022). This supports Nesbit *et al*’s (2016) view that volunteer management (leadership) is often undervalued. In spite of this, Ivanovska Hadjievaska, Johansson and Altermark (2023) note that shared leadership is increasingly being adopted across the sector. The acknowledgement of the power present alongside the hierarchy echoes Buchanan and Huczynski’s (2019) assertion that a distributed leadership approach needs to run alongside a more hierarchical approach to be effective in for-profit organisations. Jäger, Kreutzer and Beyes (2009) note a lack of formal power

structures at all levels within voluntary organisations, whilst Posner (2015) identifies that volunteer leadership, by volunteers, is also based on shared values and has little positional power, regardless of hierarchy.

An interesting observation by Fletcher and Käufer (2003) is that many of the behaviours which characterise shared leadership are relational and not recognised as leadership behaviours in the traditional 'heroic' sense of leading. Instead, they are just seen as nice or thoughtful behaviours. There is also criticism that distributed leadership in its wider sense is a descriptor of a range of individual approaches (Iszatt-White and Saunders, 2017). Freund (2017) notes that changing to this leadership approach takes time and a sustained effort and suggests developing it in specific teams or activities initially, supporting the ability to build capacity within teams. This highlights one possible reason why although shared leadership is discussed theoretically, there appears to be a lack of consistent growth in its application in all sectors.

It can be seen that there is much crossover between the terms distributed and shared leadership and these focus on key areas such as trust, relationships, communication, honesty and shared values with a move away from traditional hierarchical and vertical management and leadership models.

3.2.5 Servant Leadership

In recent years there has been an increased interest in what is termed "authentic leadership" (Robbins, Judge and Campbell, 2017) which Larkin, Burgess and Connell (2023) define as being linked to the leader's values, usually integrity and sincerity, and having its roots in virtue ethics. They do however identify that this style of leadership can have drawbacks if the individual's values are selfish and lack integrity and if the followers' values do not align. Whereas they seem to use the term authentic leadership to mean ethical leadership, Robbins, Judge and Campbell (2017) identify ethical and servant leadership as being a style of authentic leadership. They note that whilst all in an organisation are responsible for making ethical decisions, the focus is more on the leader and their decisions since they set the ethical tone within an organisation, regardless of the type of leadership undertaken. By contrast Laasch (2021) sees authentic leadership as building honest

and open relationships and potentially using followers' suggestions to make changes, whilst ethical leadership is being guided by specific moral principles and doing the right thing. Ethical and authentic leadership can also be linked to transformational leadership, where the leader would need to use their charisma and influence in an ethical way rather than encouraging followers to behave in a way that benefits only the leader (Robbins, Judge and Campbell, 2017; Larkin, Burgess and Connell, 2023). Demonstrating values is not enough however, with leaders needing to be able to clearly articulate their values in a way that creates buy-in from followers. Yukl (2010) identifies integrity as a key fact in ethical leadership in general and particularly within servant leadership. Senses-Ozyurt and Villicana-Reyna (2016) confirms the importance of leader integrity in increasing volunteer satisfaction and leader inclusiveness in retention of volunteers. Whilst this further supports the need for integrity to feature in leadership practices within the voluntary sector, it also demonstrates – as with distributed and shared leadership above – that there is a distinct lack of agreement about some relational leadership theories.

Greenleaf's seminal work on Servant Leadership in 1977 identifies the increasing power of large institutions and an overarching leadership crisis (Greenleaf and Spears, 2002). This view forms the basis of his belief that to lead effectively, one must first be a servant "the servant-leader is servant first... It begins with the natural feeling that one wants to serve, to serve first" (Greenleaf Centre for Servant Leadership, 2016). Laasch (2021, p.310) also defines servant leadership as "pursuing the main objective to serve the group of followers" and suggests that one way of demonstrating this is to ask others to complete a task and the servant leader would be the first person to do this. This is similar to Bezboruah's (2011) view that nonprofit CEOs are servant leaders since they are serving the needs of the organisation and the Trustee Board. The key difference between this approach and traditional leadership is the desire to support other members of the organisation rather than accumulate power, a very different view from that traditionally held in organisation (Greenleaf and Spears, 2002; Ngah, Abdullah and Mohd Suki, 2022). More recent management research acknowledges the need to empower employees or followers (Yukl, 2010; Posner, 2015; Freund, 2017; Harrison, 2017) whilst Smith, Montagno, Kuzmenko (2004) note that servant leadership shares features of transformational leadership but is focused far more on the emotional needs of

employees and stakeholders. This can have a positive influence on organisational performance (Choudhary, Akhtar, Zaheer, 2013). Erdurmazli (2019) and Ngah, Abdullah and Mohd Suki (2022) identify it as a modern leadership approach suited to managing volunteers particularly in relation to its focus on growth and wellbeing of followers.

Power exists in servant leadership, but through persuasion and example rather than by coercion. By listening and understanding issues, rather than trying to identify responsibility or blame, the leader demonstrates the attitude of a servant (Greenleaf and Spears, 2002); followers are more likely to reciprocate and show higher levels of engagement (Aboromadan *et al*, 2022) and are motivated to learn new skills and stay with the organisation (Ngah, Abdullah and Mohd Suki, 2022) when servant leadership is evidenced. Other traits such as foresight, perception and gentle persuasion are identified as important for servant leaders. Smith, Montagno and Kuzmenko (2004) agree that Servant Leadership is based on characteristics and a range of key skills and add that members of the organisation are the main focus, rather than success or other stakeholders.

Greenleaf (Greenleaf and Spears, 2002) makes a distinction between management and leadership. The former includes setting goals and planning how to achieve these within the remit of the organisation, appointing others to support this and to assess performance of achievement of the goals. These activities would be carried out by those with an organisationally defined position in the organisation which gives them this remit. Leadership, in contrast, is a possibility for all in the organisation, regardless of role or level, a view supported by Terry, Rees and Jacklin-Jarvis (2020) and this is particularly the case for servant leadership, aligning with Senge (2002). This view partially reflects Mintzberg's view that leadership is part of good management.

Smith, Montagno and Kuzmenko's (2004) research shows that different leadership styles may be more effective at different phases of an organisational life cycle and also dependent upon the impact of internal or external factors. Servant leadership is effective where the organisational goals are centred on beliefs such as valuing people, personal growth and authenticity and also where the external environment is comparatively stable and the internal environment functions in a cooperative

manner. In spite of these findings, Senge (2002) reflects on the lack of uptake of servant leadership given the various business crises.

The level of change required to move to a servant leadership model requires the building of sufficient capacity (knowledge, skills, right people) to function differently and that takes time. That said, Blanchard and Broadwell (2018) cite case studies showing the application of servant leadership principles in organisations as diverse as national airlines and the military. The issues are often complex and “To stand up in front of people and say ‘you know this is a really complex issue, and I don’t think I understand it very well’ does not sound like leadership to most people in most institutions” (p.349). This requires a level of vulnerability which does not fit with conventional leadership views and supports the view of Fletcher and Käufer (2003) and Hazlehurst (2021) that many of the relational behaviours which support shared leadership are not perceived as traditional leadership behaviours. When considering the VUCA (Volatile, Uncertain, Complex Ambiguous) (Bennis and Nanus, 1997) business environment of the early 21st Century, Senge’s view on the level of change required and the corresponding lack of such suggests support for Smith, Montagno and Kuzmenko’s (2004) findings on servant leadership being more effective in organisations with more stable external environments. They suggest not-for-profits would benefit more from a servant-leadership approach, since the members of this type of organisation are likely to be more interested in organisational goals based around authenticity and valuing individuals. They may therefore prefer to avoid traditional business models. Greenleaf considers Servant-Leadership in business, education and foundations which provide money and although there are commonalities between these areas and the wider charity sector, there is no direct comparison. There is however a growing interest in the benefits of servant leadership in voluntary organisations as evidenced by Aboromadan *et al* (2022) and Ngah, Abdullah and Mohd Suki (2022) amongst others.

3.2.6 Situational Leadership and Leader Member Exchange

Hersey and Blanchard’s Situational Leadership theory (Mullins, 2007; Buchanan and Huczynski, 2019, Bratton, 2023c) can also be considered relevant, as it relates directly to the readiness of those being managed and the ability of the manager to

adapt to a variety of situations, with Daft (2017) considering it a relational theory. Bratton (2023c) identifies the importance of supporting behaviours in this approach, and the need to be responsive to subordinates, providing further, albeit implicit, support to Daft's view. This leadership approach can be seen to encompass the motivational and empowering elements of transformational leadership and the setting of goals and their achievement of transactional leadership (Cote, 2017), considering how willing followers are to engage in the task and providing guidance on how to proceed relative to this. Whilst it appears to have an intuitive appeal, the need to consider so many factors when leading, the lack of explanation of cause and effect and the challenges of testing its reliability mean that there is no convincing link between variables and outcomes (Robbins, Judge and Campbell, 2017; Bratton, 2023c).

There exists some degree of consensus with this statement and that lack of understanding of the needs of followers may be one cause of these difficulties (Geir and Glasø, 2015). Their research identifies how both followers' and leaders' attitudes to leadership can be influenced by the individual's view of both competence and commitment of the follower as well as the level of self-directedness. Leader bias and the risks inherent with self-assessing are contributors to this. Geir and Glasø's (2015) research was carried out in a business environment (banking) as was Hersey and Blanchard's original work (sales) but this approach can also have relevance in a voluntary setting. Here, the amount of direction given and levels of communication, related to the readiness of the subordinates all contribute to the overall impact of management upon volunteers, with a style personalised to the volunteer being the most effective (Stirling *et al*, 2011). Chatalasingh and Reeves' (2014) research shows how situational leadership was effective in responding to differing needs of followers in a healthcare setting, and they comment on the need to understand the relationship between the leader and the team member, whilst Usadolo and Usadolo (2018) note the importance of leader-member exchange (LMX) between managers and volunteers. This reinforces the relationship between this theory and leader-member exchange theory identified by Daft (2017) whilst Iszatt-White and Saunders (2017) comment that to be effective, distributed leadership needs to be both contingent and situational. It can be seen that there is overlap between many theories.

Leader Member Exchange theory (LMX) is a dyadic positivist theory (Bratton, 2023b) which describes how a leader builds a relationship with individual team members, with the subordinate's role being agreed through this relationship (Yukl, 2010; Bratton, 2023a). Leaders form high exchange relationships with a small number of subordinates, reinforcing the relationship and resulting in a dyadic high-exchange relationship with these subordinates being part of the "ingroup". On the other side are those in the "outgroup" where there is a "low-exchange relationship" (Iszatt-White and Saunders, 2017). Bratton (2023b) is clear that leaders should develop individual relationships with individual followers and considers both leaders and followers as stable entities. Considerations such as the psychological contract, congruence and equity are important in the relationship and overall the "ingroup" will go over and above in an employment situation. Given that there is specific reference in the texts to employment relationships, it is unclear if we could make the same assertions for volunteers or whether the different psychological contract would mean other critical factors in applying this in the voluntary sector.

There is some evidence that the existence of these two groups will eventually cause conflict unless the leader can ensure that all members feel valued, respected and offered what they perceive to be appropriate opportunities within the group (Yukl, 2010; Robbins, Judge and Campbell, 2017). Whilst there is broad agreement that LMX is based on a dyadic relationship, the theory has been defined and researched in a variety of ways: the views of both leader and member views in relation to what impacts on the quality of the exchange; behaviour between the parties; the leader's relationships upwards; the relationship between subordinate satisfaction and performance (Yukl, 2013). There is also significant research into the efficacy of LMX in positive subordinate behaviours and organisational outcomes (Yukl, 2013; Iszatt-White and Saunders, 2017), showing that although LMX itself does not consider or explain situational factors and their impact on the dyadic relationship, it can play a key part in supplementing situational leadership, which clearly states the importance of a dyadic relationship in valuing each subordinate.

3.2.7 Leadership and Management in Volunteering

Not only is there little research into how leadership practices for VVMs may differ from those in paid roles managing volunteers (Posner, 2015) but there also appears to be no consensus relating to how volunteers are managed i.e. in relation to how human resource management is carried out. That there is significant difference between managing paid staff and managing volunteers is generally agreed (Handy, 1990; Taylor, 1996; Brewis, Hill and Stevens, 2010; Studer, 2016; Einolf, 2018) but there is both a lack of agreement on whether and how to manage volunteers (Kolar, Skilton and Judge, 2016; Nesbit *et al*, 2016) as well as a lack of meaningful research in this area (Studer, 2016; Einolf, 2018). Studer (*ibid*) investigates the relationship between management strategies and the effectiveness of volunteer management. She considers on the one hand a classical, linear HRM approach, as used in a business environment, focusing on the practical aspects such as recruitment, induction and performance management and on the other hand a more relationship-focused approach. The former is concerned with aligning volunteer outcomes with those of paid staff whilst the latter considers how to manage or overcome any tensions between volunteers and staff and management groups and links strongly to the need for relational leadership identified throughout this chapter (Jäger, Kreutzer and Beyes, 2009; Posner, 2015; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022). She identifies a relationship between positive volunteer outcomes and a balance of transactional and relational management, however the relationships identified here are based on the premise that those managing the volunteers are paid staff.

Similarly Einolf (2018) notes that a best practice HRM approach is often used where paid staff are managing volunteers and that where volunteers are managing other volunteers, there is a tendency to use the shared passions and values to manage rather than formalised HR practices. Kolar, Skilton and Judge (2016) advocate a mix of the classical and relational approach, using the latter to motivate and retain volunteers, in line with Einolf's (2018) views and go further than Studer, noting the importance of legal aspects and considering the need for processes to discipline and even dismiss volunteers, albeit only by paid staff. Volunteers are themselves concerned with how they are managed (Taylor *et al*, 2006) and since they also have a psychological contract, as employees do (Liao-Troth, 2005; Erdurmazli, 2019),

providing the right kind of leadership and management which supports volunteers is key. It is interesting to note that although relational leadership approaches are discussed and there is an expectation leaders have a high level of emotional and cultural intelligence (Terry, Rees and Jacklin-Jarvis, 2020) and that many of the authors cited here e.g. Goksoy, 2016; Benmira and Agboola, 2021; Laasch, 2021, discuss the importance of communication and leader/follower relationships, there is no mention made of the emotional labour involved in the act of leadership itself.

Emotional labour (EL) is a concept recognised in many fields, particularly healthcare, where an individual manages their emotions in a way that is either prescribed or recognised as appropriate within that context (Guy-Evans, 2023). The individual will present an emotional response in a situation, or to another person that does not necessarily reflect their emotional reality, for example being polite and pleasant to rude customers. This is a common requirement in leadership and management roles, although it appears to be considered more frequently from an employee perspective rather than specifically for those managing and leading (Ertas, 2019; Lu, Zhang and Jia, 2019; Farr-Wharton *et al*, 2021). Emotional labour includes both surface acting, where the true feelings are hidden and deep acting, where thinking is adjusted to align with the emotion felt (Ertas, 2019; Lu, Zhang and Jia, 2019) and both they and Farr-Wharton *et al* (2021) note the negative impact of surface acting on wellbeing. Ertas (*ibid*) notes that although there is research which identifies the outcomes of surface acting, and it could be hypothesised from this that EL might impact staff decisions to leave, there is little work on the effects of EL in volunteering, although again this is an observation made in relation to volunteers rather than leaders or managers.

Research carried out by Brewis, Hill and Stevens in 2010 identified that 63% of volunteer managers are paid staff with only 17% of the remainder other volunteers, the balance being trustees or management committees. Given that less than one fifth of those with responsibility for managing volunteers is themselves a volunteer, it is easy to see why the research focuses on paid staff carrying out these tasks. Increasing the number of volunteers who are volunteer managers is something they identify as a growing trend with 13% of organisations with over 50 employees having volunteers with these responsibilities. This view is supported by wider anecdotal evidence from this research but more up to date evidence of this has been elusive.

Those in unpaid roles often had more management experience than those in paid roles and showed a lower turnover.

Whilst a number of the sources referred to above do relate to the management of volunteers (Handy, 1990; Liao-Troth, 2005; Taylor *et al*, 2006; Kreutzer and Jäger, 2010;) they exclusively discuss management of volunteers by paid staff. Rochester, Paine and Howlett (2010) acknowledge that the discussions with the sector have moved from whether we should be managing volunteers, to how best to do this, and they identify that volunteer management is a broadly middle management role.

Interestingly they note that in some volunteer-led organisations, management thinking is not seen as relevant and question whether this indicates an absence of management or merely a different approach which suits the organisation.

Zimmeck's 2001 model (Rochester, Paine and Howlett, 2010, p.154) compares a bureaucratic, workplace based "modern" approach with a "home grown" more collaborative approach to organisations and their management practices. Their discussion of a range of research identifies that generally larger, service-provision charities are managed on the workplace/modern model, although some like Samaritans do not. Other voluntary organisations may also therefore not fit with previous research results. Much of their research also identifies effective volunteer management as being related to the recruitment, selection, training and supervision of volunteers, but does not consider how such management and leadership skills can be developed within the volunteers themselves. More recent research does consider how leaders and leadership in the sector is, or could be, developed but do also note that there is still a paucity of data on this (Terry, Rees and Jacklin-Jarvis, 2020; Khan, 2020; Jacklin-Jarvis and Rees, 2022; Mumbi and Obembe, 2022; Ivanovska Hadjievaska, Johansson and Altermark, 2023).

3.2.8 Section Conclusion

This section has considered a range of literature relating to leadership and management. Although a full review of this huge body of work is impossible to achieve, a summary of the key theories in the field has been provided with a detailed focus on those theories which are most likely to fit within the voluntary sector. Whilst some of the sources cited here are based on research and practice in the voluntary

sector, a significant proportion of them focus on theory as applied to for-profit organisations. Some consider public sector organisations but as noted elsewhere in this chapter, there is a dearth of reference to leadership and management practice in the voluntary sector in mainstream texts. This lack of research has not gone unnoticed, with Terry, Rees and Jacklin-Jarvis (2020) and others commenting on this.

Where there is a focus on volunteer leaders in the literature, it tends to focus on those at senior leadership level (Ivanovska Hadjievaska, Johansson and Altermark, 2023) rather than at the middle management equivalent level identified by Rochester, Paine and Howlett (2010), who are often involved in a combination of leadership and management tasks.

Management theory has its roots in the industrial revolution but many of the early theories have been superseded by leadership approaches in the workplace. That said, the terms are both defined differently and used interchangeably, making a discussion about one or the other challenging for this researcher. Hence the decision to align with broadly with those authors who see them as two necessary and complementary practices (Yukl and Lepsinger, 2005; Pointon, 2010; Harrison, 2017). Most traditional leadership theories such as trait and behavioural theories focus on the leader and their attributes (Benmira and Agboola, 2021) whilst later theories moved to consider how the leader gets the followers to do what the leader wants or needs them to do, such as transactional and transformational (Buchanan and Huczynski, 2019, Benmira and Agboola, 2021). The most recent theories have a stronger focus on how leaders build relationships with followers and can bring them along, so a more relational and less power-based approach (Gill, 2011; Buchanan and Huczynski, 2019; Bratton, 2023a; Lindsay, 2023) and it is these which are the focus of leadership research in the voluntary sector, such as shared/collaborative/distributed leadership (Terry, Rees and Jacklin-Jarvis, 2020; Jacklin-Jarvis and Rees, 2022; Mumbi and Obembe, 2022; Ivanovska Hadjievaska, Johansson and Altermark, 2023) and servant leadership (Erdurmazli, 2019; Ngah, Abdullah, Mohd Suki, 2021).

What is apparent from the literature relating to these theories is that whilst some authors (Goksoy, 2016) see approaches like shared and distributed leadership as

different, most authors tend to use the terms interchangeably to cover leadership that is relational, interdependent, collective, ethical and sustainable; leadership that breeds behaviours such as communications and building trust. These approaches work in complex organisations where the skills required to lead are unlikely to be found in one individual, encouraging followership and providing opportunities for those not in formal positions of authority to undertake leadership tasks (Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022; Ivanovska Hadjievska, Johansson and Altermark, 2023). These leadership approaches are increasingly being adopted in the voluntary sector according to Ivanovska Hadjievska, Johansson and Altermark (2023), although there are criticisms that it is vague and covers a range of individual approaches (Iszatt-White and Saunders, 2017).

There appears to be less uptake of – or perhaps less research on – the uses of servant leadership in the sector, although the concept of the leader serving the needs of the volunteers and organisation is one which resonates with values and motivations within the sector (Greenleaf and Spears, 2002; Erdurmazli, 2019) and as with shared/distributed leadership it empowers others to develop skills, be more engaged and take up leadership tasks (Terry, Rees and Jacklin-Jarvis, 2020; Aboromadan *et al*, 2022; Ngah, Abdullah and Mohd Suki, 2022).

Situational leadership and LMX, although older theories, are relevant as although they seem to be little-researched in the voluntary sector, they are strongly relational and consider the relationship between leader and follower, in the case of LMX as a dyadic 1:1 relationship (Iszatt-White and Saunders, 2017; Bratton, 2023b).

Situational leadership's requirement that the leader adapt their behaviour to meet the needs of the followers and how the leader motivates and engages followers has links to both transactional and transformational leadership, but there are criticisms related to the volume of variables and the inability to link these to outcomes (Robbins, Judge and Campbell, 2017).

The application of leadership and management in volunteering is unclear, potentially due to lack of research in the area. There is a tendency to apply HRM practices to managing volunteers, as one would with managing paid staff (Kolar, Skilton and Judge, 2016; Nesbit *et al*, 2016; Studer, 2016; Einolf, 2018), but this can be seen as problematic since the psychological contract is different for volunteers (Liao-Troth,

2005; Erdurmazli, 2019) and volunteers are often put off by a more professional approach to their management (Rosenfeld and Wilson, 1999; Kreutzer and Jäger, 2011; Mumbi and Obembe, 2022). However, most of the research here is related to staff managing volunteers, not volunteers managing each other.

3.3 Leadership and Management Development

This section will consider how we address LMD, particularly in relation to the leadership and management theories discussed in the previous section and applicable to the voluntary sector and volunteer leadership and management specifically.

3.3.1 Leadership and Management – The Link to Leadership and Management Development

Leadership and Management have already been identified as terms which are used to mean both discrete activities and also used interchangeably to mean the same thing. Defining LMD is likely therefore to be as contentious. The relationship between LM theories and approaches to LMD is supported by Caxton and Gold (2013) who also note that the lack of clarity in defining both leadership and management makes defining effective LMD even more challenging. Regardless of the challenges and lack of clarity, there is a need for LMD to be undertaken in line with organisational strategy and objectives (Caxton and Gold, 2013) and for HRD to be aligned to and justified in terms of business relevance (Perkins, 2016). McGuire (2014) notes the conflation of management development with leadership development, but clearly states his view that they are different. Armstrong (2016) concurs although acknowledges they are closely related. He also asks if the move away from management development to focus on leadership development reflects an assumption that the former are easier to acquire in other ways.

Claxton and Gold (2013) take an opposing stance, echoing the view in Buchanan and Huczynski (2019) that the terms are used interchangeably and mean different things to different people. They differentiate between how LMD might be approached in different types of organisation and Perkins (2016) considers this in relation to

processes used in large organisations compared to SMEs (Small and Medium Enterprises). McGuire (2014) acknowledges the need for leadership to be carried out within a context and provides a summary of key leadership theories and the implications of these in relation to the development of the pre-requisite skills, as does Page-Tickell (2017). Stewart (2009) also acknowledges the difference between the two, and rather than taking a definitive view, he suggests that it is an excellent example of the confusion surrounding management development. This is exacerbated by the lack of consistent definition of the terms and how it is approached.

In a postmodern organisational environment, leadership has superseded management as the differentiator for organisations (Iszatt-White and Saunders, 2017) so the development of leadership skills has become a significant generator of income, although as they note, some researchers question the efficacy of leadership development programmes whilst others see it as critical for their organisational success. Whilst those business-based texts which discuss LMD consider it an important element to support organisational success, in the voluntary sector, particularly at levels below Trustee Board, the emphasis is on explaining what effective management and leadership looks like rather than providing structured development (Stedman, 2011; Nesbit *et al*, 2016) and Alizadeh *et al* (2021) report on the dearth of research into how LM skills are developed in VVMs. For others, developing these skills in the voluntary sector is seen as a useful adjunct to paid career development “Organizations with voluntary leadership can be viewed as a managerial skill incubator for use within the employees' full-time organization” (Gordon and Gordon, 2017); a view shared by Palanski, Hammond and Khazanchi (2022). For individuals to take skill learnt through volunteering to support their personal career development is one thing and ties into the increased use of volunteering to help get employment (Gee, 2023a). For profit-making businesses to actively use the often limited financial and human resources of charities and other non-profit organisations is quite different and something this author would see as an unethical approach to developing a leadership and management pipeline. Where a corporation wants to benefit from those leadership and management approaches which are effective in voluntary organisation, then a more ethical approach would be to partner with them so they can gain some reciprocal benefit. Palanski, Hammond

and Khazanchi's (2022) view does link to a wider discussion about career and work, with the former being linked to linear progression and the latter to paid roles (Gee, 2023b) whereas volunteering can also be described as work within a wider social context, albeit unpaid.

It is clear to see that there are a range of views on the role and importance of LMD within the voluntary sector, just as there are within the for-profit sector.

Barends *et al* (2023) use the terms leadership and management interchangeably and they provide evidence that little has changed in 20 years in terms of the efficacy of LMD. This may be because the LMD approaches used today are still based on developing the good leadership traits linked to behavioural theories as outlined in earlier research (Iszatt-White and Saunders, 2017). There is evidence of more effective LMD in public organisations but there is no mention of voluntary or third sector in Barends *et al*'s (2023) research. The first step to effective LMD is to have a strategy and to define what is meant by the terms leadership and management within the specific organisation (Iszatt-White and Saunders, 2017; Page-Tickell, 2017). This should lead to further questions about organisational culture, the most effective approaches and appropriate evaluation.

Gill (2011) cites research into genetic predispositions to leadership and notes that this points to both an inherited element and an environmental element to leadership ability. This leads to the question of not whether leadership skills can be developed, but the level to which this can happen. Rajan (2000) and Owen (2000) in Gill (p.324) both argue that leadership cannot be taught, although where leadership skills exist in an individual, these can be developed. This view links loosely to the concept of romance of leadership where the success or failure of an organisation is overly attributed to the leader. It also fosters a culture where being a leader has a "mysterious and elusive status" (Collinson, Smolovic-Jones and Grint, 2018, p.1627) which in turn supports the view that leadership cannot be taught. In contrast Bottger and Barsoux (2010 in Gill, p.324) challenge the usefulness of the question and state that the issue is how much an individual is prepared to do to achieve good leadership. In third sector organisations, the moral accountability and need for ethical leadership is also key (Duncan and Schoor, 2015) although there is no suggestion made for how this could be identified or developed in potential leaders.

Fundamentally this shows that the issue of LMD is as contentious as the definitions of leadership and management themselves.

3.3.2 What Are We Developing?

The discourse on leadership is often framed in terms of a deficit view (Terry, Rees and Jacklin-Jarvis, 2020) whereby the assumption is that there is a lack of good leadership. This view is common in wider business as well as the voluntary sector (Page-Tickell, 2017; CMI, 2023). It is further supported by the fact that as many as 82% of managers are what is termed “accidental managers” having had no training at all, where they are not promoted for their ability and performance but reasons such as internal profile. Untrained managers are often either less effective or ineffective and this results in issues such as high staff turnover, lower motivation, toxic culture and lower profitability (CMI, 2023). The role of line/middle management level leaders and managers is critical to organisational success, managing both day to day operations as well as implementing strategies, supporting employees and involvement in change (Bosley and Gifford, 2023). Leadership programmes can make a significant difference to the skills required for the role and evidence from Bosley and Gifford’s (*ibid*) research shows that providing support to those with lower skills and less experience will deliver better returns, further supporting the concerns around accidental managers. It can be seen that there is a strong argument for developing skills in leaders/managers.

In common with others already cited in this chapter, Jacklin-Jarvis *et al* (2022) and Watt, Boak and Gold (2023) also identify that leadership does not just reside in those in positions of authority but is also found distributed across the organisation and consequently the focus should be on developing both the individual and a more collective approach. Developing individuals to be able to complete tasks and build relationships is important but organisational context such as size will influence whether the term leader is used and if development opportunities are offered. For example leadership development is found infrequently in SMEs compared to in large organisations and Nesbit *et al* (2016) note that leadership development is rarely provided for volunteer leaders. It is not unreasonable to assume that the provision of LMD within charities will reflect this, with even less available in smaller charities.

This differentiation is supported by Iszatt-White and Saunders (2017) who consider how individual leaders can improve skills and self-awareness and they outline three main areas of focus – cognitive, socio-emotional and behavioural skills. These in combination provide the ability to deal effectively with complex issues. Cognitive skills focus on critical thinking and problem solving; they suggest because we think these can be developed through training. Socio-emotional or interpersonal skills focus on communication, understanding and mentoring; although they do not make any connection here, these do link clearly to a more relational leadership approach (Pielstick, 2000; Posner, 2015; Nesbit *et al*, 2016). Behavioural skills are about the impact of the leader on others and is often linked to transactional leadership attributes. Carroll (2015) identifies three areas for learning within leadership – a mindset, an identity and practice, similar to the areas outlined above. Additionally, she provides specific definitions for learning i.e. acquiring knowledge and skills and development i.e. gradual growth and change. The learning element can be provided by experiences like formal education and training or experiences, whilst the development comes through reflection and critical reflexivity. Developing these in combination should lead to developing attributes such as trust and openness (Iszatt-White and Saunders, 2017), again behaviours which are relational (Mumbi and Obembe, 2022) but given the lack of consensus about the overall effectiveness of LMD, how successful this is could be questioned.

Although there is a focus on socio-emotional skills here, there seems to be little meaningful discussion or research into the requirement for emotional labour in leadership/management or the development of those skills. A 2008 paper by Humphrey, Pollack and Hawver notes that “emotional labour is an important and overlooked function performed by effective leaders”. Leadership theories do not consider the psychological effects of engaging in EL which they suggest is a critical part of effective leadership. Whilst there is research into the need for EL in education and health care, there is no mention of EL featuring in development for school leaders, who require much higher levels of EL to do their job and suffered higher levels of burnout (Maxwell and Riley, 2017). In sports psychology is also a critical requirement for EL and Hings *et al* (2020) have ascertained that this is often implicit in the taught input, with students often unable to specify the competencies required to engage in EL in their role. They identified that practical experience was

the most effective way to develop the skills and understanding, highlighting the need for experiential learning here. They also highlight that significant levels of EL can be required in doing something where you may feel less competent or confident.

Research conducted with the National Trust does highlight the specific challenges of managing volunteers and identifies EL as a critical part of the role (Greene and Ward, 2016). As a volunteer, with no financial dependence on the organisation, the usual social constraints present in a formal employment relationship do not exist. This leads to a relationship with higher emotional demands which managers need to manage. Providing them with the skills to do this would improve the quality of volunteer management and leadership.

One aspect of LMD that also does not feature large in the literature is learning taken from experience and observation of leadership in others, apart from its consideration as being part of a relational leadership approach. Research on observation as part of leadership development often focuses on how existing leaders can benefit from feedback following being observed (Earley, 2013; Earley and Bubb, 2013; Armentrout, 2017) and is often specific to sectors such as education or social work. The literature on how followers learn what leadership – good or bad – looks like through observing other leaders and receiving leadership themselves does not seem to be a focus. Laasch (2021) talks about followership and folleading but does not consider how today's leading might influence tomorrow's leaders. Kempster's (2006) paper highlights both the need for a more qualitative, critical realist approach to research in leadership learning and the challenges of identifying the tacit knowledge in the "how" of learning about leadership. He cites a wide range of authors from the late 1990s and early 2000s who note that this is an area that is in need of further exploration, but little seems to have been added to the body of work since then.

Fryling, Johnston and Hayes (2011) and Johnson (2018) agree with Kempster (*ibid*) that Bandura's work on social cognitive theory is key in relation to learning through observing others. Leadership is learnt through observation, mimicry and trial and error (Johnson, 2018). Kempster (2006) agrees and cites naturalistic and situated learning as being fundamental here. He goes further however and states that formal learning is less important than learning from lived experience as a leader, particularly influence from notable people and experiences. These influences only became apparent when leaders were questioned about their experiences, making them

reflect on how these had influenced their ongoing development as a leader e.g. by the avoidance of observed negative behaviours such as bullying and the adoption of observed positive behaviours (Kempster, 2006). Fryling, Johnston and Hayes (2011) support this view of learning from observing others and highlight that the observing does not have to be planned for it to be effective. Additionally, modelling behaviour and the consequences of the activity can have an impact, all of which would support the view that observation impacts on individual LMD. Kempster (2006) notes that the specific elements of the experiences and their impact can be hard to identify, and Fryling Johnston and Hayes (2011) add that difficulties in measuring the impact makes this a controversial theory to apply.

As well as differentiating between leader and leadership development, Iszatt-White and Saunders (2017) provide consideration of how organisational leadership might sit alongside individual leader development. To develop organisational leadership capability requires a common definition and set of behaviours. They note some authors take the view that leadership and the associated skills “occurs in the heads of individuals or is captured in the systems and processes of an organisation” (p.285) whilst others consider the effect of wider internal and external influences. From this they assert that effective LMD needs to include time and space for willing and engaged learners to develop their understanding of leadership in their specific context through challenging discussion, both for the individual leader and a wider organisational understanding. This approach is supported in the voluntary sector by Jacklin-Jarvis *et al* (2022). Using gap analysis, taking a traditional Learning Needs Analysis (LNA) approach allows LMD to be specific to the organisational needs, however this presupposes there is a clear idea of what leadership is and what skills are needed to be a leader within the organisation. It is important to acknowledge however that organisational culture and structures can conflict with broader leadership ideals (Iszatt-White and Saunders, 2017).

Leadership approaches are subject to change and by association LMD needs to reflect this (Watt, Boak and Gold, 2023). An example is the changes driven by Covid-19 around what are seen as key leadership skills; during the pandemic leaders needed to be able to lead teams remotely and a higher importance was placed on considering individuals' emotional wellbeing. In turn this is an indicator of how changes over the next decade could influence what are seen as key

capabilities. They suggest tools like competency frameworks can help identify and develop measurable behaviours although there are a number of criticisms ranged against them. They can be too narrow; lack sufficient focus on using the right behaviour at the right time and lack evidence that they are the right competencies. Additionally they can have so many competencies within the framework that one person would be unlikely to achieve this; this issue in particular is one which shared/distributed leadership is ideally placed to address (Kapoor, Noida and Agnihotri, 2015; Goksoy, 2016). This connection is not made by Watt, Boak and Gold (2023) and this could be connected to the view that leadership theory development and by association, LMD, is linked to competitive and economic drivers Bratton (2023b).

Knowledge about leadership as well as the development of it, is invested with power, a view which supports the view of the power dynamic within leader/follower relationship in business (Carroll, 2015). Given that the leader/follower relationship within a volunteer setting has to rely on other dynamics (Jäger, Kreutzer and Beyes, 2009; Posner, 2015) it could be argued that this is either absent or reduced in this environment. If our views of leadership are influenced by wider societal truths and personal experience of being led and seeing leadership around us, a view which is supported by the critical realist perspective of this thesis, then what we learn, or choose to learn, and what we are provided with as learning and development in relation to leadership is always contextual. It is clear then that the context – business or the voluntary sector – in which we acquire the knowledge and skills, will influence how we then apply them. This in turn adds to the argument present in this thesis that leadership skills developed in business may not always be appropriate for the voluntary sector.

3.3.3 The Link Between Leadership and Management Theory and Leadership and Management Development

Regardless of whether leadership development is seen as different from or the same as management development, LMD research and academic writing is based on business perspectives, since the LM theories already discussed are based on business research and historically predominantly from the US. Hodges and

Howieson (2017) identify that finding a European and sector-specific context is particularly challenging in relation to leadership theory. They also identify lack of leadership as one of the top five issues facing the third sector and it is among the top ten skills gaps in the sector, again highlighting a deficit view (Terry, Rees and Jacklin-Jarvis, 2020)

Historically, LMD design has been based on developing those skills and behaviours identified in trait and style leadership and management theories (Iszatt-White and Saunders, 2017) and this provides evidence that leadership can be both taught and learned (Page-Tickell, 2017). That said, providing development activities is much more challenging for some theories than for others. For example, identifying the required traits and how to measure them in the absence of specific weightings then designing, delivering and evaluating development activities and their effectiveness is considerably more challenging than undertaking this process for behaviours which are more easily measured through a competency-based approach. This may explain the move in more recent times to the application of competency frameworks for LMD (Watt, Boak and Gold, 2023). Claxton and Gold (2013, p.268) provide a different approach by using Pedler, Burgoyne and Boydell's 2004 model of three domains for leadership development and applying this to LMD. The model they discuss is based on challenges, context and characteristics, and additionally considers the use of qualities and competencies. They note that whilst LMD can be formal, planned, structured, visible and measurable it can also be the opposite, making a common view difficult to achieve.

When considering other theories and how these skills might be developed, the following all have relationships and the skills to build them in common, namely human relations theory, distributed and shared leadership, contingency and situational approaches, leader-member exchange (LMX) and servant leadership.

Human Relations Theory is dependent on the relationship between the leaders and employees (Markert, 2008) and this introduces an element of psychology into LMD (Stedman, 2011; Caxton and Gold, 2013). Distributed Leadership requires a high level of sensitivity to changing environments (Feng *et al*, 2017). Both could therefore be considered broadly as situational leadership theories, alongside contingency theories. These focus on building relationships with team members, so the learning

here is related to self-awareness, relational skills and group interaction (Page-Tickell, 2017). The ability to understand the impact of the relationship between context, leaders and followers is fundamental to effective leadership. Therefore developing leaders within this paradigm involves “training leaders to recognise, understand and diagnose the organisational environment” (McGuire, 2014 p.194); understanding the relationships between leaders and followers and focusing on an appropriate style of leadership. Although LMX theory is about one-to-one relationships specifically, learning is also related to building relationships, but with a focus on different individual perspectives and individual relationships rather than groups (Page-Tickell, 2017). De Clerck *et al* (2021) identify transformational/transactional approaches, LMX and servant leadership as most common in the voluntary sector.

There seems to be a broad agreement that developing the skills for servant leadership is possible, with commercial LMD providers such as Blanchard.com delivering courses to do just this but the specifics are harder to pin down. Amparado and Villarante (2020) provide evidence that servant leadership is motivated by the need to make relationships with others and build a better society whilst others such as McMahon (2012) see developing servant leadership in business as a partial solution to unethical business practice and notes that where large corporations promulgate servant leadership, it is as an organisation-wide ethos. Servant leadership behaviours can be developed in educational settings through engagement with social issue-related projects (Chan and So, 2017) and also by embedding it in qualifications, using approaches which focus on developing self-awareness, reflection, coaching and feedback in the style of 360-degree feedback (Kiersch and Peters, 2017). Fields, Thompson and Hawkins (2015) used reflection and application of appropriate behaviours in specific care roles but acknowledge there were challenges.

Another approach is to build leadership capacity through the use of shared leadership but educationally this is hard to achieve as many voluntary organisations still rely on traditional organisational structures and hierarchical leadership (Freund, 2017; Ivanovska Hadjievaska, Johansson and Altermark, 2023). Jacklin-Jarvis *et al*'s (2022) research into the effectiveness of a reflexive approach to LMD, whereby participants use their experiences to apply theories and concepts, working both independently and in groups, is not labelled as any particular form of leadership style

but can be seen to match with the approaches used in relational leadership development. Overall the approach taken to LMD when considering these theories is based on relationships and the importance of skills to develop the ability to build these, communicate effectively and respond appropriately to contextual clues. However these relational skills are less transferable from training to workplace when compared to general management skills (Barends *et al*, 2023) although a tailored solution based on the individual's needs and linked to clear goals will assist effective transfer.

Learning and development related to transformational and transactional leadership supports the development of an organisational understanding and personal self-awareness (Page-Tickell, 2017) and a range of authors suggest that transformational leadership is most effective in not-for-profits (Gill, 2011; Dwyer *et al*, 2013; De Clerck *et al*, 2021), a view challenged by Jäger, Kreutzer and Beyes (2009) although Ivanovska Hadjievska, Johansson and Altermark (2023) identify that it forms a significant part of LMD in the UK sector, albeit for senior leaders. Pay and financial reward in the sector are not the equivalent of those in the commercial sector, so psychological recognition and reward are critical. Transformational leadership provides these; however Gill (2011) also notes that 95% of not-for-profit leaders surveyed stated that they were unable to access appropriate learning and development. Whilst senior leaders in 2024 may have a wider range of options to develop their skills through university courses such as those researched by Ivanovska Hadjievska, Johansson and Altermark (2023), the economic impact of recession and downturn affects charity income (Smith, 2022). With half of organisations polled stating they were investing less in L&D because of economic uncertainty (Sriganthan, 2023) this situation is unlikely to be significantly improved and will doubtless have a deeper impact in charities.

Ivanovska Hadjievska, Johansson and Altermark's (2023) research outlines a mix of transformational and collaborative approaches to senior LMD in the UK, some of which takes place in Higher Education institutions which are increasingly driven by metrics related to wider employability (Gee 2017). As VVM development is not based on a premise of career progression and employability it is hard to see how LMD would be provided through formal educational routes in the same way as for those managing paid staff. Like Gill (2011), they are considering this from the

perspective of paid staff and predominantly in relation to senior managers and Chief Executives. This supports Hodges and Howieson's (2017) observation that research in third sector leadership focuses on this level of leadership (as indeed does theirs). Gill's (*ibid*) assertion regarding transformational leadership is countered by Clark and Higgs (2016) who state that in organisations where there is a high level of regulation then a more transactional style is effective. In addition they note that approaches such as distributed leadership are effective in times of change and that political influences impact the approach taken, supporting Bratton's (2023b) view. This suggests that context is the key indicator both of appropriate leadership style and consequently the type of LMD delivered. It can also be argued that appropriate LMD for those in middle management VVM roles will need to be different from that offered to senior leaders, where, as already noted, most of the research is focused.

The importance of context is further supported by Hodges and Howieson (2017) who point out the dangers of cutting and pasting aspects of for-profit leadership into the sector rather than considering the specific needs of the context. The view that there is a revival of a more leader-centric style in business (Buchanan and Huczynski, 2019; Bratton, 2023b) offers further support to their arguments as it is possible to see that how LMD is delivered in for-profit business environments does not align to the leadership needs of VVMs. The sector's needs are highlighted by the wide variety of stakeholder relationships, the nature of the problems and issues to be addressed, the need for ethical decision-making and cultural differences.

Leadership at all levels of third sector organisations is required, not just at the top (Posner, 2015; Nesbit *et al*, 2016; Freund, 2017; Einolf, 2018; Jacklin-Jarvis *et al*, 2022) and Hodges and Howieson (2017) state a framework specifically for this is critical and in need of urgent development.

Management and leadership development infers the development of a set of prescribed skills to achieve set organisational outcomes, whereas *manager* and *leader* development suggests a focus on individual learning and development (Stewart, 2009). Along with the espoused need for LMD to provide skilled leaders and managers for the current business and for the future e.g. through talent management, these different expectations provide more challenges and Gill (2011) identifies other, wider issues within the delivery of LMD. These relate to the use of potentially unsuitable "celebrity" role models and approaches such as outdoor

activities and more fundamentally challenging concerns around the combined teaching of agency theory, with its focus on self-interest and profit-maximisation; and a version of transformational leadership where they are “heroic charismatic visionaries who are well above the heads and hearts of those ordinary competent managers over whom they exercise influence and control” (Gill, 2011, p.339), a view shared by Clarke and Higgs (2010) and Hodges and Howieson (2017). This risks the production of unethical unprincipled leaders who have had little chance to consider their values, integrity and beliefs and the impact of this on their approach to leadership. One solution to this is to recognise that organisations and specifically effective leadership learning and development should consider followership more than it does (Laasch, 2021) and consider the implications of the focus on agency theory.

This view supports Hodges and Howieson (2017) who note that the US models of leadership within the third sector are focused on the individual and that the followers are viewed as passive parties in the relationship. This psychological perspective leads to a ‘top down’ leadership approach whereby leaders influence the followers’ views to achieve the necessary goals. They argue that a European context requires a more sociological perspective where the requirements of leadership change depending on the specific organisational context, processes and outcomes. There has been an increase in research into shared and distributed leadership in the sector and there is a developing view that leadership is a collective responsibility within the sector, although this is under researched (Jacklin-Jarvis and Rees, 2022). It is logical to assume that at some point this research and the changing view will impact on LMD, how it is defined, and on both its purpose and format.

Overall, this lack of provision to develop LM skills, particularly relational skills, is further highlighted by Nesbit *et al* (2016) whilst Posner’s (2015) view is that there is no clarity about what effective leadership looks like for VVM roles, all of which supports the perspective that there is insufficient research into how volunteers can and/or do manage other volunteers (Jäger, Kreutzer and Beyes, 2009), further supporting the need for a more context-specific view. Terry, Rees and Jacklin-Jarvis (2020) challenge this deficit view of leadership in the sector, but regardless of whether this is correct or not, the quality of leadership within the sector will impact on a range of stakeholders.

3.3.4 Strategic Approaches to Leadership and Management Development

Although it is often posited that LMD needs to be linked to organisational goals to be effective, this presupposes that goals and the strategy from which they come are planned, whereas the reality is that often this is an emergent process (Stewart, 2009). Hager and Brudney (2015) consider different approaches to volunteer management, specifically related to HRM practices. The Best Practice HR approach, where practices are adopted because it is expected, rather than due to any effective outcomes, is often used since it has historically been applied in for-profit environments. However they question its applicability across such a diverse sector and instead identify that some elements of a contingency approach are more useful. Nesbit *et al* (2016) also suggest that applying HR approaches is an effective approach for volunteer management, and that VMs should be trained to do so. There is a view that, within the third sector, there is a lesser relationship between management decisions and strategic goals, a view shared by Akingbola (2006, in Hager and Brudney, p.251) whilst Posner (2015) comments on the lack of clear connection between leadership effectiveness and organisational effectiveness. They conclude that a “toolbox” approach, where the choices made regarding volunteer management are taken from a range of practices and designed to meet the needs of the context in which managers are functioning is a more effective approach, providing the best outcomes. This broadly supports Stewart’s (2009) view of an emergent rather than a planned process above. Effective volunteer management results in higher net benefits i.e. where the results gained from the activity outweigh the costs and/or disadvantages. Whilst it can be seen that there is a case for ensuring that volunteers are managed effectively, who does this and how they acquire the skills to do this is still undecided.

In turn, this raises the question of how structured and formulated LMD can then meet the needs of an emergent process. A formalised approach also potentially limits or even discourages engagement in informal learning (Stewart, 2009) which is both important and widespread amongst volunteers and leadership in the sector (Fullwood and Rowley, 2021; Jacklin-Jarvis *et al*, 2022). This limiting factor may explain why so many CEOs and senior leaders feel they are unable to access what they feel is appropriate L&D (Gill, 2011).

Research showed that leadership development strategies were rare; interventions were piecemeal; participants came from a small number of groups e.g. newly appointed managers or high-potential staff; learning was generic rather than specific to the needs of the organisation. In spite of this, additional research showed the majority believed a lack of leadership capability would negatively impact on their organisations yet they were not engaged in either providing comprehensive, strategically focused leadership development for their organisations or in undertaking personal development in this area (Gill, 2011). The impact of accidental managers is significant in business (CMI, 2023) with 82% of managers having had no formal LMD before taking up the role and a third of current leaders/managers, including a quarter of senior leaders/managers, having undertaken no formal LMD either. As formally trained leaders/managers are more effective, and being more effective supports improved retention, performance and achievement of organisational goals, it is unsurprising that ineffective managers drive higher staff dissatisfaction, lower motivation and increase the likelihood of staff leaving.

Although there is research showing that poor LM practices impact aspects of volunteering such as motivation e.g. Posner (2015) and Erdurmazli (2019), volunteer turnover and the reasons for it are not well understood (Holtrop *et al*, 2024). They identify poor leadership as one of seven reasons volunteers leave, showing a direct correlation with the CMI research. The Civil Society and UK Fundraising both reported that volunteer recruitment is an issue, with 63% of small charities worried (Whitehead, 2023) and as many as four in ten charities not having enough volunteers (May, 2023), whilst Oliver (2024) comments that many organisations struggle to recruit Gen Z volunteers in particular. Given these issues, volunteer retention is critical and providing appropriate, timely LMD is a key contributor to achieving this goal.

Where there is effective LMD, this is linked to strategy, leadership philosophy and LMD goals as well as the area where it is expected to have an impact (Clarke and Higgs, 2016). Their third sector example identified these as organisational performance; distributed leadership; improving the service, managing change and volunteer engagement. This level of detail further supports Hodges and Howieson's (2017) view that context is critical when identifying the skills needed. Overall in the UK investment in leadership development is very low compared with other European

countries; the focus is often on operational issues rather than wider leadership concerns and where development is present there is a lack of clarity on who should attend and how best to support learning transfer (Gill, 2011). In 2017, Hodges and Howieson identify similar findings and concerns and Freund (2015) and De Clerck *et al* (2021) note that traditional, professional management structures and hierarchical leadership from business is expected and evident in volunteer LMD. Nesbit *et al* (2016) note the lack of time invested in VVM LMD; Fullwood and Rowley (2021) comment on the lack of research into volunteer development generally, whilst Palanski, Hammond and Khazanchi (2022) focus on how skills acquired – often informally – in volunteering transfer well to the workplace. This is clear evidence that there has been little change and still no clear direction in LMD within the sector.

A review of Burgoyne's typology which links LMD and organisational strategy shows that the more structured approaches, where LMD is designed to deliver existing strategy goals and support future strategy development, are contingent on type and size of organisation e.g. large organisations (public and private sector) and the level of support from top management. Consequently the majority of organisations provide LMD in one of three ways - a haphazard, reactive way; to meet a narrow, previously identified set of needs; with a cohesive and structured approach to LMD (Stewart, 2009; Mumford and Gold, 2004). The main criticism of this is that it assumes that all LMD is formalised and structured, thus limiting any opportunity for informal or unplanned learning. Mumford and Gold (2004) also present a typology for LMD, theirs has only 3 levels and views learning as accidental, opportunistic or planned. Stewart (2009) suggests that this allows a more holistic approach to LMD since the accidental learning, although happening in the real work environment, may not be sufficient to ensure full learning whilst the planned learning may not transfer completely, or quickly, from the classroom to the workplace. Opportunistic learning can potentially mitigate these disadvantages and also moves away from the forced (and potentially unhelpful, according to Stewart) forced choice of either formal or informal learning, instead acknowledging the benefit of both. The need for both types of learning is supported by a number of management learning theories, namely Knowles' theory of Andragogy (Knowles, Holton and Swanson, 2005); Argyris' single and double loop learning and Kolb's experiential learning (Mumford and Gold, 2004). Informal learning is also seen as significant within volunteer L&D (Mündel and

Schugurensky, 2008; Fullwood and Rowley, 2021), with Palanski, Hammond and Khazanchi (2022) highlighting how VVMs often use self-directed learning which is often informal.

These criticisms would seem to highlight that many existing leadership programmes are not only considered unfit for business leaders but would not be useful or meaningful in the voluntary sector and particularly for volunteers leading volunteers since the areas of focus are not always relevant in the third sector.

Connors (2012) pulls together a range of views on volunteer management. In this, Safrit and Schmiesing (2012) provide an overview of a range of models used to manage volunteers but these are predominantly concerned with management of processes such as recruitment and training, rather than management (or leadership) of the volunteers themselves. De Clerck *et al* (2021) reinforce the expectation of professional management approaches in LMD in the voluntary sector, whilst Einolf (2018) acknowledges the adoption of a range of HRM practices. Where Safrit and Schmiesing (2012) do consider management or leadership of volunteers, they do so specifically from the perspective of paid staff managing the volunteers. Posner (2015) notes that this focus on paid staff is common within voluntary sector research, as evidenced for example by Jäger, Kreutzer and Beyes (2009), Mumbi and Obembe (2022) and Ivanovska Hadjievaska, Johansson and Altermark (2023). Where volunteer training not related to senior leaders is considered, it is often only considered in relation to upskilling volunteers in key skills related to their 'functional' volunteering role, and no mention is made of training those to manage them, presumably because those managing them are staff and therefore trained differently (Hood, 2012). Relations between volunteers and staff are viewed from the perspective of staff needing to manage the relationship and apart from senior groups of volunteers such as governance groups, the focus is on staff, not volunteers, managing volunteers (Macduff, 2012).

There is evidence of LMD being provided for leaders and managers at different levels in the voluntary sector at institutions such as the Centre for Voluntary Sector Leadership at Open University and the Centre for Charity Effectiveness at Bayes Business School, City, University of London and through umbrella membership organisations such as the Association of Volunteer Managers (AVM), ACEVO

(Association of Chief Executives of Voluntary Organisations) and NCVO (National Council for Voluntary Organisations). Many of these and those highlighted by Ivanovska Hadjievska, Johansson and Altermark (2023) are for senior leaders in paid roles and although organisation such as AVM do attract VVMs, they are in the minority here and there is little obvious generic provision for VVMs. This potentially supports the views of Nesbit *et al* (2016) about how VVMs are undervalued, and the lack of training and development provided reflects this. It will also have an impact on the ability to build capacity in wider volunteer leadership (Freund, 2017). This links back to the issues related to volunteer recruitment and retention mentioned above, and further reinforces the need for meaningful, appropriate, relevant LMD for VVMs and leaders.

3.3.5 The Best Approach to Developing Skills

HR practitioners are often responsible for LMD (Dai and Tymon, 2016). They note potential issues which prevent effective leadership; identify the quality of learning needs analysis and evaluation as being key; discuss the importance of developing social capital and whether a focus on training or development is more useful. Whilst Nesbit *et al* (2016), Studer (2016) and Einolf (2018) note the application of a range of traditional HR approaches within volunteer management, Warner, Newland and Green (2011) point out that as volunteering is considered part of an individual's leisure activity, managing volunteers can also be viewed from a consumer behaviour perspective rather than from the traditional human resource management perspective. This provides the opportunity to take a different approach. Motivation, and meeting volunteers' motivational needs is often seen as a basis for developing strategies for managing volunteers, often through management and leadership approaches (Erdurmazli, 2019; De Clerck *et al*, 2021). However, satisfaction and organisational commitment are also strong drivers. This influences how (paid) volunteer managers manage volunteers since "paid staff tend to frame volunteer experiences in instrumental terms, seeing volunteers as unpaid staff. Volunteers, on the other hand, frame volunteering as a leisure experience." (Warner, Newland and Green, 2011, p.402). Their research uses TQM (Total Quality Management) tools to consider consumer motivations and suggests that developing volunteer management

systems to focus on these could be an effective way of managing volunteers rather than a traditional HRM view.

In the more usual HRM approach to managing volunteers, a variety of approaches are used within LMD, often based on the skills identified through LM models and frameworks (Caxton and Gold, 2013). Perkins' (2016) observation about the need for LMD for SMEs to be business relevant is supported by Coetzer *et al* (2011) who found that a variety of approaches to LMD planned activities such as formal training, mentoring, reading, learning from discussion with others, and learning from mistakes were most frequently engaged in. This would support the views that coaching and/or mentoring are often seen as relevant and helpful interventions in LMD and executive coaching can be used both for the individual leader and the leadership team (Garvey, Stokes and Megginson, 2018). Connor and Pokora (2017) concur and further cite the use of leaders in organisations to provide coaching for subordinates. Coetzer *et al* (2011) noted that although there had been little engagement in other more critically reflective approaches such as Action Learning and use of feedback, these were identified as particularly useful learning activities, a view supported by McGuire (2014). Allen and Hartman (2008) consider the use of blended or e-learning in LMD and Smith and Keaveney (2017) note the challenge of providing meaningful LMD online for senior leaders. Face to face leadership training for St John Ambulance volunteers was effective in terms of both engagement and outcomes (Pollitt, 2006). A variety of approaches is therefore applied within LMD. Finally, the link between LMD, effective leadership and the learning organisation is also identified by McGuire (2014).

3.3.6 Specific Learning and Training Interventions

If volunteering can be considered a leisure activity it can be argued that volunteering is not seen as an educational activity, so learning is not expected to take place (Mündel and Schugurensky, 2008) and as noted above this allows a different approach to be considered.

A range of ways to consider specific ways of providing LMD are considered by different authors. Watt, Boak and Gold (2023) identify two ways of developing leaders, one using a prescribed approach which identifies one right way of leading,

whilst the other is an experiential learning approach. They consider how these two can be used to provide a complementary learning environment where the unplanned and informal learning supports the planned formal learning and vice versa and identify learning methods to support this. Henriksen and Borgesen (2016) and Page-Tickell (2017) also highlight the need for a balance of formal and informal development, with informal development being more self-directed and workplace related, agreeing with Mündel and Schugurensky (2008). Iszatt-White and Saunders (2017) reinforce the need for good LMD to contain knowledge and theory as well as make links between this and a practical application, assisted by sound, ethical decision-making, a consideration which is mentioned more often in business literature but is fundamental to those leading volunteers (Posner, 2015). Gill (2011) also considers LMD from an individual view, identifying specific needs such as individual self-awareness relating to behaviours as well as preferences in communication and learning. To be effective, LMD needs to focus on how leadership works within organisations rather than on the leaders themselves. The rise of technology in areas where traditionally the activities would have been done face to face has added an extra dimension in the form of a need for digital leadership skills in this new environment. This presents new challenges, and organisations with an open, learning culture will deal more effectively with these (Watt, Boak and Gold, 2023).

There are also a range of discourses which can be used to support LMD interventions (Carroll, 2015). A functionalist discourse supports the development of skills through formalised activities such as competencies and coaching/mentoring, assuming that those who have developed the requisite skills will be better leaders. This overlooks other views on the need for informal learning (Page-Tickell, 2021; Watt, Boak and Gold, 2023). Two strong criticisms of this approach are the focus on measuring the return on investment and the fact it ignores any interrelationship between the individual and wider organisational performance and issues. This is the only discourse discussed by Carroll (*ibid*) which provides examples of how the LMD might be delivered, the others focus on how they might influence delivery in a broad context.

An interpretive discourse sees leadership as relational and contextual, so learning and development would focus on individual definitions and views of leadership and

how these fit within the wider collective over time. Here, the approach would be to develop the visibility of behaviours so that these can be changed. The timeframe and intangible nature of this approach can make it seem overwhelming. This would seem to support the argument that for one person to attempt to demonstrate all the skills and behaviours needed can lead to the need for a heroic leader, particularly in complex organisations and that a shared leadership approach is one way of managing this challenge (Terry, Rees and Jacklin-Jarvis, 2020). As Freund (2017) observes, this requires capacity building, which can be a challenge with volunteers. In contrast, dialogic discourse acknowledges the messiness and conflict involved in leadership alongside the expectations set by the organisation and LMD providers supported by language, activities and other cultural signs. Critical discourse asserts that leadership development reinforces the status quo rather than driving change in areas such as ethics and diversity. This leads to wider questions about e.g. how we identify who should/should not be developed and what kind of leadership should/should not be developed (Carroll, 2015). Within the voluntary sector literature there is a strong recognition that opportunities to develop leadership skills needs to be more inclusive and support wider talent development (Jacklin-Jarvis *et al*, 2022; Mumbi and Obembe, 2022).

When considering any form of learning and development, the stages of the training cycle i.e. identifying needs, design, delivery, and evaluation (Beevers, Rea and Hayden, 2020) are often cited as being a critical consideration (Dai and Tymon, 2016). Gill (2011) states that leadership skills and potential are usually identified through diagnostic questionnaires and assessment centres although the validity of these questionnaires is often questioned and a recent study showed many lack rigour (Bosley and Gifford, 2023). However it should be noted that there is considerably less literature on learning needs analysis and evaluation than on the design and delivery aspects.

Bosley and Gifford (2023) comment on the need for robust needs analysis, which can be used to motivate and engage participants. All content should be evidence-based and time allowed to practice the learning, either in the learning environment or in the workplace, which requires a safe environment for learning to take place during and after a learning event. Good LMD has a focus on both general management and interpersonal skills and this should use a range of approaches and be repeated

or delivered over a period of time to embed learning. Barends *et al* (2023) go further and state that leadership development should be “strongly and systematically integrated” (p.11) into the workplace.

Competency frameworks are frequently used to identify the knowledge, skills and behaviours required by leaders as either part of a wider LNA (learning needs analysis) or as a tool for LNA in their own right. They are used in the private sector and increasingly in the public sector and most often aligned to organisational objectives (Gill, 2011). Page-Tickell (2017) advocates for the use of competency frameworks to identify needs and development centres to support the acquisition of necessary skills. Competency frameworks can be seen as overly complicated; as setting a minimum standard, rather than an aspirational level and as they are often based on best-practice approaches, can be seen as past or present focused, rather than future focused. Where competencies are focused on what is done, on measurable attributes and on providing these in the form of training only, Gill (2011) argues this will never be effective. Added to this is the consideration of different attributes i.e. cognitive ability, intrapersonal strengths, interpersonal skills, values and beliefs and overall a recognition that a skilled and competent leader is developed through ongoing, longer-term education, learning and development. Again this highlights the risk of expecting an individual to be able to demonstrate a potentially unachievable range of skills and behaviours.

Clarke and Higgs' (2010) research showed that in the third sector, the LMD undertaken was flexible in its approach and used techniques such as coaching and action learning. This can be linked to the use of a distributed leadership model, where recognising the value of volunteers' experience and input is an important part of engaging with them and thus retaining them. Walton (1999) refers to non-employees being a specific stakeholder group and includes volunteers within this. He advocates having a specific strategy and content for developing these non-employees, however he also considers them a group who “operate outside the boundaries of an organisation” (Walton, 1999 p.264) rather than as an internal stakeholder. He acknowledges the need for developing skills within volunteers, but only for front line activities. That said, his checklist for providing learning for non-employees still has relevance insofar as it is based around a thorough needs analysis at organisational and group level and includes consideration of budgets and

future needs. Anderson and Baroody (1992) comment that (paid staff) managers who manage highly qualified and experienced fund-raising volunteers must understand “the unique aspects of managing volunteers” but apart from the lack of financial incentives available to motivate, fail to elaborate on how these are different.

Whilst Ivanovska Hadjievska, Johansson and Altermark (2023) discuss the formal senior LMD offered in the UK, it is not clear how large a proportion is delivered in a more traditional classroom environment, although some of the programmes are in this format. This reality is in stark contrast to the research evidence about which approaches are felt to be most beneficial. Iszatt-White and Saunders (2017) comment that experiential learning based in the workplace and supported by action learning, coaching and the application of mindfulness may be more effective than off-site LMD and Watt, Boak and Gold (2023) also highlight unplanned, work-based experiential learning and coaching and mentoring as effective. Gill (2011) cites coaching, learning from peers, experience and skills training as being those most preferred by CEOs and adds that peer networking and self-development also play an important role in leadership development.

Stewart (2009) considers both formal and informal LMD. Formal approaches include peer learning in the form of action learning, experience and skills training through internal and external courses and seminars, all of which are mentioned by Gill (2011). Other activities such as qualifications, performance reviews and formal career management are offered by both Stewart (*ibid*) and Mumford and Gold (2004) who also provide an analysis of how effective the different methods can be on an individual’s ability to learn from that activity. Informal activities considered are learning as a result of changes in the job role or content. On-the-job, off-the-job and other learning are considered from the perspective of the likelihood they will encourage learning and whether they are linked to cognitive, affective, interpersonal or self-knowledge related learning. The most effective approaches show a strong correlation with the methods identified by Gill (2011) and Stewart (2009) as being frequently used for LMD. Iszatt-White and Saunders (2017) consider approaches which allow participants the opportunity to discuss leadership and its associated skills in relation to their specific context.

The terms coaching and mentoring are often used interchangeably in leadership development (Iszatt-White and Saunders, 2017) and they provide a range of definitions which highlight key differences such as whether the relationship is directive, providing advice and solutions or non-directive and reliant on helping the individual find their own answers. Coaching has its roots in therapeutic models, often reflects the work of Carl Rogers and as it is based on a one-to-one relationship, making a more relational approach. They comment that the coachee needs to be ready and willing to engage in it but it could also be argued that a mentee also needs this commitment. Mentoring they identify as an internal activity between someone with more experience and potentially more power, and someone inexperienced or new to their role. Coetzer *et al* (2016) support the views that coaching and/or mentoring are often seen as relevant and helpful interventions in LMD and executive coaching can be used both for the individual leader and the leadership team (Garvey, Stokes and Megginson, 2018). Page-Tickell (2017) and Connor and Pokora (2017) concur and the latter further cite the use of leaders in organisations to provide coaching for subordinates.

Action learning is seen as an effective tool in LMD (Watt, Boak and Gold, 2023) also identify action learning as an effective tool, but they link it to collective leadership practices such as team learning. It allows time for reflection, is based on specific issues relevant to the individual and can be done with or without a facilitator (Iszatt-White and Saunders, 2017) and is a particularly useful learning activity (McGuire, 2014; Coetzer *et al*, 2016; Page-Tickell, 2017). Interestingly, while Iszatt-White and Saunders (2017) comment on the increased use of action learning in LMD, Coetzer *et al (ibid)* note the lack of engagement in critically reflective approaches such as Action Learning and use of feedback.

Reflection, both on action and in action, as outlined by Schoen (Iszatt-White and Saunders, 2017) is a skill that effective leaders need and formal structured review activities to develop this can be built into formal LMD programmes. Watt Boak and Gold (2023) also discuss the importance of reflection and add critical thinking to the list. Being able to transfer learning from a formal event back to the workplace can be problematic, as organisational culture may not support and may even refute the new learning and behaviours. Effective transfer requires the opportunity to apply the learning, supported by peers and supervisors and with regular reviews.

Learning from experience is seen as critical since it identifies those who, when faced with a setback, will try again, but there are challenges with this since it takes time and the willingness to reflect on what has occurred, acknowledging shortcomings and strengths and then learning from it (Gill, 2011); this not only aligns with Mumford's Typology (Mumford and Gold, 2004) but also with Knowles' theory of Andragogy (Knowles, Holton and Swanson, 2005) and Argyris' single and double loop learning and Kolb's experiential learning (Mumford and Gold, 2004). All of these models acknowledge that time to reflect and apply the learning is a critical aspect of the process, but Gill (2011) notes that organisationally there can be pressure to learn more quickly, within a structured framework, and barriers to learning and implementing the learning are not understood and addressed, all of which impedes effective LMD. He also states effective LMD needs to be driven from the top, structured in a way which supports the business and reflect the organisational culture; it needs to reflect the context in which it is taking place. Clarke and Higgs (2010) take an alternative view, considering that where LMD is specifically planned and implemented, it provides the skills required to respond to changing external conditions. This view is supported by Iszatt-White and Saunders (2017) who state that leaders themselves identify that a range of experiences, often challenging ones, are those that deliver the most learning. Often the changes wrought through learning this way are not evident until the individual reflects on their development. Hings *et al* (2020) pinpoint experiential learning to support development of skills related to effective emotional labour, highlighted as an important leadership skill by Humphrey, Pollack and Hawver (2008). Additionally, Kolb's learning cycle evidences the process undertaken with experiential learning and highlights the importance of self-awareness in developing a range of skills, thus further supporting the importance of this approach in LMD.

Other approaches which are mentioned by various authors are job-shadowing and appreciative enquiry, an approach where investigative questions focus on what is going well (Page-Tickell, 2017) whilst Watt, Boak and Gold (2023) discuss team learning which they link to shared or participative leadership. Allen and Hartman (2008) consider the use of blended or e-learning in LMD and Smith and Keaveney (2017) note the challenge of providing meaningful LMD online for senior leaders. Face to face leadership training for St John Ambulance volunteers was effective in

terms of both engagement and outcomes (Pollitt, 2006). A variety of approaches is therefore applied within LMD. Finally, the link between LMD, effective leadership and the learning organisation is also identified by McGuire (2014). It can be seen there are felt to be a variety of LMD solutions fit for differing contexts.

As has been the case throughout this review of the literature, the overwhelming majority of the research is based on LMD in a for-profit business environment, however where research has taken place with non-profit leaders, the approaches they identified as helpful were coaching and mentoring, networking and online learning, rather than more traditional classroom training (Gill, 2011), and often informal learning (Mündel and Schugurensky, 2008) which Fullwood and Rowley (2021) state is critical amongst volunteers.

Evaluation of LMD is not often discussed but Watt, Boak and Gold (2023) do talk about the importance of this, not solely to prove its efficacy but also to support further organisational learning; that said they note the challenge of measuring changes which may have other influences.

It can therefore be seen that although the key theorists agree broadly on adult and managerial learning, and that there is a consensus on the methods used, there is a lack of agreement on the purpose of LMD and how it is structured. Again it must be noted that this is all in relation to LMD within a business environment and given Hodges and Howieson's (2017) comments regarding the dangers of cutting and pasting for-profit approaches into the third sector, further supports the need for considering LMD specifically within the third sector, and more specifically in relation to volunteers managing volunteers.

Gordon and Gordon's (2017) research looks at how LM skills acquired in a voluntary environment were applied by the individuals to their formal paid roles. They found evidence of transfer from both formal and informal training, and respondents noted that because of the different power relationship in managing in a voluntary environment, they needed to develop different skills and potentially use these skills differently also. Given that Stewart (2009) highlights the lack of agreement on what the purpose of LMD is i.e. for the benefit of the organisation or of the individual, this further complicates the situation. It could be argued that it is not just the skills which need to be used differently but perhaps a broader understanding of the purpose of

the LMD which has been undertaken and how this might fit with the culture of the organisation where the skills are used, not just for the organisation where the learning and training has taken place.

Although the term Leadership is used within LMD, it is also used to identify development of skills more traditionally referred to as management skills, particularly at an individual level where this would include management of human resource planning and labour market issues. At organisational level the focus shifts to include both management and leadership skills such as managing absence and influencing and supporting cultural change. At a sector level the LMD activities are about developing a vision and at community level are focused more on social responsibility and at both levels LMD is seen as contributing to achieving these goals (Clarke and Higgs, 2010). This clearly shows that the development of LMD programmes and measuring the impact of these needs is a complex set of activities. This contrasts with Gill (2011) who considers LMD from an individual view, identifying specific needs such as individual self-awareness relating to behaviours as well as preferences in communication and learning. This reflects the differing approaches seen in the wider business literature about the type and reasons for LMD.

3.3.7 The Missing Pieces

As can be seen from the above discussion, there is a sizeable body of work relating to LMD, some of which is specifically related to the voluntary sector which focuses on what the content of the LMD should look like, effectively covering the design and delivery elements of the training cycle (Beevers, Rea and Hayden, 2020). However there is no explicit mention of any kind of learning needs analysis and very little discussion of evaluation apart from in general terms, making these two elements a missing piece from this chapter.

This could be linked to the ongoing discussion about professionalisation of the sector and those within it – both employed and volunteering. Stewart and Kuenzi (2018) note the move towards professionalisation of the sector but also note that in terms of career progression within the sector, at CEO level, there is “a preference to nonprofit background experience over management or trained expertise” (p.370). Bezboruah (2011) agrees that a lack of formal management experience is common in the sector

and, in spite of the risks of over-professionalisation, goes on to state that professional leadership is essential in nonprofit organisations to support reputation and sustainability. This does not have to involve management education however but can be focused on professional behaviours and delivery of the service with passion, trust and maintaining standards.

Evaluating the impact of LMD needs to be closely linked to the intervention and by extension the learning needs captured in an LNA (Patterson *et al*, 2017) so there is clear link between these two steps.

LNA is an important step in identifying what needs to be developed, but also what is not working within an organisation. The first step is to carry out a performance analysis to identify problems and causes and propose possible solutions. If the solutions are L&D related, this will lead to a LNA being conducted (Choi and Park, 2024). Whether for leader development i.e. about the individual's capacity to lead effectively or for leadership development, LMD activities are difficult to both assess and evaluate (Elmholdt *et al*, 2016). There is a risk that rigid pre- and post-assessment tools searching for definitive answers do not allow individual managers to consider context specific needs, or identify particular needs (Elmholdt *et al*, 2016). Self-identification of needs can also be used (Huang *et al*, 2014) although this was specifically in relation to procedural training not LMD. As in nonprofit environments roles are a mix of management and leadership, whereas in for-profit organisations leadership roles are more likely to be focused on leadership (Bezboruah, 2011) there will be a need for a more flexible approach to identifying needs.

Evaluation as a process is key to enabling nonprofit organisations to meet accountability requirements as well as support improvements. To do this effectively it needs to be integrated into wider organisational culture and practices. A reluctance to question assumptions and experiences and to avoid change are barriers to evaluation (Rogers and Gullickson, 2023) and tools which limit or discourage reflection and encourage compliance with the ideas expressed in the LMD (Elmholdt *et al*, 2016) can also be a barrier. What specifically is to be evaluated needs to be clearly outlined at the start and Patterson *et al* (2017) point out a number of key considerations: collecting different stakeholder views to give a rounded perspective; know what kind of change is being sought and measured;

measuring progress at a range of timescales post the intervention to help identify trends. Further, where individual leader development is undertaken, it is important to recognise that improvements in individual skills and behaviours may not always translate into organisational improvements but clear connections between knowledge gained and outcomes will help here. This links to Henriksen and Borgesen's (2016) observation that behavioural change is dependent on transfer of learning from the learning event back to the workplace, and they include learning from non-formal and informal aspects here as these enhance the learning from a formal process and underlines the importance of everyday practice in embedding formal LMD (Elmholdt *et al*, 2016).

Both these areas are under-represented in the wider learning and development literature and have been for a number of years – this researcher investigated evaluation and transfer of learning in her Masters dissertation in 2011 and the lack of meaningful research into evaluation was commented upon then too. The risks of not considering meaningful and appropriate needs analysis are that LMD is either not provided at all, or inappropriate LMD is provided, leaving a demotivated or disinterested learner and money is wasted. Formal LMD can be expensive and funding it can be problematic for organisations (Johnson, 2022). Without good LNA leading to meaningful LMD, VVMs may be unsupported in their roles. Evaluation of the LMD provided will help ensure that what is provided to VVMs is appropriate, timely and fit for purpose.

3.3.8 Section Conclusion

Overall it can be seen that there is a body of literature looking at LMD, and there is a limited body of work focused on the voluntary sector. However, much of it is US based and the lack of European based research in this area calls into question how applicable this is within a UK environment (Hodges and Howieson, 2017). The research also focuses on the development of leadership and management skills for paid staff to manage volunteers; the different relationship between staff and volunteers challenges the applicability of this research where volunteers manage other volunteers. It also has a strong focus on design and delivery and scant consideration is given to learning needs analysis and evaluation. The limited focus

on these two areas is longstanding, with Adams (2011) identifying this and Kirkpatrick and Kirkpatrick (2010) stating only 15% of time on average is spent on these two activities. This shows a definite gap in relation to developing leadership and management skills, particularly in a UK/European context.

3.3.9 Chapter Conclusion

Not only is the application of leadership and management in volunteering unclear, with some practice using business approaches and theorists clearly recommending a more shared approach, but the provision of LMD is patchy. Whereas leadership/management research is present, albeit relating to staff managing volunteers, research into LMD for volunteer volunteer managers appears to be overlooked completely.

Chapter 4 - Methodology

4.1 Overview

This chapter will provide an overview of the researcher's methodological perspective and positioning in relation to the thesis and its research. It will attempt to unravel the different strands of philosophical underpinning and consider why certain approaches were more relevant for this research and this researcher.

Methodology is seen as the most important part of a thesis; it provides insight for the reader into the approach the researcher took. It also supports the choice of methods used by relating it to the philosophical standpoint used (Kriukow, 2019). Additionally, the choice of methodology is a crucial part of any research since it will determine the results/outcomes. An unreliable method produces unreliable results and will undermine the value of the analysis of the findings.

Overall the research philosophy or paradigm is underpinned by three broad sets of assumptions (Saunders, Lewis and Thornhill, 2016; Dudovskiy, 2019), namely epistemological assumptions relating to knowledge; ontological assumptions which relate to realities within the research; axiological assumptions relating to how one's own beliefs and values as a researcher impact on the research and how it is conducted. This also links to questions of positionality which will need to be explored.

To identify what ontological, epistemological and potentially axiological perspective, it is first necessary to understand the research itself. Positioning will also be discussed within this chapter.

The purpose is to carry out research into Leadership and Management (LM) and the delivery and application of LMD skills within a small number of charities. The focus is on volunteers who manage other volunteers (volunteer volunteer managers, VVMs).

4.2 Research Organisations

Identifying the charities and gaining access, which is a prerequisite for a successful approach and adequate relevant data (Ng and Coakes, 2014), was a significant and

lengthy challenge. Given that the sector is, as outlined elsewhere in detail, so varied and diverse, there were a number of factors to be considered. The researcher's original request to use Samaritans as a research organisation was rejected and although this did not impact the overall aims and objectives of the study, it did cause a shift in the focus of the organisations. Thus the organisations involved would still need to have volunteers with direct leadership and management of other volunteers, ideally without any staff management of volunteers, and with a range of layers of volunteer management; they would still need to have volunteers using higher level skills, either which the volunteers already had and needed for the purpose of volunteering, or alternatively where training was provided; the organisations would need to be representative of different skill sets required to volunteer. For this reason, Scouts, RNLI and Samaritans were initially considered.

There were a number of setbacks, mostly related to Covid-19 and the impact on the voluntary sector. As many as one fifth of staff in the sector were furloughed by June 2020 (Ricketts, 2020) and by November the FT was suggesting as many as 60,000 jobs would be lost in the sector alongside a £10bn shortfall in funding (Flood, 2020). This meant that key staff with whom relationships had been built were either furloughed or no longer working for the preferred organisations and volunteers were busy picking up the slack from reduced staffing; focused on trying to engage with their key stakeholders through new, often technologically driven, ways and learning through trial and error; or figuring out how to continue to deliver the service in these changed circumstances. From March 2020 to September 2020 no contact was made. In September 2020 attempts were made to re-engage with Scouts and RNLI and some headway was made. Then in November 2020 a further UK lockdown was put in place and both organisations withdrew from discussions due to renewed pressures as outlined above. Issues gaining access to organisations are not uncommon (Saunders and Townsend, 2019). They comment that this can lead researchers taking a more opportunistic approach to gaining access, using friends and other networks. This in turn can lead to a conflict between what is academically rigorous and desirable and what is actually practicable. This has been a particular challenge with this research and has raised questions about why large charities might be reluctant at central level to engage in such research. Answers to this will no

doubt require further research by others in the field since this falls outside the scope of this research

The researcher was offered the role of Branch Director (BD) at her local branch of Samaritans in November 2020. This is a voluntary role, with a term of 3 years, which involves responsibility for leading and managing the branch. At this time, the BD was nominated by the branch volunteers and then offered the role; this was not a role which can be applied for. The branch had at that time approximately 50 volunteers and the associated charity shop a further 20 volunteers. The BD is responsible for management of the Branch and leadership of the volunteers and chooses their leadership team, made up of Deputy Directors and Trustees who in turn identify their own teams. The BD is also expected to continue to broadly meet their regular volunteering commitment, in this case 3-4 hours per week whilst taking on directorship of the branch. The decision was made to accept the role, an honour and a privilege, and although the time commitment for the role would be an added challenge alongside family, work and this thesis, it was also acknowledged that it would provide a significant firsthand insight into a live VVM role.

Following a change of personnel within Samaritans Central Charity, a second request was made in January 2021 to the charity to allow the research. They agreed to allow the research to take place at a regional level and the researcher was now ideally placed to reach out to other BDs in her region in the search for participants.

Given the ongoing challenges for voluntary sector staff, contact was made locally with senior volunteers within Scouts and also to a local Search and Rescue organisation to identify if research participants could be found via this route. Additionally, the researcher used her membership of AVM (the Association of Volunteer Managers) and colleagues' professional contacts to try to identify further organisations and contacts which might have participants able to support the research.

There followed an extensive period in early 2021 of networking and reaching out to a multitude of voluntary organisations, volunteer managers and volunteers. Between the start of 2021 and the completion of the interviews at the end of 2021, the researcher attended three online meetings of the local Voluntary & Community Action group and had further conversations with several members or contacts

provided by them. Several AVM events and meetings were attended, and meetings held with about a dozen volunteer managers. A range of contacts identified volunteers who might have management or leadership responsibilities and obtained contact details. Ultimately, contact was made with volunteers, volunteer managers and volunteers who looked after/managed other volunteers from organisations involved in areas such as animal rescue and conservation, childbirth, homelessness, hospices, theatre groups and foodbanks.

In total, individuals from approximately 25 organisations were contacted to achieve a total of eight interviews from eight different organisations. These volunteers came from the following organisations/areas: the RNL; the Royal British Legion; a heritage railway; a charity supporting deaf people in community engagement; ReadEasy; a local cathedral; a charity rehabilitating sexual offenders; a local shelter for homeless people. All the volunteers had experience of either past or current volunteering roles with responsibility for managing and leading other volunteers, although the roles were often not badged as such, which is reflected by Jackson *et al's* (2019) observation that titles for those managing volunteers, whether paid or not, are varied and often include a variety of activities. The remaining eight interviews were conducted with Samaritans senior volunteers – consisting of six Branch Directors, one Regional Director and one Quality Officer. Two of the Branch Directors were women, all the other Samaritans participants were male whereas the remaining eight participants were made up of four male and four female volunteers. Through the Branch Director role, the researcher was able to reach out to other senior volunteers with whom she came into contact, some from outside the West Midlands. This contributed to the geographical spread of the participants.

It can be seen from the above outline that whilst identifying possible potential participants was a challenge, actually gaining agreement was even more problematic. Covid-19 exacerbated these issues, but the specific requirements added to this. It became evident that charities needed to be of a certain size and type before the need for one or more leadership and/or management roles became necessary, meaning small charities were often not suitable – for example one dog rescue charity had only three Trustees and the “volunteers” they worked with were those who fostered the rescue dogs, meaning there were no leadership or management activities as required by this research. Larger charities often have

more complex leadership/management structures, but with a few exceptions, those approached were also local rather than national charities, which supports the statistics relating to staff/volunteer ratios in most large national charities. Although identifying organisations and participants was a challenge, it did lead to a rich variety of views and perspectives for the research overall.

An additional contribution to the research process came from several contacts made through AVM connect, a randomised linking of AVM members for informal chats as well as attendance at a range of conferences and events run by the AVM and the VSSN/VSVR (Voluntary Sector Studies Network/Voluntary Sector and Volunteering Research). These events were attended by those involved in both the research and delivery of volunteering and volunteer management and a range of topics relevant to this research were often discussed. These provided additional, current perspectives, the breadth of which adds a further dimension to the research, demonstrating that the issues raised in the individual interviews are indeed reflected more widely across the sector. They have taken place over the duration of the study, so 6 years, with only brief, personal notes made, usually undated and unnamed, meaning they are not individually cited or quoted. Partly this is because the relevance of them was not initially obvious but only became so when seen in the wider context of the research. Additionally, because they are informal observations, there was no formal ethical approach applied to the use of this data so citing and quoting specific individuals or views would not be appropriate even if it were possible.

A small number of specific conversations were held with senior leaders and experienced volunteer leaders/researchers and it was agreed with these participants, as well as those made through AVM connect, that the overall content of the conversations would be included in the research but to maintain confidentiality, only brief notes were taken during these conversations.

4.3 Ontology

However, whilst it is easy to see the importance of understanding the methodology behind the research, identifying the specific approach taken can be challenging. When discussing ontology a variety of terms are used: Saunders, Lewis and Thornhill (2016) and Bryman and Bell (2015) use the terms objectivist whereas

Dudovskiy (2019) uses the term positivist and still others use the term realism (Killam, 2015). Whilst this is somewhat confusing, it is clear from the descriptions provided that they do all explain the same view of reality and how it is formed. When discussing alternative views of reality and its formation it is often unclear whether the words used mean similar or different concepts. Killam (2015) uses the term relativism as the alternative to realism. In contrast, Bryman and Bell (2015) offer constructionism as an alternative to objectivism, whilst Saunders, Lewis and Thornhill (2016) offer subjectivism as the opposite of a realist/positivist ontology. lafrati (2023) points out that constructivism looks at how shared meanings are constructed whilst being aware of power relations, which perhaps sets it apart from subjectivism or interpretivism. Rather than take a binary view, Dudovskiy (2019) offers a range of choices, namely pragmatism, realism and interpretivism. Guba and Lincoln (1994) use the terms realism (or naïve realism), critical realism, historical realism and relativism. Whilst authors do indicate that there is a difference between the terms *they* use e.g. Guba and Lincoln (*ibid*) provide a table to help distinguish the different types of realism, this lack of consistency in terminology across authors makes critical analysis of the approaches a challenge. Other authors would argue that subjectivism and constructionism are different ontologies (Difference Between, 2023.). To further muddy the waters, others such as Denzin and Lincoln (1994), Kriukow (2019) and Pretorius (2018) do not provide any label but explain instead how ontology supports the overall paradigm. This overall lack of clarity makes identifying the correct ontological approach a challenge if, as is the case in this research, the approach is not a positivist one.

The analysis of terms relating to epistemology has the potential to add to the obfuscation. Here we see terms as varied as dualist, objectivist, transactional, subjectivist (Guba and Lincoln, 1994); etic and emic (Guba and Lincoln, 1994; Killam, 2015) and positivist, realist, interpretivist (Bryman and Bell, 2015). Moss (n.d.) offers just three epistemological perspectives, namely objectivist, constructivist or subjectivist. However, we have already seen many of these words used by other authors to indicate ontology. This perhaps justifies Moss (n.d.) citing Crotty's assertion that only the epistemology should be clarified. When the ontology and epistemology are combined, the result is the individual's research paradigm. At this

point, the same words which have been used to define both ontology and epistemology are used again.

Having identified the underpinning philosophy, this allows the research into the leadership and management approaches, how these are acquired and/or developed in VVMs to be undertaken with confidence in the approach being used. It enables these abstract ideas to be applied and used to support robust research and findings relating to the topics.

The researcher who believes that there are different views of reality, that reality is socially constructed and derived from the experiences and perspectives of the research subjects will need to adopt an alternative approach. A relativist ontological approach supports this view, and it is postulated that this research is based in relativist ontology since the reality the researcher believes in is one whereby the experiences of the research subjects will be interpreted by those individuals' own experiences. These will be relative to their own lived experiences of leadership and management, either as done *to* them, or done *by* them *to* others, or a mix of these as well as being relative to their experiences of LMD and how they have been able to apply this in the specific circumstances of managing other volunteers.

The richness of information that reflects these different views and experiences could not be gathered through quantitative research methods, meaning that a qualitative methodology was the natural choice. As discussed in more depth elsewhere, focus groups were considered and rejected, and on reflection the use of interviews allows participants the time and space to reflect on their responses and be honest about their beliefs and views without fear of judgement or interruption. Additionally, the voluntary sector is itself diverse and qualitative methods such as interviews allow this to be reflected in the research, further supporting the choice of both methodology and method.

4.4 Epistemological Perspective

If a relativist ontology is then deemed the most appropriate for this research, the next stage is to identify the epistemological perspective. Again, dependent on the sources used, it is possible to find a variety of terms to use here. Since the research

is, as stated above, not positivist in its nature, it must be something else. The most obvious choices here would be interpretivist or constructivist. Epistemology for a researcher is about clarifying what makes an acceptable justification for what we say we know and this is reliant on three key areas: truth, belief and justification. Is it true (what sort of evidence makes it true?); do I believe it (what evidence – if any – supports my belief?); what justification do I use to support these (is it because there is evidence or because there is a high probability it is true or likely?). However, knowledge is also needed to support this. (Stanford.edu, 2016). How individuals, particularly the research participants, interpret their own experiences and use this to construct their own realities will identify similarities and differences between the interviewees, regardless of which organisation they volunteer with.

Although we know things based on interpretation of our experience and/or learning, these standpoints can be challenged through different life experiences and/or learning. The philosophical challenge therefore is to balance these truths and knowledge alongside an acknowledgement that some of that information may be unreliable. This is defined as the “external world” problem. If knowledge is categorised as follows: intuitive knowledge based on an individual’s beliefs and feelings; authoritarian knowledge from experts; logical knowledge created through application of logical reasoning; empirical knowledge from objectively established and demonstrated facts (Dudovskiy, 2019) it can be seen that knowledge through research can be gathered in different ways and these too can influence the epistemological stance of a researcher.

The other issue is the “other minds” problem. This is the premise that one person cannot understand how another perceives things. That could be the sensation of pain, how a colour is seen or one’s own experience of managing or being managed as a volunteer. Having had the same experience does not mean you understand how it is for the other, since experiences are unique to each individual (Stanford.edu, 2016; Dudovskiy, 2019). This view is one strongly supported by this researcher and the justifications for this personal perspective will be discussed in the sections on axiology and positionality.

One’s belief as a researcher about this knowledge and its origins are what help to form the epistemological approach. Research which investigates the participants’

views of the topic, how these views are formed and what internal (personal to the participants) and external (related to e.g. organisational structure and culture) factors have influenced them can be seen to be interpretivist in nature rather than positivist. Interpretivism, according to Dudovskiy (2019) focuses on specific and unique views and information, generates meanings relative and relevant to the participants which are identified through their participation and interaction and ultimately is socially constructed. These social phenomena are influenced by the perceptions and actions of the social actors i.e. what is taking place is actively impacted by external influences (Dudovskiy, 2019). This supports the approach taken in this research to an extent since the perceptions of the participants forms their interpretations of this, but this is only part of it, since the impact of different environments and experiences will also play a significant part. So an interpretivist approach would only partially fit this research.

In contrast, the constructivist position is explored where the views of those involved are shaped by their experiences and held in relation to their experiences and environments (Charmaz, Thornberg and Keane, 2018; Dudovskiy, 2019). It can be seen that there is overlap between the two approaches, whereby both are relativist in nature, predicated on information gathered through studying or investigating individuals and their perspectives of their experiences, as well as acknowledging the role and perspective of the researcher in the process. Given the wide variety in the range of charities, their size, purpose, structure and requirements of and from their volunteers in relation to skills and roles, identified elsewhere, this approach fits within the sector and topic.

This leads to the question of whether this research is interpretivist or constructivist in its nature. At this stage (May 2020) it would appear to include elements of both; from a constructivist view the research is interested in how the individuals interpret the meaning of their experiences as leaders and managers, what meaning they take from their skills acquisition; from an interpretivist view it is about how the researcher understands and interprets the information in relationship to the wider complexities and influences (Saunders, Lewis & Thornhill, 2016). It is possible that the work ultimately takes from both views, or as the primary research takes place a definitive view may become clear. On completion of the analysis in June 2024, it would appear that the research has remained with foot in both camps. The participants all

considered both the external influence of their experience in a range of environments and their own perception of their role and the relationships, particularly with volunteers. The researcher's own experience of leadership, management, learning & development and volunteering also played a part.

However, the reality is that leadership and management, what it is perceived to be, how it is expected to be conducted, are all views which are influenced by factors external to the individual leader/manager. As Gill (2011, p.1) notes, there is "no agreed paradigm...for the study and practice of leadership". He adds that since we can identify the importance of 'good' leadership but not actually define definitively what that means, what remains is a plethora of possible measures of effective leadership, based on behaviours or outcomes identified by wider contexts i.e. external factors. He also adds that effective leadership is related to effective change; this too is an external factor. If this research is to consider the impact of external factors on leadership, management and LM skill development, and it is the researcher's view that it must, this brings in the need to recognise that elements of an objective reality will also influence the research. A pure subjectivist approach, where the experiences of the participants are all that is considered, will therefore be tempered by the recognition of the organisational realities imposed on the leaders/managers and the organisational requirements for the acquisition of the skills to carry out these roles.

This need to temper the experiences of the individual with the impact of external factors lends itself to the use of critical realism as a framework for this research. Bryman and Bell (2015) note that critical realism recognises the importance of the structures that form an external reality (a feature shared with a positivist view) but additionally, and specifically, they acknowledge that the words used to describe the focus of the research can be subject to change. Grey (2014) adds that the critical realist researcher acknowledges that his/her own beliefs and values also influence the research and recognises that "the complete truth may be hard to come by" (p.26). The subjectivity of the researcher is accepted as a natural part of the creation of knowledge from this research approach. As a pluralist approach to research, it allows for a range of methods to be used, with the researcher identifying those methods which will provide the most robust results, rather than adhering to a strict diet of purely qualitative or quantitative tools. This approach supports this

research since the differences amongst the charities, their structures, the volunteers and their skills may require more than one method to obtain those robust results. This further supports a realist ontology whilst acknowledging the diversity of experience and its importance. A less flexible approach may result in poor research outcomes, so the ability to consider the most appropriate method is necessary.

4.5 Axiology

Having considered both ontology and epistemology, it is usual to consider the axiological perspective next. As with other element of the methodology, axiology in relation to the research paradigm could become another rabbit hole down which a researcher could fall, get lost and confused. Broadly, axiology is the theory of value or goodness according to the Encyclopaedia Britannica (2020) but when used in relation to research, axiology has a more specific meaning. Here it is related to the researcher's values in relation to every stage of the research – the aims, how it is conducted and what outcomes are valued by the researcher (Dudovskiy, 2019). As a researcher, one needs to be clear if the aim is to explain what is happening, predict what might happen or to understand what is happening.

If axiology is about understanding the approach to research, then the researcher herself surely needs to understand what personal values underpin this approach and where these values have their roots. Although consideration of axiology is undertaken after the ontology and epistemology are discussed, it would seem to this researcher that understanding one's base drivers would be a more logical place to start, since firmly held beliefs and values will influence what is researched, so what is and is not seen as acceptable in terms of aims, approaches and how participants are engaged with (Dudovskiy, 2019).

Reflexivity in research (Attia and Edge, 2017) can be seen as something that both shapes and is shaped by the researcher. Thus, the researcher shapes the research in a certain way, but through carrying out the research, is in turn shaped by that through e.g. the process or the findings. This reflects the view of lifelong learning and how what we experience influences who we are becoming (Gee, 2017).

Reflexivity however is much broader than just research: it is fundamental to individual development; it contributes to the whole person. Reflecting on personal

values, their beginnings and development therefore forms part of this process, not just within the methodology, but throughout the research. This is an important aspect of the research, since it can shape what is researched, how it is researched and what is valued in relation to the findings. As long as personal bias is avoided, this allows the researcher's voice to be heard in the research, further supporting a paradigm and accompanying methodology which acknowledges that effective research can include the researcher's perspective and does not have to be a solely objective activity.

4.5.1 Where Do My Values Come From?

My family background, education, volunteering and career experiences have all contributed to the development of my values and beliefs.

Volunteering at Samaritans has probably been the biggest single influence in my adult life in terms of my values. Listening without judgement, not giving advice, exploring what the caller's reality is like for them and "being alongside" the caller in their darkest times has reinforced those earlier lessons about life being complex and nuanced. I have learnt that everyone has different experiences which contribute to making them the person they are now and influences how they deal with issues and challenges.

My career moves (choices would infer that career planning took place; it rarely did) particularly in the second half of my career, have highlighted the pleasure I take from helping others develop and grow, be that their knowledge or skills. The teaching of ethics in particular has heightened my awareness of different perspectives and increased my belief that is unhelpful to apply absolutes to many areas of life. Rather it is necessary to understand what prompts an individual to make a particular decision or hold a specific view.

These values influence the approach taken to research as follows:

- Life is nuanced, not made up of absolutes. For the individual this means that one could view e.g. application of leadership techniques in different ways at different times, depending on a variety of internal and external factors. For a group, this means that different people in the same organisation or same role

or who have had the same training could view the process and outcomes very differently. Therefore, this researcher could not engage in research based on a positivist paradigm since it does not fit with these beliefs.

- Life is complex. Identifying these complexities will help us gain more detail and make better decisions. Generalisations can be dangerous and unhelpful so ensuring sufficient data is available to support any decisions is critical. Rich data helps to gain better quality information; qualitative data, as will be gathered in this research, rather than quantitative will achieve this.
- I still need to work on building my confidence, as a researcher particularly but also as an academic. I need to have the courage of my convictions. I also need to continue to have self-awareness about my feelings about the whole PhD process. To be confident enough to recognise that the route is littered with troughs and mountains, that the high plateaus may be few and far between but to remember also that I am able to achieve this.
- Others' views and beliefs are theirs. They do not have to be mine; I do not need to agree with them but as a researcher I do need to respect them. I may also need to understand them more deeply and possibly challenge them to understand what values support these beliefs but will strive to do so in a supportive and non-judgemental way. This is also part of the learning process of research.
- Acknowledge and recognise that others' experiences are not the same as yours and even if you have shared the same experience, your response to it will be different to the other person's; it will be viewed through the lens of individual experiences, current emotional state and a myriad of other influences.

These are all to some extent driven by a degree of reflexivity: my experiences have shaped me, but they have also allowed me to shape my life and have influence on others. This in turn shapes my beliefs about what is important in my research and supports the overall research paradigm of a subjectivist nature. For this researcher at least, it underlines the connection between the research and the researcher themselves, challenging the view that research is purely objective.

My understanding and interpretation of leadership and management has been influenced partly by the academic learning and study, but predominantly by personal

experience. This has been observing how others manage, the influence this has on me and my peers, both in work (business, FE and HE) and within my volunteering at Samaritans. Provision of leadership and management development and these experiences have an impact on how individuals perform and engage with their roles (Rehman *et al*, 2020).

Having had these experiences and held leadership and management roles in both business and the voluntary sector, I have seen how management and leadership approaches are often influenced by the organisational culture and the individual's own preferences and experience. It has also informed my views on leadership and management in the voluntary sector, as a volunteer, and highlighted the importance of good quality leadership and management in the sector.

4.6 Positionality

Having identified what reality looks like in this research, considered how we acquire knowledge and then explored the beliefs of the researcher and how they influence these, the next step is to consider positionality i.e. one's position as a researcher in relation to the organisations where research will be carried out, as well as the wider social and political environment. Interestingly, a review of eight textbooks all dedicated to methodology (Bryman and Bell; Brewerton and Millward; Saunders, Lewis and Thornhill; Yin amongst others) identified that the term is not mentioned in the index of any of these, whilst an internet search reveals 123,000 results. The first page or so of results shows that these sources are blogs or websites from other academic institutions or journal articles. The Weingarten Learning Resources Centre (2017) notes that being 100% objective is not possible and at some level our self as researcher will influence the data, since there will inevitably be some level of interaction between the researcher, the data gathering and the analysis. They recommend writing reflexively as a way of ensuring that this element of ethical research is done sufficiently robustly and suggest reflecting on areas such as how one's own perspectives support or challenge the research; whether the approach to research is consistent with one's own beliefs; how one's positionality influences one's view of differences between researcher and research participants (ethnicity, education, gender etc) and potentially between the participants themselves.

They provide the following diagram which identifies a range of considerations for the researcher.

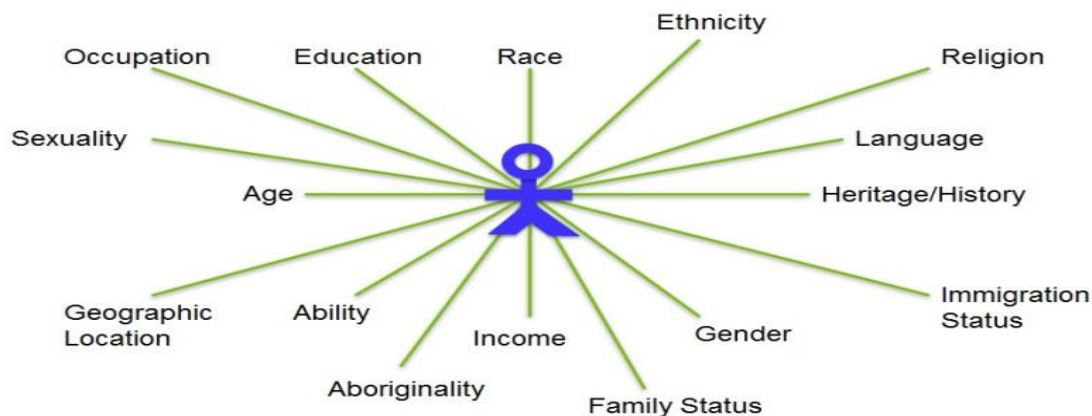


Figure 4.2: Writing Strategies: What's Your Positionality (Weingarten Learning Resources Centre, 2017)

Berkovic *et al* (2020) agree with the need to understand positionality. They also identify the need to avoid making assumptions about others' lived experiences and maintaining impartiality as a researcher as key elements of this. The qualitative nature of their research makes these observations relevant to this research. Their role as an inside researcher, someone who shares the experience (in this case of an illness) of the research participants is also partly relevant to this research.

In my work career, I have been managed by a range of different people in a range of different environments (manufacturing, retail, education) and also managed others. Training and support were provided to help develop leadership and management skills within the workplace. As a Samaritans volunteer, I have been managed at varying levels within the organisation – locally, regionally and organisation-wide – by volunteers in diverse roles themselves. I have managed other volunteers at local and regional level. I have received minimal training and support in volunteer management. My own interpretation of these various experiences will influence all aspects of my research. The other aspect of this is how the knowledge (or lack thereof) might influence the relationship with participants in terms of their reaction and response.

4.6.1 Impact on Research

One's own experiences colour how one views the world. If my own management and leadership experiences have been negative, then there is a risk that the thought process which influences the choice of language for the research tools themselves may be biased to reflect this. The use of appropriate neutral language is an important consideration at design stage. Any bias or preference can then also become apparent in written or verbal communications with participants e.g. introductory correspondence, questionnaires and interviews and further in the interpretation of responses of participants. My experience as a Samaritans volunteer, where we are taught to clarify until we understand things from the other's perspective, will be useful here in maintaining that impartiality and reducing the risk of my views colouring how responses may be interpreted. This in turn reduces the risk of any bias being evident in how data is analysed and presented. The use of clean language techniques, where the aim is to keep one's own views and opinions out of the conversation and also to reduce the amount of 'contamination' from the questioner (Sullivan and Rees, 2008) will help ensure that this is reduced.

4.6.2 Impact on Participants

Since ethical behaviour is a given in research, the question of an appropriate level of honesty with participants about my own position in the research also needs to be discussed. The consideration is what information to disclose: the salient points are that I am a volunteer; specifically, a Samaritans volunteer; how long I have volunteered; the levels within the organisation where I have held LM posts; what sort of training and support was offered; the structure of volunteering within Samaritans. The more of this information I disclose, the more likely it is that disclosure of personal views and opinions will happen. As well as interviewer bias, the researcher needs to have an awareness of both interviewee/response bias, whereby the responses are self-censored in some way, and of participation bias, whereby the ability to build rapport with participants due to shared experience, or ability/willingness to participate in the research (Saunders, Lewis & Thornhill, 2019). Considering strategies to minimise this will improve the quality of the research and its findings.

That I am a Samaritans volunteer is something I will disclose. The knowledge that I too am a volunteer and can relate to their experiences in some way should allow rapport to be built more effectively, leading to a more open discussion. This may provide both benefits and challenges. Participants may feel more comfortable sharing a range of thoughts and feelings with me. My commitment to confidentiality and anonymity as a Samaritan could reinforce their trust in me and increase their honesty and frankness. However, it may also lead them to share thoughts and feelings which require a Samaritan response. This is an area where I will need to have a heightened awareness of this and manage these conversations appropriately (stop recording or taking notes; offer emotional support; identify appropriate places to signpost; consider safeguarding issues). Silverio *et al* (2022) note that although qualitative research has made significant steps in achieving greater acceptance when compared to quantitative research, and is particularly useful in exploring sensitive topics, little research has been done on how qualitative researchers can protect themselves when discussing such topics. Although the nature of this research does not intentionally cover sensitive topics such as bereavement, trauma or suicide, there is the possibility that such conversations may occur and self-awareness of this and any associated difficult feelings for the researcher will also be important. As well as the potential emotional impact on the participant, or possibly the researcher, such an occurrence may result in the research taking longer (extending the interview; analysis taking longer) as noted by Saunders, Lewis & Thornhill (2019) or in the whole interview not being suitable to use. There is also the emotional toll on the researcher to consider, so ensuring possible support has been identified would also be good practice. Discussions about what support a participant might have, or know about, and my own knowledge of organisations to use for signposting will be useful here if required.

The above assumes that knowledge of my Samaritans volunteering is seen as a positive. It is also possible that a participant may have had a poor experience with Samaritans, or just have a negative view of the service and its volunteers. This could then influence any conversation in a negative way or put the focus on the researcher.

Other elements will be disclosed dependent on the individual circumstances. My length of volunteering (over 25 years at point of research) may provide additional

confidence for some that I have a range of experience, for others it may provide a barrier. Whilst I would disclose that I have held a range of LM roles within Samaritans, specific details of this are unlikely to be shared unless they seem important to an individual participant. It may be helpful for participants to know the basic structure of Samaritans (volunteers manage volunteers; staff manage staff; volunteers provide the service; staff provide the functional support to enable this) as this will enable them to see how it links to their own organisational structures. However, too much detail here, along with information such as training offered are likely to move the focus away from the participant and onto the researcher which directly contradicts the idea of impartiality as a key tenet of good researcher positionality.

Being aware of potential challenges raised by cultural differences is an important skill for a researcher. Since this researcher is a Samaritans volunteer, there is a risk of participation bias influencing the research when interviewing Samaritans volunteers due to the shared language and experience. There is also a risk that the cultural differences when interviewing participants from other charities could have an effect, strengthening or weakening the rapport and honesty of answers given (Saunders, Lewis & Thornhill, 2019). When conducting the research it became clear that the language used relating to roles that involved some element of leadership and management varied significantly between organisations. In some charities a range of LM activities were expected to be carried out, but this was not reflected in the title. In others the expectation was clearly outlined. Where it was not reflected, there was a sometimes a need to clarify what types of activities might constitute LM activities. This involved finding a balance between providing relatable examples and not influencing or directing participants when sharing my own experiences, providing an example of how cultural differences can influence the research process and outcomes and the importance of awareness of such issues.

4.7 Critical Realism

It could be argued however that a critical realist (CR) paradigm is relevant here, since leadership and management theories have been constructed over time and are now often seen as realities (Saunders, Lewis and Thornhill, 2016). Venable (2011)

considers that this is an appropriate approach when considering the development of new practices in organisations, including businesses and not-for-profits. This approach also allows the investigation of relationships and impacts between a variety of stakeholders within their contexts and allows the researcher to develop and explain knowledge that is relevant within this context (Cecez-Kecmanovic, 2011). It can also be seen as an approach which “challenges established social conditions and institutions” (Cecez-Kecmanovic, 2011). Inherent in this is an objective and unbiased approach to the research however given the researcher’s knowledge of the voluntary sector in general and Samaritans in particular, this may prove challenging. This would further support a subjectivist approach.

Since this research is investigating the experience of volunteers in relation to developing leadership and management skills, a direct/naïve/empirical realist approach which assumes a broadly unchanging reality, where reality is knowable and easily understood would not align with the wider research philosophy. A CR approach would be to recognise that whilst the structures in which these volunteers function can be viewed objectively, there are a wide variety of influences on these which support the need for a multi-layered approach. These factors include consideration of the wider historical context of the organisation and the research participants, an acknowledgement that “facts” are often a subjective view influenced by the participants’ lived experience (Dudovskiy, 2018). Bryman and Bell (2015) concur with the importance in this approach of identifying the structures which produce or influence the experiences whilst Gray (2014) reinforces the importance of the participants’ perceptions being driven by their beliefs and expectations.

From a researcher’s perspective there is an awareness of the need to reduce bias and maintain an objective viewpoint (Dudovskiy, 2019) whilst acknowledging that subjectivity, and even a degree of fluidity in the categorisation, are inherent within the gathering of information and creation of knowledge (Gray, 2014; Bryman and Bell, 2015). All three authors concur that due to these factors, the best methods for research are those which best fit the individual research, giving the critical realist researcher a wide range of approaches to consider and the possibility to mix and match methods across varying methodological perspectives.

These definitions support this research, since the volunteers will have a range of experiences of leading, managing and how and where these skills have been developed. The different organisations, their view of effective and appropriate leadership and management, approaches for developing these and how well-developed these approaches are, will all contribute to the participants' views of appropriate L&M and what makes LMD effective. Additionally, volunteers may also have carried out L&M activities and undergone LMD of varying kinds in professional paid roles. This experience will also be flavoured by that organisation's values, culture and approach. When this has occurred e.g. before or during the participant's volunteering L&M role may also influence emotional and intellectual responses to L&M approaches. It can be seen that all these factors can be considered within a CR framework since it allows for the consideration of a range of structures, attitudes, beliefs and experiences to be considered and reflected upon.

It is interesting to note that CR can be viewed as a bridge between a realist and interpretivist ontology (Zachariadis, Scott & Barrett, 2013; Vincent and O'Mahoney, 2019). This is demonstrated by the combination of the realist assertion that reality "exists independently of our knowledge or perception of it" (p.857) and the relativist view that reality is socially produced by people and therefore both insightful and imperfect. Insofar as it believes that information gathered needs to be interpreted, critical realism also demonstrates some commonality with interpretivism. However, it differs in that it accepts and includes in its approach, the existence of a causal relationship between individual characteristics and activities and the social structures in which these are evident.

Vincent and O'Mahoney (2019) observe that the importance of causal relationships is a key feature of CR since when entities interact, change can occur caused by the interrelationship between the entities. They further discuss that the social mechanisms which cause these transformations cannot happen in isolation and that reality is determined from a multiple of events and causations. This research considers these causal relationships and events and wants to understand the multiple layers which contribute to the participants' experience of leadership, management and the development of these skills in their role as VVMs. Their writing would suggest that this research is in effect a CR comparative case study, aiming to explore how LM and LMD occur in different organisational contexts, and whilst this is

the case, it is hoped that the findings will be applicable in a much wider range of contexts than just those explored within this thesis.

This approach of researching a range of fluid relationships within the context in which they occur lends itself to qualitative approaches whereby these nuanced interpretations can be explored. Qualitative methods such as interviews and case studies allow for the relationship between the different elements to be described and identified and thus interpreted and understood – a significant element of critical realism. Once again this supports the use of CR within this research since it will allow explanations related to the specific situations to be analysed and presented within their contexts and also compared with other contexts, identifying patterns, trends or significant differences in L&M and LMD within the participating voluntary organisations.

Historically positivist methodology has been used within management research (Dudovskiy, 2019) and Hesketh and Fleetwood (2006) note the same with HR research. They comment that this approach both operationalises human resource practice (of which LMD is a part) and loses the social complexity required to explain what is happening within a wider human resources context; their research identifies how critical realism can help to provide this deeper insight and explanation. Whilst there has been a tendency to focus on quantitative research in the voluntary sector (Scott and Russell, 2005; Hardwick, Anderson, Cooper, 2015), there is a recognition that qualitative research provides both a balance to the need to measure a range of quantitative outcomes and a depth of information that helps develop understanding of wider aspects of volunteering (Scott and Russell, 2005; Hogg, 2016; Arn, 2018). These arguments further support the use of critical realism within this research. Darracott (2016) defines CR as a “complicated middle ground philosophy” and notes it does not presume to find answers solely through one methodology or perspective. This integrated approach means that it can involve both an inductive (theory construction) and deductive (empirical investigation) design process and both qualitative and quantitative research methods.

4.8 Inductive and Deductive Approaches

Saunders *et al* (2016) and Bryman and Bell (2015) consider deductive and inductive approaches and their limitations. Although this research will consider existing bodies of knowledge when considering LM and LMD, the majority of the literature considers these specifically in a business context, and what research there is into these areas in a volunteering environment is almost exclusively from the perspective of staff managing volunteers. Since a critical realist paradigm can lend itself to both deductive and inductive research elements, it is anticipated that this research will include elements of both. The inductive element will aim to identify new perspectives in relation to LM and LMD within a volunteering environment and specifically in relation to volunteers managing other volunteers. The deductive, empirical element of this research lies in the acknowledgement and exploration of participants' lived experience and how this relates to the abovementioned perspectives.

As already noted, CR contains elements of both and can also consider abstraction and retroduction (Vincent and O'Mahoney, 2019). Abstraction involves viewing elements of the phenomena under investigation and their relationship to identify patterns and outcomes. Retroduction involves asking "what if" questions to understand the mechanisms and causal relationships behind the patterns and outcomes. In short, these approaches allow the identification of weaknesses and thus further areas of research and investigation; it "overcomes the objectivist/subjectivist and qualitative/quantitative dichotomies, because it is methodologically pluralist and inclusive" (Vincent and O'Mahoney, 2019, p.212). Organisations involved in this research are different, leading to different management and leadership structures. This further supports a broadly inductive approach to the research (Saunders *et al*, 2016; Bryman and Bell, 2015).

Chiasson (2005) states that Pierce used the terms abduction and retroduction interchangeably whilst Ritz (2020) identifies them as complementary. An abductive approach, bridging the theory-praxis gap and ensuring a pragmatic approach to the application of management research could have been considered for this research since Nenonen *et al* (2017) note that the speed of management research means that there is a risk that output in this field is either one or the other. Indeed they suggest that since much management research includes both "conceptual development and

empirical observation” which is interlinked (p.1132), then it is by its nature abductive. They further argue that whilst deductive research is valid, it does not offer any new insights. Inductive research does offer these new insights but these are often based on inference not evidence. Hence both are problematic. This aligns somewhat with Dudovskiy’s (2016) perspective which is that deductive reasoning results in a specific conclusion and inductive reasoning results in a general conclusion. In contrast abductive reasoning takes ‘puzzles’ and uses numerical and cognitive approaches to find the best explanation.

Since this research is purely qualitative, employs a critical realist paradigm and is searching for conclusions rather than explanations (Dudovskiy, 2016) a combined inductive/deductive approach in line with Vincent and O’Mahoney (2019) as outlined above will be used. This supports a critical realist approach to the research, to the researcher’s ontological position and links to their life and research values. Although as noted above, management research often takes a positivist methodology which by its nature would tend to quantitative methods, this research is seeking detailed, rich data reflecting individual personal experiences and perceptions, and this can only be achieved through a qualitative approach. Hogg (2016) notes that volunteering takes place alongside other activities in individuals’ lives and that qualitative research allows the influence of these to be explored.

4.9 Qualitative Data

The gathering of the qualitative data for this primary research could consist of interviews with those in formal leadership positions, ideally at different levels of the chosen organisations, and focus groups, since both are considered to be tools of inductive research (Bryman and Bell, 2015). Both Bryman and Bell (2015) and Saunders *et al* (2016) state the benefits of this approach can be the ability to analyse data as it is gathered, shaping the research as it occurs. There is however a risk of data overload, which given the researchers knowledge of the organisation could be a factor, as could the researcher’s continued involvement in one of the research organisations (Ng and Coakes, 2014).

In order to balance the need for enough data with an overload of information, a total of between 18 and 24 interviews were identified as an achievable initial target. This

would provide sufficient flexibility to allow more interviews to be carried out if necessary but also for the number to be capped should sufficient data be collected after fewer interviews. Consideration will also be given to reliability and validity in the research process (Bryman and Bell, 2015) as well as the potential use of relevant software to analyse data gathered (Saunders *et al*, 2016).

4.9.1 Pilot Interviews

The interviews were piloted with two members of Telford Samaritans Leadership Team and some minor changes made to ensure the questions were clear and achieved the desired outcome.

These identified for the researcher that some specific elements relating to each question needed to be covered and additional prompts were added, for example those under question 3 including the prompt about emotional labour in managing volunteers which came up in the conversations with both participants. The question related to existing skills and support offered was originally two questions but the pilot participants' responses naturally led on from existing skills to support so they were put together for the final interviews. A couple of prompts were also removed as on reflection they were too specifically focused on Samaritans practices. Pilot participants also commented on previous senior volunteer roles they had held and how these influenced their experience and expectations so this was added in. The addition of further prompts ensured that all participants were consistently invited to discuss/comment on key focus areas, supporting the quality of the data gathered.

Another consideration that the pilot interviews highlighted was the importance of the level of the leadership role the VVM undertook. There were some questions that the pilot participants were less able to fully answer e.g. they had been appointed to the role based on being approached by the Branch Director so they were unable to provide a full response to Q5. Also the Branch Director had a level of prior knowledge of both volunteers, their skills and experience outside and inside Samaritans in terms of leadership/management; had provided standard role descriptions to both, discussed their appropriateness and was in the process of organising some relevant development and support for them, which impacted their responses to Q6 and Q7.

Following the pilots and the changes, the researcher paid close attention to the participant responses to questions where the pilot participants' may have differed due to their level of responsibility to ensure that these were relevant to this slightly different audience, which they proved to be.

The pilot also gave an estimated time for completion of the interviews, both of which took about 60 minutes. This enabled the researcher to confidently advise potential participants of the time commitment they would need.

4.9.2 Gathering Data

Sampling is one consideration (Ng and Coakes, 2014) for the semi-structured interviews. Such interviews have the benefit of allowing some consistency but also allow exploration of other related issues (Ng and Coakes, 2014). They allow a deeper and richer investigation into the perceptions, attitudes and feelings of individuals than other methods.

Ultimately the interviews were transcribed through audio typing, printed out and themes identified using highlighters. Personal transcription of the interviews provided a reminder of the key points and allowed the researcher to refamiliarise herself with the content of the interviews. Additionally, some of the participants had regional accents and the captioning software struggled with this, making understanding the auto-captions very challenging. The transcription was not verbatim insofar as the errs, umms and repetitions were not documented, but reports the content without straying from the participants' responses. The research is not taking a discourse analysis approach and since transcription aims to interpret data and provide meaning, this level of detail is not necessary (Halcomb and Davidson, 2006). The extensive notes taken by the researcher alongside the recordings also provide a cross reference if one is needed

After much consideration, the use of software to analyse the data was rejected. Firstly, re-reading and highlighting the data provides this researcher with a more meaningful connection with the data itself, allowing frequent revisiting without a computer. As a reflector by nature, transcribing the audio and revisiting the written transcripts allows the researcher to reflect on the content and for layered

connections to develop over time. When working on a computer the process feels more compartmentalised and opening up a document or programme to make a quick note or refresh my memory is often not practical. There is a recognition that this could mean multiple connections between themes are overlooked, but for this researcher that was a risk worth taking and one which has been considered in the depth and rigor applied to the paper analysis process. Regardless of the method used, the application of codes for individual participants will allow anonymity and confidentiality to be maintained whilst enabling comments and observations to be compared across the participant group.

Using qualitative methods within a critical realist paradigm allows the researcher to ask probing questions and engage in a level of reflexivity to support a more accurate interpretation of the information gathered and any causal relationships. The use of semi-structured interviews in this research, with a focus on individuals' understanding of the terminology, their own skill level and perception of how helpful any development has been, allows the different domains of reality to be explored, considering not only the empirical and actual domains but expanding this to include the real domain where interactions influence meaning and perception in often unpredictable ways (Roberts, 2014). This allows the critical realist researcher to investigate "what" something is, rather than simply identify how we "know" that (an empiricist's view). Furthermore, qualitative methods such as interviews and focus groups using comparative case studies are used to carry out research in the voluntary sector into leadership as demonstrated by Lough (2021) and Terry, Rees and Jacklin-Jarvis (2020) with the latter emphasising the need for leaders/leadership in the sector to consider both culture and social relationships when identifying the most effective approach within the sector.

Both interviews and focus groups were considered for this research; the inclusion of both would allow for a level of triangulation and the inclusion of more participants and their views.

Focus groups offer an opportunity to engage with the research participants in a less formal and more social setting, allowing the discussion of specific issues. It provides an opportunity to observe interactions between group members and how this may influence opinions and how they are expressed (Saunders *et al*, 2016). However,

the risk of an element of Groupthink being evident, and views not being challenged needs to be considered (Brewerton and Millward, 2004). Whilst it would be useful to have focus groups from each level of LM role within each organisation, this would have created a large volume of data for transcribing and analysis. Identifying the facilitator for the focus groups would also need consideration. The facilitator can influence the group discussion, both in terms of providing direction and identifying discussion points the group may have missed (Currie, 2005; Dawson, 2009). There is also a risk that researcher bias may influence the discussions, so identifying a suitable facilitator, reduces the risk of bias and allows the researcher to observe the participants, adding an additional level of depth to the research process (Brewerton and Millward, 2004).

With the challenges of identifying organisations willing to engage in the research, Covid related restrictions around face-to-face meetings and the move away from the initial plan of a few large organisations, it became apparent that focus groups would not be practicable to run and the decision was made instead to use interviews.

Bell, Bryman and Harley (2022) note a difference between structured and qualitative interviews, noting that the former is used for gathering more quantitative data whilst the latter allows the interviewer to take a more fluid approach e.g. changing the order of the questions or even an unstructured approach such as changing the wording of the questions or speaking to the same person more than once. There are a number of situations where semi-structured interviews are the best choice for gathering data, including the purpose of the research; how important personal contact is within the research; the type of questions being asked and the timescales involved (Saunders, Lewis and Thornhill, 2019). This research is interested in understanding the participants' views and experiences (purpose of the research); the questions are open ended and could result in complex responses (type of questions); and to achieve the depth of information, more time than for a survey response is required (timescales). Alongside this, there may be a need for a degree of flexibility in the wording of questions to allow detailed exploration of individual experiences; it can therefore be seen that semi-structured interviews are a logical and appropriate choice for this research.

These interviews would allow a wider exploration of the meaning participants place on their knowledge and experience as well as providing some consistency in terms of specific areas for exploration whilst allowing flexibility to explore themes related to the core topics which are important to the individual participants.

Saunders, Lewis & Thornhill (2019) raise a range of issues related to data quality, such as reliability, bias, cultural differences, generalisability and validity. The issues of reliability and cultural differences, linked to bias are discussed in the section regarding positionality. Additionally, the opportunity to explore, in depth, participants' specific meanings through semi-structured interviews can further support the reliability of the data gathered. The issues raised around generalisability and validity also need to be considered. Qualitative research can be criticised for a potential lack of generalisability, but as the data gathered is related to the individual and qualitative research is about depth and nuance, rather than statistical data, then the ability to draw conclusions from one piece of research which are applicable in other situations will always be limited. That said, this research accesses participants from a range of different charities from different sectors and with very different aims, so in theory this should increase the potential generalisability or transferability of the findings. A similar view is held in relation to validity, whereby the flexible and complex nature of qualitative research and its desired outcomes means that replicating non-standard research is not feasible. These views are supported by Bell, Bryman and Harley (2022), Richards (2021) and Lincoln and Guba (1994), who note that the concepts of reliability and validity support a realist perspective of single absolute truths and that social science research considers multiple truths. Instead they suggest alternative measures such as credibility using good research practice and triangulation; transferability by gathering rich accounts; dependability through detailed record keeping; and confirmability by demonstrating that personal values or preferences have not influenced the research.

The sampling approach, covered later in this chapter, will attempt to address credibility concerns. Triangulation of this research was limited to checking the views of respondents against each other, since neither additional forms of qualitative nor quantitative research was undertaken. Whilst not ideal, this approach is accepted within qualitative research (Bell, Bryman and Harley, 2022). As noted above, extensive interview notes were taken alongside the recordings, and these provide

further opportunities to support the credibility of the data gathered (Halcomb and Davidson, 2006). The inclusion of ideas and common themes from informal conversations as noted in 4.2 Research Organisations above, also provided an element of triangulation. Transferability requires the gathering of rich data. It can be argued that the initial choice of using a small number of organisations would have limited this aspect of the research but the eventual range of diverse organisations, from different sectors, with different ethos and of differing sizes, will support a more transferable set of data, as does the inclusion of the range of conversations in which the researcher engaged. Records have been kept of dates and times of interviews, details of participants, their roles, time in role and other information relating to their leadership and management experience, supporting dependability. Confirmability has been addressed through a reflexive approach to the research, whereby an awareness of personal beliefs and values has been kept in mind at all points throughout the research process and the data analysis.

4.10 Interview Topics

Deciding on the number and topics of questions whilst considering how much time is needed to complete the interviews can be challenging. Balancing the time taken for interviews to provide sufficient rich data with a timeframe that does not put off participants is a balancing act and one contact said that 45-60 minutes was too long so declined to engage further, although all other participants were content to commit to this. A further consideration was the time required to complete the short online consent form.

Identifying the question topics was based partly on themes identified from the literature review (Saunders, Lewis and Thornhill, 2019); from retained knowledge from wider reading and research that has supported 20 years of delivering training and teaching leadership, management and learning and development; from personal experience of leading and managing paid employees in manufacturing and education and managing volunteers. The pilot, as noted in 4.9.1 above, also influenced the prompts used to expand on the broader topics.

On completing the research and taking an overview of the findings, it became apparent that there were other questions which could have been asked but since qualitative research considers different perspectives, perhaps this is inevitable.

As a critical realist approach is taken, acknowledging the impact of external influences is important (Gill, 2011). Q1 explores the voluntary organisations' understanding and communication of leadership and management as well as that of the participants and this and Q4 (LMD) and Q6 (understanding the skills needed for the role) consider where this understanding and relevant experience/training the participants had received had come from. This was informed by the researcher's experience of teaching leadership and management to different groups and their experiences in a business environment, as well as experience of voluntary leadership and the wide range of literature available on the topics. Q2, about how volunteers feel about the role, was driven by the importance of intrinsic motivation within volunteering, and the link between volunteer satisfaction and retention (Einolf, 2018; Adams, 2023) whilst Q3 asks them to consider how the expectations of the role aligned with any other leadership/management experience as a volunteer or in a paid role. This is relevant to help understand if leading/managing volunteers was different to managing paid staff, again prompted by the literature and the researcher's own experience.

Emotional labour was an element identified for further discussion, based on the pilot interviews and a range of informal conversations mostly from AVM membership and attendance at voluntary group meetings about the challenges of managing volunteers. Understanding how we recruit into roles was explored in Q5 as the literature identifies the link between recruiting volunteers for whom tasks match their motivation for improved volunteer experience and how clear process/documentation supports this (Nesbit *et al*, 2016; Einolf, 2018). The wider literature on management development considers learning through experience as a key part of LMD (Hings *et al*, 2020; Watt, Boak and Gold, 2023) and Q7 considers this as part of a more holistic approach (Stewart, 2009). Participants had all held VVM roles, albeit for differing lengths of time and with some still in post, whilst others had held these roles previously. Q8 allowed them to reflect on the effectiveness of the range of ways they had acquired their skills and what changes they would recommend to make the process more effective and efficient; reflection is an important element of leadership

development (Iszatt-White and Saunders, 2017; Watt, Boak and Gold, 2023) and qualitative research such as this provides an opportunity for gathering the views of experienced VVMs. Finally question 9 allowed the participants to add anything they felt would be useful in the context of the research.

4.11 Thematic Analysis

As noted above, the intention with the analysis was to design the question themes around the literature, anecdotal information and the researcher's own experience. The hope was that the responses from the participants would then broadly align with the questions and any additional information would be discussed under additional themes. Broadly this is how the analysis has developed, although the participants often discussed one theme in response to more than one question.

A thematic analysis provides flexibility and as it is not solely aligned to any framework is useful with a critical realist approach. It allows the different perspectives and experiences of the individuals, linked to the organisational and social contextual factors to be considered (Braun and Clarke, 2006). They identify themes as items which can be frequently discussed and/or discussed in depth but rely on researcher insight to define them within the context of the specific research and their importance to the overall research itself. For under-researched areas such as this, they recommend providing a rich analysis of the data set, allowing important themes to be explored. This approach has been used here, allowing the data gathered through conversations, meetings and other informal sources to support the formally gathered interview research data and using a more theoretical approach to provide a broad view of the whole and also considering the wider external influences on the participants' views. They note that a disjuncture between the questions and the themes is often a positive; although there is a strong link between these here, there is also evidence of variance.

Where responses to questions supported the initial consideration of a theme, e.g. the link between roles/titles/perception, these were scrutinised and developed. Some themes were supported by informal conversations as much as or possibly more than interviews and this reflects the different perspectives, since informal conversations were predominantly with paid staff and interview participants were all volunteers.

Other themes such as the EL and the link between how participants felt about doing the role were based wholly on the analysis as they were not considered a theme when designing the questions. Strong responses here defined this as a theme.

Braun and Clarke (2006) outline a process of six steps, these have been tabulated below to show the process undertaken in this research.

Steps (Braun and Clarke, 2006)	Activities Undertaken
Familiarizing yourself with your data	Personal transcription of the data, noting down thoughts and identifying patterns. Rereading of notes made from meetings, informal conversations where these linked to/differed from the interview participants' views. Considering what could be a code
Generating initial codes	Key terms used by interviewer and participants, initially by question then across the set including informal/anecdotal contributions; checking that everything has been considered. Identifying where the key focus originated e.g. interviews or informally gathered data. Using questions to help identify codes and patterns.
Searching for themes	Colour coding themes, looking at where different terms are used in different organisations but the theme underpinning them is a common one; highlighted on paper and/or on Word documents; reviewing and revisiting, including notes from 6 years of informal conversations, discussions with senior leaders, interview participants. Identifying where a theme arises in response to more than one question; considering what might not be included or is less strongly represented.

Reviewing themes	Mapping the themes and codes and noting sources. Rereading and cross referencing. Identifying any uncoded responses e.g. from Q9.
Defining and naming themes	Specific headings used in analysis; where these link to/differ from the questions and the sources used.
Producing the report	Pulling it all together, identifying relevant quotes, linking to the literature and various primary research sources etc

Table 4.1: Steps and Activities Undertaken for Thematic Analysis (Braun and Clarke, 2006; Nicky Adams)

The analysis chapter provides an in-depth discussion of the named themes and how these developed, and these included expected themes such as definitions of leadership and management, what kind of skills were needed and how these had been acquired and what could be done differently to improve skills. These themes were strongly driven by the interview participants' views. However there were also themes such as the lack of role-related documentation and level of emotional labour required in the role that were unexpected. Some themes, such as emotional labour and the lack of consistent provision were informed by a range of sources, not solely the interviews. Some questions, for example the breadth of organisational use of the terms leadership and management were included purely to provide a contextual basis and related to the researcher's own professional and volunteering experience. The lack of clarity expressed by interview participants about how the organisation used and communicated around these terms and possible wider impact of this was an unexpected theme to emerge from this research.

4.12 Choosing Participants

The first challenge when considering possible participants is access to research organisations and said participants (Saunders, Lewis & Thornhill, 2019). This can be done, as can the research itself, either online or face to face and may involve gatekeepers as was the case with Samaritans. Identifying potential research

organisations, participants and accessing them was an issue which took considerable time and planning to overcome, as outlined elsewhere in this chapter. This led to questions about both feasibility and sufficiency within the research which were overcome by adjusting expectations about the research organisations and a somewhat dogged resolution to achieving a large enough sample. The issue of access to research organisations is documented above; having overcome these, to some extent at least, the next stage is to identify the participants themselves. Saunders and Townsend (2019) discuss probability and non-probability sampling as the first level of choice available to a researcher and note that probability sampling is more suited to quantitative research since it focuses on gathering statistical data. Bryman and Bell (2015) discuss probability sampling and purposive sampling which they identify as a form of non-probability sampling. As this research is gathering qualitative data, one of the non-probability sampling approaches will be more suitable. Saunders and Townsend (2019) outline a range of choices, from purposive sampling where the researcher chooses the participants to a haphazard approach where the sample is based simply on accessibility; Bryman and Bell (2015) consider a different range of types of purposive sampling such as theoretical and stratified sampling, although there is some overlap with approaches such as snowball sampling.

This research has a range of parameters, discussed in depth elsewhere, but broadly requiring the participants to be volunteers with responsibility for leading and managing other volunteers and where those volunteers need a specific set of skills to do their volunteering role. These criteria lead to a purposive sampling choice, since this researcher has identified a specific group of participants within the target organisations. However, there is also a secondary element of self-selection whereby the specific individuals are those who have offered to take part (Saunders and Townsend, 2019).

This mixed approach will have both benefits and disadvantages. Benefits include the limitation of sampling bias from the researcher, particularly within Samaritans where the participants, and potentially their views, may be known to the researcher. Also the heterogeneous nature of the purposive sampling will provide a good range of views and the identification of key themes whilst the self-selection element ensures a willingness to commit time to the research. The disadvantages relate

mostly to the inability to ensure diversity in a number of areas such as time in role and levels of experience in LM roles inside and outside of the voluntary role. With self-selection this is left to chance. Snowball sampling has not been consciously chosen but could be an additional approach used if insufficient participants self-select. The opportunity to carry out stratified sampling, for example where views are taken from people at different levels within an organisation (Bryman and Bell, 2015; Anderson, 2013) would have been a useful approach, however due to the lack of parity in the levels of leadership and management within research organisations this was not deemed appropriate.

Then there is the question of how many is enough? Saunders and Townsend (2019) provide a summary of views offering from 4 to 100 until saturation is reached and Bryman and Bell (2015) and Saunders *et al* (2016) both offer a similar range. For heterogeneous research such as this, between 15 and 60 fits within the majority of parameters, dependent on how many groups are involved. This would support the initial estimate of between 18 and 24 participants overall, roughly between 6 and 8 participants from each of three major organisations, or a smaller number from a larger group of organisations. This is a manageable number from an analysis perspective but also allows an element of flexibility should data saturation be reached sooner, or require more participants to achieve it (Dawson, 2009). This number was initially posited based on discussions with other qualitative researchers, so it was reassuring to see this supported academically, as although qualitative researchers often state how many participants were involved in their research, a justification of the numbers chosen is rarely provided (Saunders and Townsend, 2019). Saunders *et al* (2016) also note the importance of defining the research population as accurately as possible, enabling a more specific identification of the potential sample population. Saunders and Townsend (2019) therefore advise “qualitative researchers should as a minimum provide a clear description of their participants; how and why they were selected and the number; and, of course, how they enable the research question to be answered.” (p.491). Ultimately the number of participants was 16. This was partly influenced by the amount of time it took to secure the 8 interviews from the other organisations, some eight months in total, but saturation had also been reached at this point.

The possibility, or necessity of interviewing staff who are responsible for volunteer management, or for developing leadership and management skills within volunteers was considered and some informal conversations were held with a range of volunteer managers. It became apparent given the challenge of identifying willing participants and the time taken to do this, that to undertake formal interviews with sufficient paid volunteer managers or other staff would not be possible for this research. Pertinent points from the informal discussions will be included in the analysis.

4.13 Summary of Research Organisations

A range of organisations were used for the research. This section summarises the leadership and management structure of the organisations and identifies how the sampling for each was undertaken, along with any factors which influenced this.

Samaritans

As noted elsewhere in this thesis, Samaritans is a charity working across the UK, Crown Dependencies and Republic of Ireland offering confidential support to those in distress or despair or who are feeling suicidal; their vision is that fewer people die by suicide. The service is primarily offered over the phone, but also by webchat/instant messaging, email, face to face and through a variety of outreach activities such as attendance at festivals (Samaritans, 2024). There are over 200 branches and in excess of 15000 volunteers. Branches are responsible for recruiting, selecting, training, supporting and developing their volunteers (listening and support) and with one or two exceptions, all roles, including leadership/management roles within branches are volunteer roles. The UK and Crown Dependencies are broken down into ten geographical regions, Ireland into two regions with Wales and Scotland completing the number. Each region is served by a range of regional officers and some key roles have a functional/organisation-wide lead. All of these are also volunteers. There are four volunteer groups in leadership and management positions, at a mix of Branch, Regional and Functional/Organisation-wide levels. All have a range of both management and leadership tasks, albeit in varying degrees and all are appointed through different processes. In total, eight interviews (participants 1-7 and 10) were carried out with Samaritans volunteers. Eight of these

were in the role of Branch Director whilst the remaining two were in Regional Officer roles.

Other Organisations

From each of the other eight organisations, only one volunteer was interviewed; details of the organisations are below. Some participants asked that their organisations not be named, since they felt due to geography or the nature of the activity this would make them identifiable. Where this is the case, the name has been replaced with the type of organisation.

Interview 8 was with a participant from the Royal British Legion, a charity which supports personnel from the UK armed forces, as well as veterans and armed forces families. They provide a range of financial and other support services to all who have served and remember those who have served in all conflicts since WW1. This participant was involved in the Branch Community service which provided support to veterans in the local community through various befriending activities.

Interview 9 was with a participant from the RNLI (Royal National Lifeboat Institution). The RNLI is a charity whose volunteers save lives at sea (and some inland waters) across the UK and Ireland. 97% of their operational crew are volunteers. The leadership and management roles undertaken here are sometimes shore based but are more likely to be related to managing crew in the boats. This participant was a senior crew member on a lifeboat in S England.

Interview 11's participant had experience within a range of voluntary roles with a number of organisations including the London Organising Committee for the London Olympic and Paralympic Games. The interview focused on their time with a Deaf Action Group which provides a range of support for Deaf and Disabled People's organisations in London and is an active campaign organisation for equality for deaf and disabled people.

ReadEasy was the organisation involved in the 12th interview. ReadEasy is a charity who help adults learn to read. There are a range of volunteering roles involved in the setting up, management and running of groups. The participant here was a Pioneer, a volunteer whose role is to scope out the need for a group locally and to recruit a volunteer leadership team to set up a local group. Once the leadership

team is established the group will recruit volunteers and participants and grow the group within ReadEasy's affiliated structure.

Interview 13 took place with a volunteer from a Church shelter. The organisation had an informal structure with few policies and processes outside those required to provide cover for legal and Health & Safety issues and roles were allocated on the basis of personal relationships or availability. The participant carried out both a paid and a voluntary role at the organisation, often with the roles overlapping. The paid role was that of supervisor for employees and also volunteers whilst the voluntary role involved informal supervision of the volunteers who provided much of the night cover.

A heritage railway was the organisation involved in interview 14. The organisation has over 300 volunteers doing a range of roles from engineering to maintenance to customer facing roles. This participant was instrumental in creating their volunteer role to try to bring some order and structure to the organisation to help ensure that volunteers' skills and interests were used in the most effective way possible.

Interview 15's participant was a lead volunteer in a cathedral. The participant is a member of the Guild of Guides and Welcomers and their role is Chair of the volunteer group of guides within this cathedral. The role is for 3 years and is appointed by a member of the senior clergy based on skills and suitability for the role.

The final interview, number 16, was with a participant who volunteered for a charity that used circles of support and accountability to prevent sexual harm reoffending. The Circles had clearly defined activities/responsibilities that had to be done to ensure adherence to safety and other requirements, but an informal structure whereby circle members would volunteer to take on these tasks for each circle, rotating these responsibilities.

Nine of the participants were from the wider West Midlands area and the remainder were from London, the southeast, southwest, East Midlands and northeast of England. There were ten men and six women participants.

The table below provides further information about the participants and their roles.

4.13.1 Research Participant Table

Participant	Organisation	Title	Role Outline	Role Description?
P1	Samaritans	Branch Director	The role of Branch Director (BD) involves the day-to-day management and leadership of the local branch of Samaritans. Branches vary in size and location, but the role is to ensure that the service is provided in line with the local branch agreement and wider organisational governance requirements as well as provide leadership to the branch. In some branches it may include managing paid staff as well as volunteers, but this was not an area discussed in this research. He is still an active listening volunteer.	There is a role description for this role within Samaritans. Not every BD felt it was accurate or representative of the role.
P2	Samaritans	Branch Director	See P1 above. He still carries out his original volunteering role.	There is a role description for this role within Samaritans
P3	Samaritans	Branch Director	See P1 above.	There is a role description for

			He still does listening volunteer shifts but does fewer of them.	this role within Samaritans
P4	Samaritans	Branch Director	See P1 above. He carries out his listening volunteer role alongside being BD.	There is a role description for this role within Samaritans
P5	Samaritans	Regional Director	The role of Regional Director is to provide support to BDs, to support the dissemination of the policy changes and provide a conduit for communication to and from the Board of Trustees (BoT). Its focus is on making sure things happen and it feels more corporate than it was previously (the participant has held this role more than once). He still carries out a listening volunteer role.	There is a role description for this role within Samaritans but it is lengthy and may be off-putting.
P6	Samaritans	Branch Director	See P1 above. She continues to carry out her listening volunteer role.	There is a role description for this role within Samaritans
P7	Samaritans	Regional Officer	P7 has held a range of regional and organisation-wide roles including	There is a role description for all regional

			<p>Regional Director and Deputy Director in his local branch. This range of experiences was drawn upon in the interview, rather than one specific role.</p> <p>He continues to do regular listening volunteer shifts.</p>	<p>roles within Samaritans although he would challenge their accuracy.</p>
P8	Royal British Legion		<p>P8 volunteers in a new part of the RBL service, Branch Community Service. He has responsibility for 7 volunteers. They are home and hospital visitors and telephone buddies. The role involves receiving the referrals, allocating to the team and being responsible for reporting the activity. He allocates volunteers on a range of criteria e.g. geography, suitability; needs to know team and clients.</p> <p>He has done the role himself and continues to do this alongside his management role.</p>	<p>There is a generic volunteers role description, person spec and guidelines. These have not changed as the role has changed.</p>
P9	RNLI	Coxswain and Helm	<p>This participant is Deputy 2nd Coxswain on all-weather lifeboat and mechanic and helmsman on</p>	<p>There is a role description for every volunteer,</p>

			<p>inshore boat (equivalent to cockswain). Responsibilities vary dependent on boat – so he is responsible for 5 on AWB and on ILB 2 crew. Volunteers can also be crew and work with other crew who are helm as well. Someone will always take charge.</p> <p>He carries out his original volunteering role as well as.</p>	<p>guidance on what is expected.</p>
P10	Samaritans	Branch Director	<p>See P1 above.</p> <p>She does undertake her original role alongside the BD role but does fewer shifts and does not deliver branch training.</p>	<p>There is a role description for this role within Samaritans</p>
P11	Deaf Action Group	Trustee/Chair	<p>There was a lot of similarity in the roles. Voluntary roles included assisting the CEO and board chair in identifying and recruiting other board members; approving annual budgets, audit reports, and material business decisions, in accordance with all legal and fiduciary responsibilities; partnered with the CEO and other</p>	<p>Role descriptions were provided to the volunteer.</p>

			board members to ensure the efficient completion of board resolutions; chairing meetings and acting as group representative to support the deaf residents including understanding issues and barriers faced by the deaf community and liaising with the county council; increasing awareness with social services; organising training for deaf awareness, drop in sessions and setting up a new health watch to improve access to GP and clinics for 500 deaf people.	
P12	ReadEasy	Pioneer	The role entails researching, reporting and identifying the need locally, networking the scope of support for referrals, venues and funding. When the group is set up, she will be responsible for networking, recruiting other volunteers, overseeing a management team of 8/9. She will need to affiliate the group and train the management team before they can start to	The requirements of the role are clearly outlined.

			<p>recruit and train the coaches.</p> <p>She will continue to be a coach herself as well as part of the management team.</p>	
P13	Church Shelter	Co-ordinator	<p>The volunteer role was carried out alongside a paid role which covered complementary activities relating to staff and volunteers. The volunteer role consisted of setting up and organising overnight Shelter teams; populating and maintaining confidential volunteer database; organising volunteer training; carrying out regular supervision overnight in the Shelter of both Shelter teams and clients; motivating and managing volunteers, managing the shelter overnight safely and supporting and supervising clients.</p>	<p>No role description for volunteer supervisor activities.</p>
P14	Heritage Railway	Volunteer Liaison Officer	<p>P14 's role, was designed by him, based on the organisation's need to find a way to manage over 300 volunteers. It is about</p>	<p>Role description in place and based on what he actually</p>

			<p>leadership of other team leaders and how they lead and support their own teams. He supports the “super vols” those volunteers who want to do more.</p> <p>Up until Covid, he was an active volunteer but is unsure if he will continue to do so.</p>	does (he wrote it).
P15	Cathedral	Chairman of the Guild of Guides and Welcomers	<p>P15 will hold this post for 3 years (from 2020). She has been a volunteer for about 20 years at the Cathedral. This is the second time in this post (2004-07). She does none of the admin or task management (a paid volunteer coordinator does this and other clerical work) so does not oversee rotas but does “keep an eye on who is doing what, from a welfare perspective”. She chairs monthly meetings of which ca. 50 volunteers attend from the 70 they have. She would deal with complaints from volunteers, possible issues between</p>	No role description – activities based on direction from senior clergy and observation of what previous post holders did.

			<p>them, negotiate outcomes, sort out training for others, oversees the appraisal system, disputes and liaises over any changes. She also has a role delivering training for Guides.</p> <p>She still does some Guide work (original volunteering role) but less due to her role as Chairman.</p>	
P16	Re:shape	Circle Lead	<p>A circle was at least 5 volunteers and a core member (perpetrator of sexual abuse) there were also regular visits from police and probation services. Everyone was equal within the circle, but there were additional responsibilities around practical things (tea, coffee, keys) and procedural issues. These included safety, anonymity etc.</p> <p>Due to the fact there was no formal leadership title or role, she also undertook her original volunteering role of taking part in a circle for 2 years.</p>	No formal role description but the activities which needed to be covered were clear and documented.

Table 4.13: Research Participant Table (Nicky Adams)

4.14 Ethical Considerations

As noted above, ethics are a key part of any research activity. There are a range of complex reasons for ethical codes and practice within management research (Bell & Bryman, 2007). This area of research traditionally relied on practices from other areas of social research but changes in government-led guidance, governance and funding required management researchers and their institutions to take a more rigorous approach, as opposed to the trust-based practices which had historically been in place. The requirement for rigorous ethical review of research is not however without its critics, who state that such scrutiny reduces academic freedom to research and is driven by fear of legal reprisals. Bell and Bryman (*ibid*) identify issues such as conflicts of interest, power relations, harm, wrongdoing, risk, confidentiality and anonymity as key considerations and identify that in each of the nine ethics codes they examined from a range of academic social research sources, all nine focused on avoiding harm to participants; acquiring informed consent and discussing anonymity. Carpenter (2018) provides a detailed discussion of a number of these ethics codes and Hammersley (2018) adds honouring commitments to the list. Both authors consider the role of values in ethics and the subjective nature of the topic within qualitative research and talks about researcher integrity. Hammersley (2018) goes on to note that there is a difference between the goals of research itself i.e. produce meaningful knowledge and the researcher's motives and that if these motives define the goal of the research, there is an inherent risk that bias results.

Saunders, Lewis & Thornhill (2019) note that ethical concerns may be present throughout the research whilst ethical guidelines provide support in dealing with these appropriately. Assessing these potential ethical concerns from the perspective of Aristotelean virtue ethics allows the researcher to consider where the "vices" or pitfalls may come at each stage of the process and identify strategies to avoid these (Carpenter, 2018). For example, when negotiating access, there could be a risk of partiality or manipulation; a commitment to respectful engagement with potential and actual participants will mitigate or remove this risk.

A review of the project and attendant ethical considerations is required and was carried out in this case through the University's process; no issues were identified

and there were no requirements to meet other organisations' ethical codes. Saunders, Lewis & Thornhill (2019, p.257) identify the following ethical principles. Items 1,2,3,8 and 10 have been discussed in this chapter whilst items 4,5,6,7,8 and 9 are addressed in the consent form provided to all participants. An example of this can be found in Appendix E.

1. Integrity, fairness and open-mindedness of the researcher
2. Respect for others
3. Avoidance of harm
4. Privacy of those taking part
5. Voluntary nature of participation and right to withdraw
6. Informed consent of those taking part
7. Ensuring confidentiality of data and maintenance of anonymity of those taking part
8. Responsibility in the analysis of data and reporting of findings
9. Compliance in the management of data
10. Ensuring the safety of the researcher

The researcher will continue throughout the duration of the research and completion of the thesis to remain cognisant of any potential or actual ethical concerns and address them accordingly.

4.15 Chapter Conclusion

This chapter has identified and justified the research paradigm for the thesis, demonstrating that a critical realist perspective is appropriate for the topic and research and use of interviews as a qualitative method for data gathering. The challenges of identifying research organisations and participants, and then gaining agreement, further impacted by the Covid-19 pandemic, are outlined and discussed in detail. The process undertaken to arrive at the final list of organisations is explored and details of the organisation, the participants and a brief overview of the roles is shared.

The next chapter will provide an analysis and discussion of the data gathered.

Chapter 5 - Analysis of Primary Data and Discussion

This chapter will provide an analysis of the 16 interviews conducted for this thesis, participant details are outlined in detail in Table 4.13: Research Participant Table in section 4.13.1. Key themes from the nine questions will be identified and discussed, alongside the researcher's own experiences of leadership and management in a volunteering role, and any relevant skills development undertaken in this role. Participant anonymity and confidentiality is important and as such, some quotes have not been used as they would have compromised this for participants.

Additionally, information from a wide range of other primary sources will be used to support this, taken from a range of face-to-face and online interactions. These informal conversations helped shape the survey questions and also informed future conversations. Notes from these were intentionally brief since they were not formal interviews. They were held with other volunteer managers (mostly paid staff) during conferences, online learning events and AVM Connect events (where two members are randomly paired up to discuss volunteering issues important to them) hosted by the Association of Volunteer Managers (AVM); informal conversations with other voluntary sector researchers and practitioners at VSSN (Voluntary Sector Studies Network) events; attending meetings of local voluntary umbrella organisations in the West Midlands and follow up conversations with contacts from these; informal conversations and experience sharing with Branch Directors, Regional Officers, other Senior Volunteers and staff members at a variety of Samaritans' regional and organisational events. Two senior contacts within Samaritans consented to informal conversations about leadership, management and volunteering; thought leaders in the sector also kindly spoke to me about their experiences of leadership and management in the voluntary sector and a volunteer manager from Crisis shared her experiences of working with lead volunteers with me over the course of three years. As these conversations were not formal and only outline notes taken, very few quotes are provided to support these.

The use of such informal sources, referred to as 'participatory' conversations by Swain and King (2022), can be a useful addition to the structured research and is, they suggest, underused in qualitative research. A participant in these conversations can be seen as "an agent of influence in the study but not a main player".

Additionally, the researcher, as noted in Chapter 1 (Introduction), has been a volunteer with Samaritans for around 30 years and held a range of senior volunteering roles with varied leadership and management responsibilities. Therefore, the researcher's own views will be considered alongside those of the other participants and contributors to the research.

The interviews consisted of 9 questions which are available in Appendix G which broadly outline the key themes to be explored in the research.

5.1 Early Conversations

As outlined in Chapter 4 the initial wish was to carry out research within a small number of larger charities which are primarily volunteer-led and also where the volunteers were involved in a range of complex or challenging voluntary activities. Initial contact was made with the RNLI and Scouts but as outlined in that chapter, these discussions did not lead to involvement in the research at an organisational level. However those initial discussions did influence some areas which were later investigated in this thesis.

Common themes from both organisations were the need to develop the right LM skills in volunteers and finding the best way to do that was a significant part of the challenge. Identifying relevant competencies and ensuring ongoing skills development were two other areas which both identified as important. Scouts felt a clear volunteer journey and route into LM roles with consistent support was important, including how this was offered both to volunteers interested in developing the skills to take on LM roles and to those volunteers with existing LM experience, whether from inside or outside of the organisation. As will be seen from the remainder of this chapter, identifying existing skills, the best way to develop volunteers' LM skills initially and in the longer term are themes which were common amongst the organisations involved in the research.

5.2 Theme A - Role Titles and Descriptions

This theme was predominantly drawn from the interview participants many of whom had strong views about the quality or lack of supporting documentation provided by their organisations, an experience shared by the researcher. However, informal data from conversations with volunteer managers also identified a lack of clarity and consistency across the wider sector relating to this theme, not just in relation to documentation but to the idea of senior or lead volunteer roles themselves.

Role titles, like job titles in the workplace, can vary considerably. In the workplace there is generally a tendency/preference to provide some element of acknowledgement within a job title where any supervisory, management or leadership role or activity is required. With volunteers, this is less common and, in some instances, terms relating to these activities are actively avoided. Reasons heard by the researcher for this over the years are concerns regarding professionalisation of volunteering; the risk of legal implications if workplace terminology is used; the terms discouraging people from applying or taking up roles and Jäger, Kreutzer and Beyes (2009) support this view. Professionalisation of volunteering, driven by the need to increase efficiency and effectiveness in the sector, can lead to an increase in the use of business practices in the sector (Nesbit *et al*, 2016; Khan, 2020) although this approach can cause friction for volunteers (Rosenfeld and Wilson, 1999; Kreutzer and Jäger, 2011; Einolf, 2018). It does however reflect the predominant use of a best-practice HRM model when managing volunteers, an approach which is recommended by Nesbit *et al* (2016) but is not always felt to be appropriate (Einolf, 2018; Terry, Rees and Jacklin-Jarvis, 2020).

Within Samaritans all key roles have a centrally agreed role title e.g. Branch Director, Regional Training Officer although this does not necessarily include the terms leader or manager, the title Director would usually confer some level of wider responsibility in these areas. In one organisation, the leadership activities were shared amongst a group of volunteers, dependent on availability or skill and this could be done either formally or informally, in a distributed/shared leadership approach, considered effective and applicable in the voluntary sector (Terry, Rees & Jacklin-Jarvis, 2020) Here, there was no specific role title to identify whose responsibility these tasks were, reflecting the equal standing of all volunteers. Elsewhere the lack of formal

title reflected a lack of structure around volunteer roles and the need for leadership and management tasks to be undertaken by them. More formalised titles such as Chair were also used. In one organisation this was a reflection of its hierarchical and structured nature. A different organisation felt the impact of its hierarchical beginnings with a resistance to the use of the term 'lead volunteer', in spite of the fact that volunteers undertaking additional roles with elements of leadership and management was common practice. This term is now used alongside team leader and other specific titles from the sector. Some titles were specific to the organisation, such as Pioneer, reflecting a specific role at a point in time, such as leading the start-up of a group, taking on responsibility for both governance and building and leading a new team; or a set of technical skills required to do the role, such as Cockswain on a Lifeboat. In some organisations, the role title no longer reflected the role done, and this was often due to a role that had changed, and in both cases noted here, the change was driven by the interviewee themselves.

The reluctance both to identify and title lead volunteer roles became apparent over about 18 months of interaction with the Association of Volunteer Managers (AVM). This may reflect the concerns noted above regarding professionalisation of roles and activities within VSOs. However it is also apparent there is a lack of clarity with paid VM role titles too. Whilst some may have the word manager as part of a job title, others will have the word coordinator or supervisor. Also the role itself can differ in different organisations, with some managing volunteers directly and others managing volunteer coordinators, who may be volunteers or paid staff. For them, this lack of consistency added to the issues of providing ongoing development for VMs. If the word manager does not appear in someone's job title, they are often excluded from management training and development.

The same difference was evident in how VVM roles are titled, but it was unclear if there was a similar impact on their accessing development. Most AVM members are paid staff who manage volunteers and at several meetings and events where changes in volunteering, particularly post-Covid-19, were discussed it was apparent that asking volunteers to take on more responsibility such as leadership/management tasks/roles was seen as problematic by many and risked the perception of job substitution (Greene and Ward, 2016). Some organisations already had lead volunteers and others were developing these roles and were

seeking support and information from those who had experience of this. Some Volunteer Managers (VM) recognised that such roles could bring additional skills and capacity to their organisation and were keen to develop roles. Other VMs were concerned about managing issues such as appropriate recruitment, selection, training and role rotation amongst their volunteer groups whilst others spoke of an organisational resistance to asking volunteers to take on these roles.

From the informal conversations with specific VMs, one identified that they recruited volunteers to senior roles with specific skill set requirements although they were now investing in training and developing all their volunteers (about 40% of their total headcount) to support the implementation of and commitment to their new strategy. One paid VM in a retail environment said that their volunteer teams were all staff-led bar one, where the volunteer had more knowledge in that area than staff. These VM roles were however mostly task focused rather than people focused. Although the existence of job descriptions or competency frameworks did not come up in these informal conversations, most organisations will provide one of these or some other form of formal documentation as part of their recruitment and selection process for paid staff (Marchington *et al*, 2021; Leatherbarrow and Fletcher, 2018) so it is not unreasonable to assume that this was the case for these paid volunteer managers.

This stark difference in views is not uncommon and could be a justification for providing a stronger alignment between volunteer management and HR management practices (Nesbit *et al*, 2016). In some organisations these lead volunteer roles had developed in a reactive way and it was recognised that this lack of planned and structured development was a potential additional issue. Whilst searching for suitable participants, the researcher outlined the requirements to the Volunteer Development Coordinator at the University, whose initial response was that volunteers should NOT take on leadership and management activities and roles, that was the responsibility of paid staff. Jäger, Kreutzer and Beyes noted this issue in 2009 and it would appear that this reluctance is still widespread and further investigation to understand these reasons may enable roles to be developed and utilised more consistently across the sector. Given the issues outlined above, it is perhaps unsurprising that there is no consistent provision of role descriptions for such volunteer roles.

All Samaritans key roles have a centrally agreed role description to match the role title, although views differed regarding how accurate and representative of the roles these were. Some felt the descriptions provided minimal information about the role, some that they were inaccurate and not up to date whilst others thought they were relatively successful in communicating the breadth of the role. The role descriptions mention leadership and in the case of the Branch Director, management as well, and participant perception of the balance of these within the actual role varied across the interviewees.

In other organisations, there was a wide variation in the existence of role descriptions. Although participants were asked to provide an example of a role description, only two were provided for the researcher, one from ReadEasy which was a role description and person specification for the pioneer role, and the other from the heritage railway which P14 had written himself and consequently reflected his role accurately. These documents and their contents were discussed with all participants. In some organisations (RBL) the role description was felt to be generic and out of date with how the role had developed. Others (RNLI) had up to date, detailed role descriptions for all roles and felt that these provided a useful guide to all volunteers about expectations and responsibilities. They were also used to help support the skills and knowledge required to carry out these roles, setting measures to be achieved for those already in and/or aspiring to such roles, an element of good practice (Nesbit *et al*, 2016; Terry, Rees & Jacklin-Jarvis, 2020). Here they formed a part of the wider LMD strategy within the organisation.

In some organisations, role descriptions were provided for some volunteering roles such as trustees but not lower-level leadership/management roles. In one organisation, the role descriptions are designed with the input of other lead volunteers and aim to accurately reflect the role, its responsibilities and skills required (heritage railway) although this was driven by the VVM himself rather than by the Trustees. To some extent the availability of role descriptions is related to organisation size; most of the larger organisations had role descriptions even if they were not as up to date as they could have been, whilst smaller organisations relied on a more ad hoc approach with volunteers picking up tasks as required.

This demonstrates the significant variation in practice across voluntary organisations in relation to formalising and documenting volunteers' roles, particularly those involving leadership and management skills and may be a reflection on the resources available to provide these kinds of documents. It may also be a reflection of the lack of priority given to such documentation across the whole organisation, as noted above this can be reflected in paid VM role titles as well; it could be related to confusion regarding these roles (Nesbit *et al*, 2016); or done to avoid labelling roles and activities which may be too aligned with volunteers' paid workplace roles (Freund, 2017) or as noted above, a reluctance to professionalise roles. Having a clear understanding of the role results in volunteers volunteering for longer and feeling more satisfied and provides better volunteer management so some formalised documentation could improve attraction and retention of VVMs (Nesbit *et al*, 2016; Einolf 2018).

5.3 Theme B – Organisational and individual understanding of Leadership and Management

This theme was drawn almost exclusively from the participant interviews although the discussions with senior leaders and some informal VM conversations reflected the same lack of clarity. Again, this reflected the researcher's own experiences.

The first question explored the meaning of the terms leadership and management for the participants, both personally and in relation to their organisation. Although this was discussed in terms of their volunteering role, the influence of previous experience of paid, workplace roles carrying out similar activities, or being led/managed in the workplace was evident. Everyone agreed that leadership and management were different, with the majority of participants offering their view of these differences. Many noted that leadership is more visible than managing; leadership is about vision, inspiration, taking others with you and reassurance, whilst P7 noted it was about "facing the direction of travel" and P8 felt a leader "serves the group" - perhaps a reflection of their previous role as a serving member of the armed forces.

Other common themes were about leaders pushing ideas forward and supporting the team. P15 who volunteered in a religious setting, noted their role was to "lead and

gather the flock”, reflecting again the link between volunteering, leadership, individual experience and organisational context. These views align with concepts such as Servant Leadership (Greenleaf and Spears, 2002) as well as Mumbi and Obembe’s (2022) view of shared leadership and its place in the voluntary sector and with Gill’s (2011) wider view that leadership is about engaging with and supporting others. As there is no traditional power relationship between volunteers and their leaders/manager, leading volunteers is particularly reliant on relationships according to Jäger, Kreutzer and Beyes (2009); Posner (2015) and Nenn (2023). In contrast, the view was that management is more about command and control, organisation and how to do things better. There was a stronger focus in participants’ descriptions of the operational, task and process and risk management aspects, with P12 summing it up as “making sure things happen”. P7 felt that “The structure of the organisation creates an administrative hub at the branch director's point...therefore, branch directors frequently end up being management administrators.” They felt that offering administrative support would alleviate this in a positive way and support more leadership “people who could be leading and would make so much more difference if they were leading get bogged down in management administration” This supports the view that managers provide structure and process within organisations (Robbins, Judge and Campbell, 2017) including in voluntary sector organisations (Kreutzer and Jäger, 2011). Samaritans’ participants P3 and P10 both observed that the difference in how branches structure their leadership teams makes it practically impossible to provide a clear view of how much of the role is leadership and how much management, a view which reflects the researcher’s experience.

This could also be seen as a reflection of Mintzberg’s view that the two skills are necessary and complementary (Buchanan and Huczynski, 2019) and Yukl and Lepsinger’s (2015) view that integrating the roles is essential for organisational effectiveness. Others such as P7 noted that skills like delegation are important. This researcher would also identify that the team members’ levels of skill, ability and commitment also contribute to the ability to delegate effectively, identifying the importance of the role of followers (Harrison, 2017; Laasch, 2021). Participants from other organisations acknowledged that their roles included aspects of both leadership and management but only P14 discussed the differences specifically in relation to roles in their organisations and their own role “I think they do a mix. I think

that in terms of things like setting up rotas, so you know, like the shop's team leader, knows the operating days when they need people to be in the shop. And so they would actually then manage that rota for setting those up in terms of leadership". Perhaps the most relevant comment was from P1 who noted he had held paid roles with responsibility for 100s and sometimes 1000s of employees, that the role of Branch Director is equally as challenging and "you need a lot of leadership and management skills; I am not sure we select our Branch Directors specifically for those skills".

In spite of the wide range of voluntary organisations and roles across the participants there is a clear distinction in how the terms are perceived and then applied. This broadly aligns with the academic discourse that management is about planning, organising and control whereas leadership is more about influencing others (Buchanan and Huczynski, 2019; Robbins Judge and Campbell, 2017; Harrison, 2017). However Mumbi and Obembe (2022) and Terry, Rees and Jacklin-Jarvis (2020) note that in VSOs leadership is often more complex than in business environments due to the relationships between paid staff and unpaid volunteers/trustees. Given that 13 of the 16 participants had leadership and management responsibilities in paid roles (albeit with varying levels of experience and role titles) and some had received training and development commensurate with these roles, it could be assumed that this agreement in the terminology is driven by workplace experience and training. One participant (P9) had run his own business from an early age but had received significant training in his volunteering role.

The two participants who had not had a leadership or management role/responsibilities prior to taking on their VVM role (P3 and P5) still both expressed the same broad views on the definitions of and difference between leadership and management, indicating how pervasive these definitions are in society generally. P3 had held a Deputy Director role prior to becoming Branch Director and had been in role for two years at point of interview and P5 had held his first Branch Director role about 30 years ago. It was therefore not clear if the views of these two participants were influenced by training or experience in volunteering or paid employment. Both P3 and P5 advised in response to Q4 that they had been able to use their experience to support their paid employment career development, showing how

volunteering can contribute to personal career progression, in line with Gee's (2017) views on the duality of an individual's career.

The views on how the organisation uses the terms leadership and management were considerably more varied than the individual views. A senior volunteer at Samaritans Central Charity, K, noted that management in organisations is about process and identified lack of leadership as a potential issue for all organisations although context can influence this. Jäger, Kreutzer and Beyes (2009), Einolf (2018) and Terry, Rees and Jacklin-Jarvis (2020) discuss the challenges of good leadership within the sector while Ivanovska Hadjievska, Johansson and Altermark (2023) note that not only is it difficult to attract and retain skilled leaders, but that there is also a need to nurture and develop the next generation of leaders. Where volunteers feel their leadership experience is not valued by the organisation, they are less involved in leadership roles and less engaged (Mumbi and Obembe, 2022) highlighting the importance of understanding what skills and experience volunteers bring with them.

Views within Samaritans' participants varied regarding how, or even if, the terms were used with P1 stating the terms are not used, rather there is a focus on collective working, whilst P2 felt they were used centrally and at Branch level. All remaining Samaritans' participants believed that organisationally both terms were used and considered to be different, but the application is far from clear or consistent, with one participant commenting that he felt the terms may not be used consistently in relation to staff and volunteers. The terms were used interchangeably and not clearly differentiated, with P5 saying that this can "muddy the issues" and P10 felt the terminology was muddled. P6 felt that the term leadership was mostly used, but that the role requires management skills as well. Interestingly P5 and P7, both of whom have significant experience in volunteering roles above the level of Branch Director, as does the researcher, identified that the organisational aspiration is to focus on leadership but the requirements of roles such as Branch Director force a management approach with limited opportunities to engage in leadership activities. This strongly reflects the researcher's own experience and view of the role of Branch Director and is supported by a wide range of literature on the topic as noted in Chapter 3. There is clearly a difference of perspective across these participants of the organisational expressions of leadership and management and how senior volunteering roles evidence these. Some participants also felt there was a lack of

consistent messaging and wider organisational clarity on leadership and management that may not be limited to volunteering roles.

With other participants, the views were equally as broad. Larger organisations tended to be much clearer about the distinction in terms of both usage and function and K (Samaritans Central Charity volunteer) felt that large staff charities often function similarly to public sector organisations in that they are process driven; Mumbi and Obembe (2022) reference this more formalised approach in their work. In contrast, large volunteer delivered organisations need volunteers to do the wider tasks and, often, critical roles. According to K, this leads to volunteers being “entitled to have a say” because they are committed to the values and beliefs of the organisation. Taking on senior roles becomes more challenging because those who have senior roles in their paid jobs may not want to take on such roles in their volunteering. However, the need to build capacity and consider succession planning are critical (Freund, 2017).

Volunteers P8, P9, P12 and P15 were all involved in organisations which they felt differentiated management and leadership very clearly and provided support in the areas as needed, albeit not always consistently with P8 noting that the pace of change in the organisation meant more leadership training was needed and although it was planned, it had not yet happened which is not uncommon (Ivanovska Hadjievska, Johansson and Altermark, 2023).

Smaller organisations had less clarity and there was little or no distinction made between the terms. This was very obvious in the organisations where P11 and P13 volunteered with both confirming this lack of clarity. In contrast, P14’s organisation was working towards a level of clarity so that volunteers had a better understanding of responsibilities attached to different roles and skills needed. Currently the differentiation is in terms of delivery rather than the language used, again influenced by the sector, reflected by P7’s view on the importance of language “But, you know, actually, I do genuinely believe that if we get language right in the organisation, it's easier for us to align people with values and culture because and it's easier for people to understand what's going on.” Due to the nature of the work of P16’s organisation, and the distributed leadership model they used, the term leadership was not used, but there was a strong focus on risk management, which formed a

critical element of their work. Although it is less surprising that smaller organisations made fewer distinctions, it was unexpected to see the lack of consistent messaging and clear evidence expressed by participants in larger organisations.

Overall although individual participants had clear and strong views about the differences between leadership and management and were broadly in agreement that management is about task and process and leadership about direction, change and people, organisationally this distinction was perceived by the VVMs to be less clear. It can be seen that without clarity here, identifying the skills needed to be effective as a VVM will be difficult to accurately identify; potentially discouraging others from taking on such roles (Nesbit *et al*, 2016; Einolf, 2018; Mumbi and Obembe, 2022).

The views on leadership and management expressed here broadly support those explored in Chapter 3. This is likely to be because almost all of those interviewed have experience working in leadership and management roles in a paid capacity and received some informal or formal LMD, however it can also be seen that research into leadership and management in the voluntary sector identifies that a different approach to traditional leadership and management models is required.

5.4 Theme C – Views and feelings about the role

As this was specifically related to how the VVMs felt about their role, this was informed solely by their responses.

Participants shared a wide range of views on the role itself. Given that volunteer motivation is agreed in the literature to be intrinsic (Adams, 2023), understanding how VVMs feel about the role was felt to be significant. Much of the literature in the voluntary sector, as in business, seeks to identify traits of good leaders such as charisma, vision, humility and resilience. There is also an expectation leaders have a high level of emotional and cultural intelligence, leading to a risk one has to have “god-like status” (Terry, Rees and Jacklin-Jarvis, 2020). It could be argued that this expectation – actual or perceived – may lead to volunteers not putting themselves forward for leadership roles, thus impacting on succession planning and diversity. Often the expectations and responsibilities are significant as a VVM, and P2 felt that

managing volunteers as a volunteer has to be different from managing staff because volunteers can vote with their feet more easily than an employee can. A meaningful and challenging role which supports the aims of the organisation and utilises volunteer skills and experience appropriately, leads to volunteer satisfaction and retention (Einolf, 2018; Mumbi and Obembe, 2022) indicating the importance of the VVMs' feelings about the role itself. As specifically noted by P6, as a volunteer "they don't have to be there". This is equally true for VVMs, as noted by P9, "you don't have to be there; you choose to be there" and this is significant since the role may impact on the individual's ability to engage in the original volunteering role.

The most prevalent view was how many participants loved or enjoyed the role, and for whom this was the main response. This contrasts directly with research by Nesbit *et al* (2016) on employed inadvertent volunteer managers, where the lack of value placed on volunteers and their management often led to these volunteer managers taking on the role without any training and risks burnout and dissatisfaction. This difference probably reflects the difference in engagement and motivation for between a paid and voluntary role, as noted by P6 and P9 above. In total six participants said this, with one participant (P12) saying it was a privilege to hold the role, whilst P10 wanted to take on a further role and P6 said she would have happily stayed on longer in her time-limited role. P3 said "it is the best thing in the world" but commenting on the commitment said he had "two full time jobs, but one that pays the bills". Motivation was identified by P14 as key, "being needed by the XXX is probably something that motivates me to quite a large extent because I have been there a long time now." The importance of personal learning gained from the role alongside making a difference was identified by P7 "I did feel stretched...I questioned myself quite a lot, you know, so yes, I loved it for those reasons because it was I was learning an awful lot. I was being stretched and I loved it because I felt I had a real chance to make a difference." This shows that managing the content of these roles is key. Three participants' first response was that it was challenging in some form, noting issues such as lower skill levels and lack of volunteer commitment as particular issues; P4 commented that it was "like helping people dance on the head of a pin" as there was so much to consider and so many differing views to take into account. The importance of the role, the responsibility of leading and managing volunteers and the need to be approachable with a range of skills was the main point

for four participants. For two of the participants the role was a privilege and a humbling experience which had provided confidence. P8 found the role easy and mentioned the type of person who volunteered was a significant contributory factor. As he volunteers for Royal British Legion and volunteers are ex-service personnel, it could be suggested that the common purpose with such a strong shared background is a key factor here.

Almost all participants commented on other factors – some noted there were challenges, although these could be out of their control and this was not their main response. Other comments were about the volume of knowledge required to do the role and also about the impact of learning, experience and leadership style on how the participants felt about the role, a common theme in the literature (Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022; Freund, 2017; Nesbit *et al*, 2016; Posner, 2015; Jäger, Kreutzer and Beyes, 2009).

Many of these views chime with the researcher's own experience as a VVM. The role is a privilege but comes with significant responsibilities and is complicated by the range of volunteers, their skills and motivation for which the VVM is responsible. Leading and motivating volunteers presents specific challenges due to the intrinsic motivation of the volunteers (Smith, Callaghan and Fellin, 2020; Adams, 2023) and it is clear that these VVMs recognise this in their roles.

5.5 Theme D – What the role is all about

This theme was informed by participant responses and supported by the researcher's own experience and views.

Although the participants were all asked about the expectations of the role, there was a distinction between the Samaritans VVMS and those in other organisations. All the Samaritans VVMs were able to articulate what the role expected, but only two of them (neither currently in the role of Branch Director) focused on the practical aspects of this in the interview. The remaining six focused far more on the challenges the role brought, particularly in relation to volunteer management, which led naturally to discussing the level of emotional labour required to manage volunteers and whether this was significantly different than that required for

managing paid employees. With the remaining eight participants, six of them had a much stronger focus on the practical expectations of the role and only P13 (homeless shelter) and P16 (rehabilitation) focused more on the people management relationships.

This could reflect the difference between roles where there is direct responsibility for the volunteers (Samaritans) and where the focus of the volunteering has a significant emotional content (P13, P16). Volunteers demonstrate emotional labour when engaging in different aspects of being managed (Miao and Yu, 2023) but so do volunteer managers through a more relational approach (Jäger, Kreutzer and Beyes, 2009; Posner, 2015; Nesbit *et al*, 2016; Ertas, 2018). Ertas (*ibid*) also comments on the dual aspects of the VM role, internally engaging with volunteers and externally with community and other organisations, makes VMs “without question the greatest asset of many nonprofits”. She goes on to say that turnover of these staff could be expensive for organisations, and although VVMs will not be paid, there is a cost to the organisation if associated tasks are not completed, a cost involved in recruiting and training replacement VVMs and potential wider organisational issues if the delivery of core services is affected.

As discussed above under Theme A, there were not always explicit distinctions between expectations of leadership and management activities in the interviews but applying the view that management is about process and leadership about the people, all participants discussed elements of both within their role. P3 saw their role in this way: “I saw my job as long as someone wants to come and do a shift at my branch, my job is...to keep it open, keep it running” by dealing with the management activities and supporting and engaging volunteers. P6 views her role as being a custodian to ensure continuity of the service whilst P4 felt that there was an element of dealing with the unknown that made the role more challenging. There was also a focus on leadership specifically within the role from P7 who felt “there was a sense of a need to lead all volunteers in the region towards certain specific organisational milestones, as well as leading them in value terms, in you know, in cultural terms.” Both P9 (RNLI) and P12(reading) focused heavily on the practical processes (management) involved in the role, however this could be driven by the need for safety and newness of the group respectively. P12 noted that the role was similar to paid roles he had held but that things were more relaxed with volunteers in

terms of expectations. Knowledge and experience were key to gaining respect in the role according to P14 (heritage railway).

The researcher's experience is that the information about the requirements of the role within Samaritans is incomplete and does not adequately reflect what is required. The role requires both management and leadership but how these are balanced/required is dependent on a range of factors relating to the sector, type and size of the organisation as well as the volunteers and their skills. This is a view supported by other participants. As noted elsewhere in this chapter, lack of clarity can have significant implications for engagement and retention. The participants comment on the need for both management and leadership in their roles and this is in direct contrast to much of the literature which discusses management and leadership as separate disciplines. Whilst there is clearly a difference between the two terms, researching them in isolation when they are in fact carried out in tandem seems to be unhelpful. Jäger, Kreutzer and Beyes (2009) noted there was little research in volunteer leadership compared to volunteer management, this has changed in the intervening years with a focus on shared leadership but how management activities sit alongside leadership activities, as demonstrated in this research, is not really explored.

5.6 Theme E – Emotional Labour in VVM

This theme was equally as strongly represented across all elements, participant interviews, the participatory conversations with senior leaders and the informal conversations. Paid VMs frequently articulated the challenges they faced due to the lack of wider organisational understanding regarding how different it is to manage volunteers rather than staff. These views did not change over time, perhaps providing additional weight to this perspective.

Emotional labour (EL) is a concept recognised in many fields, particularly healthcare, where an individual manages their emotions in a way that is either prescribed or recognised as appropriate within that context (Guy-Evans, 2023). The individual will present an emotional response in a situation, or to another person that does not necessarily reflect their emotional reality, for example being polite and pleasant to rude customers. This is a common requirement in leadership and management

roles, although it appears to be considered more frequently from an employee perspective rather than specifically for those managing and leading (Ertas, 2019; Lu, Zhang and Jia, 2019; Farr-Wharton *et al*, 2021). Emotional labour includes both surface acting, where the true feelings are hidden and deep acting, where thinking is adjusted to align with the emotion felt (Ertas, 2019; Lu, Zhang and Jia, 2019) and both they and Farr-Wharton *et al* (2021) note the negative impact of surface acting on wellbeing. Ertas (*ibid*) notes that although there is research which identifies the outcomes of surface acting, from which it could be hypothesised that EL might impact staff decisions to leave, there is little work on the effects of EL in volunteering or volunteer leadership and management.

Participant views on the level of EL required to manage and lead volunteers were in agreement apart from P8 who felt there was no difference in this, although as the volunteers are all ex-service personnel, that may explain this outlier. P7 was unsure about this as was P12 who was not yet managing volunteers but suspected it would be higher than with staff. One paid VM in conversation agreed that managing volunteers was different from managing paid staff, with different boundaries and the processes being less formal. Another VM whose work was in conservation observed that volunteers often had significantly more knowledge than he did, leading to a distinctive change in the power dynamics in the leader/follower relationship. In his organisation, volunteers can move into paid management roles and he wondered if they are more empathetic towards volunteers when they take up these roles.

The remaining participants agreed that leading/managing volunteers required a higher and sometimes different level of EL. The need to provide more, and more overt, appreciation was identified by P1 and whilst P2, P3, P7, P9, P11, P13 and P14 all commented on the need for different approaches to lead and motivate volunteers since pay was not a factor in people being there and this provided the richest quotes. P5 felt it takes “heaps more EL to manage volunteers” with P4 noting it can be “like shovelling fog up hill – hard to do”. P1 said it could feel like “treading on eggshells”. Nesbit *et al* (2016) note that volunteers are “sensitive to interpersonal issues in their volunteer work”, whilst Green and Ward (2016, p.36) say managing volunteers can be “difficult, uncomfortable and trying”, supporting these views. P1 also noted the need to be “more careful, more nurturing” and P3 felt that one difference is that when managing volunteers “the distance you have from it is a lot

smaller” because you too are a volunteer. There is a need to be more “aware of the fragility of the situation” because if outside life gets too much, they will leave and “the fact they don’t have to be there is a real thing” were P6’s views. The importance of a different approach was raised by P14 “it is more about...persuading and bringing people on board rather than telling them this. Yeah, I think, you know, with a team of volunteers now, it can be like herding cats. And so you don’t tell them you persuade them that, if possible, persuade them it was their idea.”

This also links to both surface and deep acting. Surface acting may be required where the volunteer requires the higher level of appreciation to be motivated, but the VVM may not feel the level of appreciation required is commensurate with the volunteer’s output or contribution, requiring additional energy and ultimately the risk of burnout (Ertas, 2019; Lu, Zhang and Jia, 2019). A similar observation is made by Greene and Ward (2016) where managers felt they had to treat volunteers differently from paid staff. However, where deep acting can be applied, and the VVM can engage with the emotions that support a higher level of appreciation, this could provide a more satisfying experience (Ertas, 2019; Lu, Zhang and Jia, 2019). The impact of this on the VVM themselves was summed up by P10 “It’s quite draining and it’s upsetting in a different way because that person is trying to do a good thing by volunteering. So you feel bad because you feel they’re giving up their time, they’re trying to help others, and you’re basically having a go at them. Whereas in the workplace I’m paying you and you’re not doing what you’re meant to do.”

This researcher’s personal observation is that the challenge with leading and managing volunteers is that their individual expectations can be very different. When engaging with a range of volunteers with different expectations, both surface and deep acting take a significant emotional toll as VVMs may find themselves having to change and adapt from one set of feelings to another in quick succession, in a drive to “connect with and understand people” (Nesbit *et al*, 2016).

P9 believes volunteers have a different relationship with you in a LM role, preferring to share things with a fellow volunteer rather than a paid staff member, seeing it as talking to someone on the same level as they are even if you are technically in a “higher” role as a VVM. That said, he approached his role on the basis more of friendship than a hierarchical relationship because “you don’t have to be there; you

choose to be there”, a view supported by P11. This aligns with a view that a collaborative or shared leadership approach, where skills such as influencing, relationship building and managing are important, is effective in volunteer management (Jäger, Kreutzer and Beyes, 2009; Freund, 2017; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022; Ivanovska Hadjievaska, Johansson and Altermark, 2023). P13’s opinion was that although you can insist on the legal basics, everything else must be done by building relationships and people skills which takes a lot more emotional energy, a view supported by Nesbit *et al*’s research (2016) and by Posner (2015). P14 and P15 discussed the motivation of individual volunteers in managing them effectively and as with P13 noted the additional energy this can take. P16 took this thought further and considered how values keep a volunteer with the organisation but also that the EL involved in dealing with issues means that dealing with issues can be uncomfortable and they may not be dealt with as swiftly as they would be in the workplace. P9’s view was “Volunteers are there because they want to be there. They are always really keen to learn...some of them join and don’t realise how much is involved...and they don’t stay for that long but then you get the ones that love it”.

This contrasts with informal conversations with senior volunteers and other VMs also highlighted that the cost of volunteer turnover and things not going to plan has an impact on motivation and enjoyment, adding to the EL burden. Examples given were of volunteers not completing training, often just not turning up, or not doing tasks they had committed to doing. Whilst this may have a financial cost, for volunteers the direct cost is emotional and motivational with volunteers becoming disillusioned and burnt out and potentially stepping away from critical roles. This was noted by P14 who felt there was a distinct difference in volunteers managing volunteers compared to staff managing them “I think that there are different pressures. And sometimes I think the unpaid, the volunteer volunteer leader, has more pressure sometimes.” If these things happen in the workplace, pay can sometimes be a compensation for these challenges but not for volunteers.

The increased sensitivity in dealing with volunteer-related issues is echoed by Jäger, Kreutzer and Beyes (2009) albeit not explicitly linked to EL.

In an informal chat with an experienced VM, author and trainer in the sector, he said he felt volunteers had “unsalaried credibility”, a view supported by a VSO CEO who commented that volunteers provide an unfiltered view of events and reflected by Greene and Ward (2016). It can be seen then that “volunteering is a value-based and emotional activity” (Haski-Leventhal and Bargal, 2008) and consequently a lack of clarity around managing volunteers can cause burnout (Nesbit *et al*, 2016; Ertas, 2019). Nesbit *et al* (*ibid*) note this leads to higher turnover in paid staff; there appears to be no equivalent research into the impact on VVMs although Greene and Ward (2016) comment on the challenges being faced by paid VMs. Given that volunteers are often more committed to the organisation, with a VSO CEO commenting that volunteers make “a new choice to be there every day” there is a risk that they would suffer from higher levels of burnout and leave either their VVM role or volunteering completely (Nesbit *et al*, 2016). The need to consider volunteer free will and the impact this has on how leaders engage with them is also highlighted by Jäger, Kreutzer and Beyes (2009).

The importance of volunteers and VVMs doing the same tasks or activities and the understanding that brings was mentioned by P9, P15 and P16 and was mentioned by nearly all Samaritans participants. Volunteers needed to be able to see you “walking the walk” according to P2, and P5 noted “there’s this feeling...this...recognition that we are all somehow in this together”, a view supported by P10. Affective commitment, where volunteers feel a strong connection to the organisation, is a key indicator of good relations with volunteer managers (Greene and Ward, 2016), further evidencing this. Volunteers want to be there; P9 comments “someone who wants to be there will give more than someone who is almost not forced to be there but paid to be there” which can be aligned to Posner’s (2015) observations that paid managers may have a different attitude and commitment to the organisation and its values compared to VVMs, whose views may be more in line with the volunteer group. P9 goes on to say “when you’re volunteering you’re part of a team and you don’t want to let that team down, so you go further and do more because you are part of that...you volunteer and that’s what you do.” He also notes “I would never ask one of our crew to do something that I wouldn’t do myself. And I think that’s quite important...because if you’re paid to do a role and a job...you’re expected to do that, if you’re a volunteer...you should all sort of muck in.” This

highlights the perceived increased importance in a voluntary setting. This is supported by P7 who used the example of asking someone to walk to the branch to cover a shift at short notice due to snow “I don't think it's even possible for somebody who's being paid a salary to say to a volunteer, that's what I want you to do. Just because...The person who asked you to do that has to be somebody who does it themselves.” P13 also felt strongly “I think how can you understand where the volunteers are coming from if you've not done it yourself?...You know, when it gets to three in the morning and you're propping your eyes open, how can you understand that if you've not experienced it?”

P7 stated that the egalitarian nature of Samaritans supported by role rotation is a major contributor to this “in Samaritans, what is really special about the leadership is we are led by ourselves. We are led by people we see as ‘us’ to a large extent, and that is because they *are* us” and that this was highlighted by the fact that when you step down from your VVM role, you return to your volunteering role to be led by someone else. This was similar to the experience of P9. It was unclear from the participants if this increased or reduced their perception of the EL required but was seen as a significant element. The use of example setting and demonstrating shared values is seen as a significant leadership indicator for volunteer leaders (Posner, 2015) as well as demonstrating a servant leadership approach (Laasch, 2021).

Managing and leading volunteers requires a higher level of EL due to the lack of pay, different motivations behind volunteering, as well as a more limited range of tools to help manage less helpful behaviours (Greene and Ward, 2016; Nesbit *et al*, 2016); volunteers are “sensitive to interpersonal issues in their volunteer work” meaning volunteer managers – whether paid or volunteer - need to be able to “connect with and understand other people” (Nesbit *et al*, 2016). The value of shared experience of volunteering is seen as a significant difference in the relationship between a VVM and their volunteers compared to a paid VM.

5.7 Theme F – Sources of experience and learning of wider leadership and management

Participant interviews were the main source for this theme although informal conversations revealed that many VVMs recognise the wider experience their volunteers bring with them, even if the wider organisation does not. Participatory conversations were also significant here.

Ascertaining where VVMs obtain their LM experience is key to understanding what needs to be done to support them more effectively in their roles and to support the sector as well.

Thirteen of the VVMs' professional paid experience was in public or private sector organisations whilst P9 had run his own business for many years and P11, P13 and P14 had gained most of their experience in the voluntary sector, with P14 highlighting the importance of wider continuous development "I pick up stuff from the bulletins, from websites, from kind of sort of talking to more experienced leaders of volunteers...I think we can learn from the international experience." All six of the Samaritan VVMs who have been in VVM roles at the same time as in paid employment acknowledged that they had taken the skills learned in their volunteering and VVM role and used them to be more effective in their paid employment roles (P2, P3, P5, P7 and P10). This is a reflection of the value of Samaritans' communication skills.

The participants acquired their LM skills in a variety of ways. Over half had formal LM education and/or qualifications from professional bodies, colleges or universities or formal workplace training (P1, P4, P6, P7, P8, P10, P11, P12, P14, P15 and P16) which has supported them in their VVM role, whilst P3 and P5 had no LM experience before taking up their VVM role but have used this experience to develop their career and subsequently undertaken LM training/development. P9 and P11's LMD had been gained exclusively to support their volunteering roles. Other VVMs, P5, P7, P16 worked in L&D roles and gained their knowledge through delivering LMD. P5 had little experience when he started his VVM role but had then been able to use the skills learnt to acquire more senior roles and further learning at work. Overall he felt "work provided me with the learning and skills and Sams gave me the opportunity to utilise them more". All participants had acquired significant learning and knowledge

from doing a variety of LM roles, with several noting that observing others and learning from observation had played a part with P7 observing “I focussed on positive and negative mentors as I would call them. So yes, I had a number of negative mentors that I held dear to me, sort of, you know, these are people that I will definitely not emulate and...positive mentors who, you know, clearly were different from the negative mentors, but they would bring something.” However for five of the sixteen participants this is the only way they have acquired these skills, either in their paid work or in their VVM role. Whilst for some VVMs this worked well, some participants faced additional challenges. P13 felt she received no support and had been expected to just “get on with it” and P11 had to overcome barriers related to the cultural differences between hearing and deaf leadership cultures and the lack of funding for interpreters.

These five, nearly a third of the group, clearly fall into the CMI’s definition of an accidental manager (CMI, 2023). If such managers can have a significant negative impact on staff turnover (CMI, 2023) then potentially they could have the same impact on volunteer turnover, particularly at a middle management equivalent level (Bosley and Gifford, 2023). Given that information about their volunteers’ skills is inconsistent across the sector (Bentley, 2024, Reynolds, 2024; Vizer, 2024), charities may be making assumptions about existing skill levels and decisions about what LMD is needed that could be inaccurate at best and damaging at worst. When taken in conjunction with the challenges of finding and retaining volunteers acknowledged throughout the sector (May, 2023; Whitehead, 2023) it would seem critical that these organisations ensure that their VVMs are sufficiently skilled in their roles to support volunteer retention and retention of the VVMs themselves.

Participants were asked how well they felt their LM skills and knowledge transferred from their paid work. As already noted, some VVMs’ skills were gained in either the sector or specifically to support their volunteering role. Where this was not the case, there was consensus that the skills themselves were transferable but that their application was often different, and this was linked to the points raised in Themes D and E relating to managing volunteer relationships and EL. Views varied with P1, P4, P10, P12, P15 and P16 stating the skills were transferable, although P4 and P16 were clear they needed tweaking in their application. P12 felt he used many of his

leadership (people) skills but very few management skills. P7 felt the skills were “massively transferable” and this applied to both directions, a view shared by P10.

The variety of ways LM skills and knowledge were acquired clearly reflects what happens in the workplace, since there was a mix of learning and hands-on experience in workplace LM skills. In Theme I the type and consistency of LMD provision for VVMs will be considered. There is clear agreement on the transferability of the skills but how much they need adapting is less clearly shown. This is interesting when considering the emphasis placed on the lack of tools to manage behaviours and the need for a higher level of EL in managing volunteers which would imply that the skills needed to be applied differently to achieve this. One possible reason for this ability to identify the need to adapt leadership approaches and potentially to do so more easily or successfully could be related to the nature of these VVMs. Almost all the participants had been volunteers in their current organisation or in a similar organisation before taking up their VVM role. The likelihood is that the time spent volunteering in the organisation influenced their view of what style and approach would work best in that environment, meaning they were aware of what needed to change/remain from their previous LM approach and evidenced through the comments relating to emotional labour involved in managing volunteer, for example P9’s observation that “if you’re getting paid to be there, well then just sort of, you know what the thing was, you’re being paid to do it...But actually you’re volunteering, why should they volunteer their time to do something that they’re not happy with... it’s different because they don’t have to be there. They choose to be there.” If this is the case, then ensuring volunteers have sufficient exposure to the culture, values and beliefs of the organisation and the volunteers will help provide better transfer of LM skills from a paid workplace to a voluntary role although it is questionable whether this is sufficient to ensure effective leadership and management from VVMs.

Of those participants who had developed their LM skills through their workplace, only P14 had developed these skills in the voluntary sector; the others had developed them in either for-profit organisations or the armed services through a mix of training and doing the role. The literature acknowledges that different organisation types e.g. large organisations, SMEs, public and private sector approach LMD differently (Perkins, 2016; Buchanan and Huczynski, 2019; Barends *et al*, 2023) but ultimately

the discourse and provision is predominantly based on developing leaders to function effectively in an environment where there is a clear positional power-relationship driven by the employment contract and very often in a profit-focused domain (Iszatt-White and Saunders, 2017; Bratton, 2023b). This contrasts significantly with the view that relational approaches such as shared, distributed or servant leadership are most effective when leading volunteers (Freund, 2017; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022). Whilst it is positive that VVMs recognise the need to adjust their approach and apply their knowledge and experience differently when leading and managing volunteers, this would seem to be a risky, unfair and potentially damaging approach. It relies on all VVMs being self-aware enough to see this and understand what adjustments need to be made, and then have the ability to do this, potentially without any support or feedback, meaning VVMs are effective more by luck than any consistent planning. This must surely have wider implications for the engagement, motivation and retention of volunteers and VVMs – although the lack of consistent data about volunteers and particularly VVMs means it is unclear how significant this might be.

Overall the worst-case scenario would be that a workplace accidental manager has no structured or formal LMD and learns poor skills and behaviours from observation and experience and is then offered a VVM role where they apply these to this role, again without formal LMD, becoming an accidental volunteer manager. In applying their workplace-based skills they have a significant negative impact on the local volunteers, potentially on service users, donors and the wider organisation's reputation and themselves. Providing meaningful, appropriate LMD would mitigate these risks considerably.

5.8 Theme G – Appointment to role and expectations

Participant interviews informed this theme, although informal conversations revealed that the findings here are common and there appears to be a lack of certainty in the sector about how to do this in many organisations.

Understanding how LM roles are appointed and how volunteers are informed of the expectations of the role provides a rounded picture of how volunteers take on LM roles and alongside how they feel about these roles underlines the challenges faced

in a VVM role. Processes varied significantly across the organisations, varying from asking a willing person who may or may not have the skills without any formal process through team members being involved in the decision to robust and formalised processes. Often the lack of formalised recruitment and selection processes (R&S) was exacerbated by missing, unclear or incomplete role descriptions or other documentation although the lack of such documentation is not unusual (Jäger, Kreutzer and Beyes, 2009). Recruitment is more effective when volunteers feel the tasks match their motives (Einolf, 2018) and role descriptions ensure a better volunteer experience (Nesbit *et al*, 2016), so this would also apply to VVMs. A clearer and more consistent approach, along with role clarity, would support better VVM recruitment, a view supported by P10 “So I think there's lots of people in our organisation that have those skills that could do it but because of the way we do the application at the moment, they'll never get to be a branch manager because people don't know that they've got the skills”.

P8 felt although things were now changing in their organisation, historically it had been “recruitment by accident” and P2, P3, P4, P5, P10 and P13 all commented in some way on the appointment of those who were available or willing, who were known to others and even a “tap on the shoulder” being used rather than a robust objective process which again reflects an approach to appointing accidental managers (CMI, 2023). This accidental approach was a direct experience of P13, whose own experience was driven by organisational need “And so what used to happen, as can happen with volunteers, is that people would suddenly drop out or we wouldn't have enough to open the shelters at night...other colleagues...would sort of go down and just basically fill in the gaps. So that's how I got to be supervising overnight in the shelter because it wasn't acceptable in the winter not to open.” P2 believed that sometimes this approach could allow those without experience to take on roles and grow into them, and P14 concurred, as long as they had sufficient base level experience. P3 felt it was nice to be offered the role since they would not have put themselves forward for it. P7 felt that although he had not always had the confidence or believed he had the skills to do some VVM roles, the person who offered him the role had believed in him and supported him and that had been a critical part of his wider development “much more importantly, though, is the transfer of skills the other way around. I don't think I would have been able to have

the enjoyable career I've had doing what I've been doing for money had it not been for skills I learnt in [my volunteering]." It is unclear if this offer of appropriate support was planned or unplanned, formal or informal, further underlining the challenges in identifying whether this was reactive, meeting preset needs or a structured approach (Stewart, 2009; Mumford and Gold, 2004).

The lack of clear documentation and robust processes was noted by P1, P2 and P15 and seen as a barrier, again highlighting how LMD can be provided in a haphazard manner. In contrast, there was also evidence of robust and formalised processes, with P11 and P12 noting that these reinforced the need for specific, relevant and well-developed skills. Both also felt that this structure encouraged others to take on additional roles. For the RNLI (P9) leadership roles are critical in life and death situations and crew need to feel safe with their leaders so the processes reflect this importance. P16's organisation was less hierarchical, individuals picked up a range of tasks as required so conversations about appointment to LM roles were not needed – again the distributed leadership seen in this organisation makes this an outlier. Interviews with participants and informal conversations with volunteer managers show that not only do VVMs often bring business-focused LM learning to their role but also that the leadership style seen in these non-profit organisations is more likely to reflect styles prevalent in private sector for-profit businesses (Freund, 2017), rather than the more relational approaches considered effective and needed within the voluntary sector (Posner, 2015; Jäger, Kreutzer and Beyes, 2009; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022).

At senior staff and CEO level, this is driven by the learning and development provided by organisations such as the Centre for Charity Effectiveness at Bayes Business School and ACEVO (Association of Chief Executives of Voluntary Organisations), where development has a focus on transformational leadership as well as shared approaches (Ivanovska Hadjievaska, Johansson and Altermark, 2023). Einolf (2018) comments that VVMs are less likely to use formal HR practices than paid VMs, but whilst middle-management staff are most likely to reflect the leadership style they see in the organisation, VVMs who are not provided with appropriate LMD may be more likely to use the approaches they have learnt in their own LM experiences, making consistent approaches to leadership and management across the organisation impossible to achieve and potentially leaving them unaware

of the need to manage volunteers differently from paid staff (Greene and Ward, 2016).

Participants were also asked if they saw a link between their R&S processes and succession planning. For P9, progression planning was key, and supported with an abundance of training and opportunities. Being able to step down from LM roles and back up (pending availability of roles) is accepted in the organisation. This is also the case in Samaritans. This question was not answered by all participants so it is unclear if this is the same across all the organisations. P1, P4, P7 and P10 felt that the lack of clarity around R&S made succession planning challenging, and there was no visible leadership pipeline to support this. A shared leadership approach is deemed better at supporting talent and leadership pipelines (Terry, Rees and Jacklin-Jarvis, 2020) and can enhance capacity building (Freund, 2017). P8 also noted that there was no clear succession planning for their role, but hoped the more robust structure would encourage others to get involved, thus changing this. This lack of clarity impacts on the diversity of those in LM roles according to P6 and P10, making it harder for those without prior knowledge to gain access to these opportunities. Ensuring that leadership development is available beyond positional leaders will also provide opportunities for a wider range of people to engage in leadership behaviours, particularly helpful in smaller charities (Jacklin-Jarvis *et al*, 2022) and potentially allowing for a more diverse range of leaders within the sector.

P7's view is that a leadership pipeline is critical to ensure sustainable LM and to create this "we need to make sure that the people at least two levels below...are fully aware of the nature of the roles above them". The right skill set for a VVM is hard to identify, according to P14. Volunteer leadership skills are required, but also an interest in the area of volunteering (here, heritage railways), someone with an HR background may be too focused on employment approaches. He acknowledged this is a difficult role to fill and makes succession planning challenging. There is an interesting divide in the literature between those who feel that managing, leading, motivating and engaging volunteers is better done through a more structured set of traditional HR processes (Nesbit *et al*, 2016; De Clerck *et al*, 2021) and those who question if this is appropriate, and that an approach based on volunteer values and passions would not be more effective (Einolf, 2018). Whilst the application of a more structured HR approach could be seen to be promoting the professionalisation of the

sector (Khan, 2020; Mumbi and Obembe, 2022), which is often seen as unhelpful, there is evidence that some elements such as a clear role description can help with volunteer recruitment and motivation and make further opportunities such as leadership roles, more visible and appealing to volunteers, supporting the development of a more diverse pool for future growth.

It can be seen that there is once again a significant range of approaches in how role holders are appointed and how the future of LM roles is considered. This could be driven by a lack of time or necessary skills or availability of volunteers willing to take up these roles leading to a reluctance to try a different approach. Equally it could be driven by a failure to see the importance of LM roles and the need to consider succession and sustainability. Here, size of organisation was not a common theme between those organisations who did have a robust process and those who did not. Where shared leadership is practiced, it is possible for anyone to be involved in leadership (Mumbi and Obembe, 2022) and building capacity is necessary but can be challenging to turn into reality (Freund, 2017). He notes that volunteers often prefer to engage in their primary voluntary activities rather than undertake tasks which resemble what is or has been done in a paid work environment. How an individual views her/himself, leadership and her/his perceived suitability for a leadership role can also influence this e.g. if s/he sees her/himself as lacking the skills and believe leadership is a higher-level activity, s/he is less likely to put her/himself forward. This is certainly the experience of this researcher.

5.9 Theme H – What is involved in the role

Whilst participant interviews informed this theme, the researcher's own experience concurs and the earlier discussion about the lack of role descriptions can be seen to support these findings.

Participants were asked how they knew what was expected of them in their LM role and what support/training was provided to support any development needed. Needing to be able to demonstrate the skills and experience required to do the job (rather than be offered development to do it) was a common theme for P11, P12, P14, P15 and P16 where there seemed to be an implicit assumption that you had the skills already. Alizadeh *et al* (2021) note that this is a common issue, citing research

as far back as 2008 where 80% of non-profits expected volunteers to have a specific set of leadership skills but none had a leadership development programme for volunteer managers.

As already noted, role descriptions were not consistently available or accurate when present, so these were of limited use in providing guidance on expectations. Instead, participants relied on either previous experience, being part of a leadership team or having observed others in the role. To some level all the participants who had previous LM experience relied on this to support them in the volunteering LM role, with P10, P13 and P14 focusing significantly on their experience in paid work. P9 noted that although there was no paperwork, experience of being part of the team meant that he had a good idea of what was required in the role, a view echoed by P1, P3, P5 and P6, all of whom had been members of leadership teams before taking on more senior roles. However both P1 and P5 commented that learning had also come from observing what had not worked. Providing orientation and training for new volunteers as well as ongoing training improves retention (Einolf, 2018), there is a strong likelihood that it would do the same for those stepping into new roles in the same organisation, as well as demonstrating their value to the organisation (Nesbit *et al*, 2016).

Some felt that they had little idea of what was required (P4, P7, P8 and P10) mostly because paperwork to support the role was either missing or incomplete and they received no meaningful handover.

Only two participants, P2 and P9 felt well prepared for the role.

This lack of consistency and dearth of meaningful support begs the question why volunteers would pick up a LM role if this is the level of information and support provided, and more research on volunteer motivation around LM roles would help with this. The lack of supporting documentation and training and the expectation that you bring the prerequisite LM skills and experience with you will have a significant negative impact on the diversity of those considering taking on VVM roles.

5.10 Theme I - What support did you have?

Participant interviews were the source for this theme, and this reflects the researcher's own experience. However, informal conversations with paid VMs identified that they were aware of the lack of resource in their organisations to adequately support senior or lead volunteers.

The type and level of support varied significantly across the participant group. Four participants (P3, P6, P10 and P13) felt that senior staff could set a better example of good leadership and provide more guidance, support and a more consistent approach, supporting further the importance of observing other leaders for developing leadership skills (Kempster, 2006) which recurs frequently in this analysis. P15 and P12 were both in roles where they felt that without credible evidence of the skills, they would not have been appointed, with there being an implicit assumption these skills are present. However as P12's role evolves, there is a robust and formal process to identify and support further skill development as necessary, a practice not evidenced for many participants. Three VVMs had a handover (P2, P3 and P4) although P4 found it poor. Over half (P13, P10, P9, P7, P6, P4, P3, P2, P1) either received, or were offered training although P1, P3, P6, P7, P10 and P13 all found it poor or insufficient. P10 noted that the training provided "doesn't really tell you what you need to do to be a director...it talks a little bit about leadership...do a bit of role play, talk a bit about these issues...I don't think there is a real structure." P13 felt that not only had she had to learn from experience alone "yeah, there was a lot of learning. I learnt a lot about how to do it, how not to do it there. But unfortunately...I wasn't the decision maker" but also that the supervisors as a whole lacked adequate training "I do feel that not just the supervisors, I feel that the volunteers and the supervisors were not properly trained." In contrast, P2 found it broadly supported his progression through the role although he also relied on self-sourced external sources of information and support, evidence of the use of informal and unplanned activities as part of LMD (Watt, Boak and Gold (2023) and to support a more formal approach (Mündel and Schugurensky, 2008; Henriksen and Borgesen, 2016; Page-Tickell, 2017). P16 would have found some LMD helpful if only to provide recognition of the role. P11 advised he would have been offered specialist support were it necessary although funding may have been a barrier. This shows the importance of ensuring that specific needs are understood and provided

for, particularly in relation to inclusive practices, a factor which is recognised within the sector (Jacklin-Jarvis *et al*, 2022; Mumbi and Obembe, 2022).

Buddies or mentors were seen as a significant support for many with half of the VVMs saying they had either been offered or had used this support (P14, P11, P8, P7, P6, P5, P3, P1) with P11 having both a hearing and a deaf mentor. Although not asked if these were also volunteers, mentoring is often a voluntary activity meaning the financial restrictions feared in relation to training would not have been present here. Fit and suitability was an issue for P1, P3 and P7, so the relationships never developed, demonstrating the importance of finding the right person and having a process to support it. P14 found their own buddy whilst P9 identified that in their environment buddying was not effective. That said, P9 was the only participant to find all the training provided helpful and critical to the role, unsurprising as the RNLI role requires decision-making and leadership in a range of potentially life-threatening situations. There is much made of the suitability of mentoring as a support mechanism in LMD (Coetzer *et al*, 2011; Gill, 2011; Perkins, 2016; Watt, Boak and Gold, 2023) with it being helpful for both leaders and leadership teams (Connor and Pokora, 2017; Garvey, Stokes and Megginson, 2018) although there is little evidence here that it has been used to support wider leadership team members since this question was not posed. Because mentoring is most likely to take place in situations related directly to the VVMs role, it also fits with Iszatt-White and Saunders' (2017) view that it is more likely to be effective than off-site LMD.

Informal strategies were by far the most common way that support was accessed with ten of the participants mentioning approaches such as using existing or building new networks and engaging in conversations with peers, other more experienced volunteers and staff colleagues. Although these approaches are not explicitly outlined as informal approaches in the literature, they do support the importance of informal learning within volunteering (Mündel and Schugurensky, 2008; Fullwood and Rowley, 2021), and particularly within LMD for VVMs (Palanski, Hammond and Khazanichi, 2022). Although not questioned explicitly about how effectively any learning from these activities was applied to their VVM role, given this was self-directed, it is not unreasonable to assume this application happened, supporting Henriksen and Borgesen's (2016) observation that learning from non-formal and informal aspects enhance the learning from a formal process. Overall, this

evidences a more holistic approach to gain the benefits of both formal and informal activities (Stewart, 2009).

Four participants (P14, P10, P6, P5) identified their own development needs. P3 noted that much of the learning required reflection rather than continuous action, something difficult to achieve in the role, although reflection is seen as a key part of developing leadership and management skills (Carroll, 2015; Fields, Thompson and Hawkins, 2015; Kiersch and Peters, 2017; Watt, Boak and Gold, 2023).

Only P9 commented wholly positively on the approach to LMD with all other participants identifying gaps or areas for improvement “so I think the support we're getting from higher up training a trainer and the management courses that we did definitely made a big difference.” The most frequent gap was a lack of any meaningful structured conversation to identify what development and/or learning needs VVMs might have, which could explain why the training and other offerings were not always helpful or appropriate. Some approach to formalised LNA is important in LMD (Gill, 2011; Patterson *et al*, 2017; Beevers, Rea and Hayden, 2020; Choi and Park, 2024) to ensure that the individual's needs are correctly identified and then met, as well as to allow for meaningful evaluation of the effectiveness of the support offered. Competency frameworks can also be used (Gill, 2011; Page-Tickell, 2017; Watt, Boak and Gold, 2023) but there appears to be little uptake of these for use with VVMs.

Whilst self-identification can be useful (Huang *et al*, 2014), reliance on this may also have contributed to the issues with the training provided, as it presupposes that VVMs have a full grasp of the requirements and their skills. However, the lack of accuracy and completeness in role descriptions means that any self-identification may be flawed and could lead to the training provided being misaligned to the needs of the role. Improvements included suggestions like developing the provided personalised SWOT to include a personal development plan; more consistent support and more timely training. As any tools used need to allow individuals to consider their specific needs (Elmholdt *et al*, 2016), a contextually sensitive approach is needed (Hodges and Howieson, 2017). P4 reflected the overall responses here, saying that even though they had found the generic training good and helpful, it was more by luck than due to any planning and the lack of structured

identification of needs and provision of meaningful support left them feeling that the attitude was “sink or swim, it's up to you”.

Nearly half of the VVMs interviewed had received no formal LMD prior to taking up their VVM role and felt that their experience of being led/managed and observing others lead/manage had informed their LM practice – as seen here, often in the absence of timely, appropriate and individualised LMD. This, and the comment above about staff setting a better example shows how others' behaviours influence leadership and management practice (Kempster, 2016), underlining the importance of a consistent and holistic organisational approach to leadership, leading, management and the development of these skills for both staff and volunteers in leadership/management roles.

5.11 Theme J - How well equipped/skilled do you feel now?

Only the participants themselves could answer this question.

In spite of the challenges faced in relation to role descriptions, identification of skills, learning needed to do the role and the quality and timeliness of any training provided, all of the VVMs felt that they were now well-equipped to do the role, with P3 commenting on new skills learned, albeit with the proviso that time to do them could be a challenge “I've done things. I've done grant applications. I've you know, I've tried to do an awful lot of things and I know that I can do things, it just takes me a long time to get to them.” Interestingly, nine of the VVMs specifically included or focused on soft skills such as communication and relationship building with volunteers in their responses, reflecting the importance of these for VVMs, demonstrating the general importance of these (Goksoy, 2016; Benmira and Agboola, 2021; Laasch, 2021) and supporting a relational leadership approach (Pielstick, 2000; Posner, 2015; Nesbit *et al*, 2016). The remainder (P1, P8, P9, P12, P13, P15) focused on general skills they had developed. This further reflects the importance of relationships between volunteers and VVMs and the perceived need for higher emotional investment to lead and motivate volunteers effectively.

Since effective evaluation needs to be closely linked to the initial LNA and the learning intervention (Patterson *et al*, 2017), it is unsurprising that, given the lack of

LNA, there was little evidence of robust evaluation. There are challenges associated with evaluating LMD (Elmholdt *et al*, 2016), including a reluctance to question assumptions and engage in change that might follow (Rogers and Gullickson, 2023), but it is still seen as a critical consideration (Dai and Tymon, 2016; Beevers, Rea and Hayden, 2020). This is not only to show effectiveness, but to support ongoing organisational learning (Watt Boak Gold, 2023) and demonstrate transfer of any behavioural changes and learning in the VVMs day to day activities (Henriksen and Borgesen, 2016).

There was no formal measure in place to identify how well VVMs performed in these or other skills, with the VVMs' opinion being a combination of observation of interactions with volunteers in different situations, reflection and positive feedback/lack of negative feedback from a variety of sources. Whilst all these form elements of evaluation, they do not form part of a wider cohesive planned process. There was no follow up after any learning/training took place for the majority of participants, with only P7, P9 and P16 identifying follow up such as regular feedback and one to ones taking place. There was no checking how any learning had been applied according to P2, P5, P6, P7 and P10, meaning there were limited opportunities to identify further learning/training needs. P8 noted that although there was follow-up, this was reactive when something went wrong rather than proactive to embed learning.

Of the group, six participants had received no LMD in their VVM role, and of the remaining ten, only three felt there had been any attempt to evaluate the effectiveness of the intervention(s). P6 had completed a form, P8 did not specify the medium but confirmed evaluation to Kirkpatrick L1 was all that was undertaken and in P9's organisation, the learning and its application is tested in regular training drills. The remaining seven were made up of six Samaritans and one other volunteer. This data shows that large organisations are more likely to provide some development (Samaritans, RBL, RNLI) with smaller organisations providing training for mandatory/Health & Safety issues but less for wider LMD. Meaningful evaluation at any level of Kirkpatrick's model does not routinely take place in any of the organisations.

5.12 Theme K - What Leadership and Management Development provision would help VVMs be more effective in their role?

This was based on participant interviews, although as noted elsewhere, paid VMs are often aware of the lack of suitable provision for these roles.

Overall the changes suggested were consistent across all the participants and reflect what would be seen as good practice in L&D generally.

Within Samaritans, senior volunteer roles have a 3-year rotation and poor, too short handovers with insufficient structure and guidance were the main concerns highlighted by four participants (P1, P2, P6, P10). It is not clear if there is a lack of formalised role rotation for VVMs in other organisations or if handovers are more effective, although anecdotal evidence from conversations with AVM members highlighted concerns about how to manage role rotation.

For over half, the starting point needed to be some kind of skills audit/learning needs analysis/personalised one to one conversation to pinpoint existing skill levels, discuss the skills required to do the role and identify how best to fill the gap, this being raised by P1, P2, P4, P8, P14 and P16. P5 and P10 agreed and felt it was important this was tailored to the individual's needs and existing skills, not just a perceived set of skills with P3 and P6 highlighting the need for available provision to resolve those gaps. P10 felt that this would be helpful at the start "a set up conversation of what is expected and a bit of a skills matrix of, you know, are there any areas of development you need? And then there should have been clear workshops related to that skills matrix." And followed up by ongoing support – "but I do think there needs to be that six month review...you have a review of how you're getting on there and where you want to go, what does your future look like? What do you need to develop, what you're good at." P8 highlighted the need to be more proactive in these conversations and subsequent support. This supports the need for a robust and timely LNA (Gill, 2011; Patterson *et al*, 2017; Beevers, Rea and Hayden, 2020; Choi and Park, 2024).

When it came to what sort of training would be helpful, there was a mix of views. P5, P10, P11, P13, P14 and P16 reinforced the need for personalised learning and the importance of application of the skills in the specific voluntary environment, with P14 noting that some coming into VVM roles bring LM skills which "sometimes need to be

toned down a little bit to sort of get them to realise that they are actually working with volunteers". This last point supports Greene and Ward's assertion that VMs are trained and supported to develop the necessary skills and also the view that relational skills are less transferable from training to workplace when compared to general management skills (Barends *et al*, 2023) and an individually tailored solution will be more effective.

P5 questioned whether there was enough support provided for someone with limited prior experience and sufficient stretch for those with significant experience, an issue a robust LNA process would address, whilst better communication about what information was needed and making this more accessible was key for P6, supporting the need for a clear role description or similar document. P14 was explicit about what LMD for VVMs should cover, including motivation, supervision, recognition, reward, conflict, barriers to volunteering and legal topics, with the volunteer at the centre of the learning although he also identified the challenges involved in engaging volunteers in this "I think realistically getting that group of people...even part groups of the people to sit down for a day or morning...or...a series of them is, I would say the chances are disappearingly low...so I think that the way to do it is by stealth, by the kind of introducing it informally." P1 added the importance of delegation and P16 supported this and the need for soft skills training was echoed by P13 whose experience was that this was often overlooked and training on mandatory topics prioritised. This list demonstrates how the role is a mix of leadership and management tasks (Rochester, Paine and Howlett, 2010; Bezboruah, 2011). To be effective, LMD should include general management and interpersonal skills (Bosley and Gifford, 2023), and for volunteer managers, the ability to manage higher levels of emotional content is significantly more important (Greene and Ward, 2016). Although P12 was not at the point of accessing LMD training, she hoped to see structured support suitable for individual's needs alongside support with monitoring progress as well as acknowledging it is there to help rather than restrict volunteers. In contrast, P9's experience is that there is enough LMD available but expressed concern that asking volunteers to take on more responsibility was not always the best option as it risked burnout. "I think the biggest thing for me that I've raised...is that we are volunteers still and we do it because we love what we're doing and we think we're good at it. But the organisation has to be careful not to put too much on

the volunteers. So they've, you know, they've taken and tried to save money, which is understandable in certain places and then get more stuff done in house, but that's being done by volunteers. Now the volunteers won't say no because they enjoy doing it. But if they put too much on the volunteers, they won't do it and then they won't have a service...I just think that they need to...be careful not to put too much on to the volunteer.”

Timeliness of the training offering was a further challenge, with P1, P3, P4 and P6 feeling there needed to be training before taking up the VVM role. This was a direct reflection of their own LMD experience. P13 also raised timeliness as an issue, with training often being offered reactively rather than proactively. Several participants (P1, P3, P6, P10) also suggested that an easily accessible range of ongoing options to help develop your skills and knowledge as you do the role and identify gaps would be helpful. Allowing time to undertake the learning, using different approaches, delivering it over time to embed learning and providing time and space to practice in a safe environment during and after the event all enhance the effectiveness (Bosley and Gifford, 2023). Ensuring LMD is systematically integrated into organisational processes is also critical (Barends *et al*, 2023).

P6 commented that where the LM role is large there can often be a knowledge gap as well as/instead of a skills gap e.g. knowledge of things like processes and wider organisational structure as well as “where are the keys to the filing cabinet?” P3 identified other areas where a more structured approach would help address a skills gap “I think if there was if there was...a menu of how to deal with volunteers, how to write grant applications, how to do facilities management, if there was like a menu and I could just step in and go, OK I've got these challenges at the moment.” As the author has had direct experience of this as well and P6 was a Samaritans volunteer, it raises the question if this is common only in Samaritans, or other organisations as well.

Some kind of formalised mentoring relationship was suggested as an important element by half the participants (P2, P3, P4, P5, P6, P7, P8, P10) with suggestions such as a regular, structured process using a training matrix that started before the VVM role being made, for example P3 suggested “if I could be like, OK, every second month I got to meet with this person and reflect on how I'm doing and, you

know, we did some work kind of prior to me starting as director and then...you have to make the time to do the things you want to do. So if you if you had it all mapped out in advance, then you'd make the time, I think.” P4 noted that there were often unrealistic expectations in relation to the VVM role and that a relationship like this would allow this to be identified and discussed. Mentoring is a principal part of LMD not just in business contexts, as evidenced by Carroll (2015), Connor and Pokora (2017), Garvey, Stokes and Megginson (2018) and Watt, Boak and Gold (2023) but also by Gill (2011) and Fullwood and Rowley (2021) in voluntary settings. P1 felt that although honest conversations about the commitment to a VVM role might deter some, it would ensure that people knew what to expect of the role and a mentoring relationship would provide a space for such discussions.

Five of the participants felt that ensuring we have VVMs in the future is important. Succession planning was mentioned as important by four participants (P4, P8, P12, P14) with P14 also acknowledging that volunteers could be resistant to engaging in LMD as it was seen as a professionalisation of volunteering so he often approached this through informal conversations. P7 framed this in terms of building leadership pipelines and discussed the need to raise awareness with volunteers of what it takes to make this part of the organisation work e.g. a Samaritans branch. Doing this would promote “growing our own” and would positively impact on diversity, as instead of leadership being “the preserve of the few, it becomes the expectation of the many”. This would however require a process of knowledge building and skill development. He also felt followership and its associated skills were important. The importance of followership (Laasch, 2021) and developing leadership skills in future leaders (Freund, 2017; Alizadeh *et al*, 2021) have already been discussed in Theme F. This view of voluntary organisations growing their own VVMs for the future is the direct opposite of what has been evidenced thus far, which is that the sector seems to expect volunteers to come with LM skills developed in other sectors.

One issue raised without any prompting by a number of participants (P3, P4, P5, P6, P10, P11) was diversity of VVMs. We say in the sector that we want more diversity, particularly in leadership roles (Alizedah *et al*, 2021) but what we do seems to perpetuate what we already do and who we currently are. There was agreement that the sector needs to increase the pool of volunteers who might see themselves as future VVMs as a way of increasing diversity, given that recirculating volunteers in

senior roles is common, a view also expressed in many informal conversations with employed VMs at networking events and in conversations. Opportunities to meet other volunteers in different roles e.g. meeting volunteers from other Samaritans branches at regional events, might encourage others to see these roles as desirable and achievable and break down the barriers that come from seeing the same few people in senior volunteering roles. P11 commented that finding interpreters for training could be a challenge, identifying further barriers to LMD in the sector. The attitude to and nature of volunteering has also changed according to P5, which is reflected in a number of reports and articles (Kanemura, Chan and Farrow, 2022; May, 2023; Rich and Lapshynov, 2023; Oliver, 2024). The reasons vary: some changes were driven by Covid-19 and a new landscape post-pandemic; others are demographically driven with older volunteers leaving and younger volunteers having different motivations to volunteer. This too has been discussed at length by paid VMs in meetings and informal conversations and raises the wider question of whether we need to fundamentally change how we view LM roles in volunteering.

There are pockets of good LMD provision in the sector but this research shows that this is inconsistent and is exacerbating issues such as lack of diversity in VVM roles. What is accepted as good practice in L&D and LMD is not taking place in many organisations but is clearly identified by these participants as being necessary and beneficial. Identifying what diversity levels are within leadership roles in the sector, and potentially what specific diversity goals organisations have in relation to this, is another area where further research would benefit the sector.

5.13 Anything else?

This is drawn solely from the participant interviews.

Question 9 allowed all participants the opportunity to add anything else to the discussion and many provided additional commentary which has been added to the themed analysis above. The remainder are documented below to provide an indication of what volunteers felt to be important but which fell outside the wider themes.

Several of the VVMs commented on how much they enjoyed the role or wanted to be there and how important this is (P4, P9, P10, P14). Given the challenges outlined in some aspects of being a VVM, this is clearly a key motivator for these participants.

P15 commented that merging some aspects of their volunteering would make things simpler for the VVMs but also reduce contact with volunteers, which may not be a positive. This supports the view that managing and leading volunteers is a highly relational role (Jäger, Kreutzer and Beyes, 2009; Posner, 2015) and the relationship is critical in building volunteer commitment (Dwyer *et al*, 2013).

P13 felt her experience has defined clearly for her what good management and poor management looks like. She felt that valuing volunteers is important as it can lead people into employment, offer training and upskilling. This view too links to the need for a relational leadership approach.

P12 believes a supportive team environment is key and will work to develop this, seeing success as everyone getting something out of their volunteering. She also feels she has got more back from being a volunteer than she has given out. The supportive leadership team mentioned here demonstrates a more shared leadership approach as supportive and developmental (Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022).

P14 felt understanding your own and other volunteers' motivation is critical if you are a volunteer volunteer lead because if you don't enjoy it, you won't do it well. He felt lead volunteers can be the people who do the role because no one else will but they may also enjoy feeling needed and not want to relinquish it. This reflects the wider concerns mentioned in conversation with paid VMs but also highlights a potential gap for future research into why volunteers take on VVM roles.

P9 commented that we definitely manage volunteers differently from paid staff as volunteers don't have to be there. We need to be respectful of them, treat them well, not "give them a b*lllocking" and remember the importance of mucking in together. He reflected that perhaps we should manage staff more like we manage our volunteers.

5.14 Chapter Conclusion

Ivanovska Hadjievska, Johansson and Altermark (2023) identify that most LMD provided for VSO leaders are a mix of transformational and collaborative leadership but note that most working in LM roles are looking for career progression within their own or other CSOs, in a sector that is increasingly professionalised and this helps explain the focus on a more traditional vertical style of leadership using top-down models and styles of individual leaders. This researcher would argue that this makes such LMD unhelpful for VVMs since (paid) career progression is not the main aim of those in these roles. As an approach that meets the needs of the organisation is required, there may be a place for elements of transformational leadership, however given that management activities also need to be undertaken, elements of transactional leadership may also be required. The views of others who research in the field, is that a more shared and collaborative approach is the most suitable way of ensuring effective leadership and management of volunteers, and the findings from this research show that this is the case for the VVMS interviewed. As such, it can be argued that current leadership and management approaches in the sector, particularly where VVMs are involved, are not suitable. Therefore it would be a logical progression to say that if LMD is not based on shared/distributed leadership principles, it too is not fit for purpose.

Chapter 6 - Conclusions and Recommendations

This chapter will provide an overall summary of the thesis as a whole and then provide a synthesis of the conclusions which can be drawn from the research. These will be supported by a range of recommendations to address the issues identified by the research.

The chapter ends with some wider conclusions, drawn holistically from the research process and research itself, along with some reflections.

6.1 Summary of Introduction (Chapter 1)

The Introduction sets the scene for the thesis and starts with an introduction to me as a researcher and specifically what has driven this research. From here an overview of the different elements of the whole are outlined. An introduction to the voluntary sector and the importance of volunteering is provided. This is followed by an outline of key discussions relating to leadership and management and LMD research and where the voluntary sector features in both of these. The rationale for the methodology, challenges relating to the participants, and an explanation of data analysis choices follow on from this. Finally a summary of the hoped-for contributions to knowledge and practice, research objectives and research questions are noted, with an outline of the following chapters drawing this to a close.

6.2 Summary of Voluntary Sector Overview (Chapter 2)

Chapter 2 presented some challenges, mostly related to identification of what exactly the voluntary sector is, and how it is similar to and different from concepts such as civil society. Whilst the high-level statistics around volunteer numbers was helpful, the lack of disaggregation of the data meant that volunteers are often considered as a homogeneous group (NCVO, 2017), however the wider picture shows a significant difference in the type and frequency of volunteering (Speed, Crawford and Rutherford, 2022) which is not always reflected in the statistics. There is also conflicting data over for example the value of volunteering to the economy and what this represents in social and monetary value (Armour, 2022; Ricketts, 2023;

Whitehead, 2024). Thankfully this information was not critical to this research, but the lack of consistency felt like a reflection of the bigger picture relating to information about the sector as a whole.

The chapter provided a definition of the voluntary sector and an overview of the varied roles such organisations provide to the society. It demonstrated the breadth of the sector, and as pointed out in the introduction, the range of terminology used to describe the sector. Professionalisation in the sector was considered; this can cover aspects such as commissioning for projects (Ellis Paine and Macmillan, 2019) to meet the same standards as for for-profit organisations and wider people management. There is evidence of a reluctance to use formalised business vocabulary on the one hand (Jäger, Kreutzer and Beyes, 2009) whilst on the other there is an expectation that a more rational approach (Khan, 2020) and formal HRM practices are used. Regardless of these conflicting views, there has been and continues to be a lack of professional development in the sector (Alizadeh *et al*, 2021). Although there are a range of different figures outlining the value of the sector to wider society, what is clear is the overall value of activities in supporting social needs, particularly in recent years, as is seen by the value put on the sector. This value is provided by organisations ranging from small local charities to large multinational charities and TSOs, with differing proportions and numbers of volunteers and staff.

The Covid-19 pandemic has had a significant impact on the sector, with volunteer numbers falling and volunteer profiles changing. Traditional regular volunteering was replaced by micro- and short-term volunteering (Speed, Crawford and Rutherford, 2022). Post-Covid numbers have increased closer to pre-pandemic levels, but the changes to volunteering habits have to a greater extent remained (Tabassum, 2023). It remains to be seen what impact the legal finding on Groom vs. Maritime Coastguard Agency (Kisby, 2024) will have on volunteer numbers and engagement in the future. The variety of organisation size and type will influence the management approach within voluntary organisations, however prevailing legal and cultural norms also have an impact. Research into these elements of voluntary organisations is often economic in nature, which presents issues as whilst these organisations need to manage their financial resources effectively, they are not driven by profitability.

Further challenges are the more collaborative and participative expectation of management and the range of motivators for those both working and volunteering in the sector. These indicate the need for a different approach to leadership and management in the sector and although some (Anheier, 2014) differentiate between these activities whilst others (Terry, Rees and Jacklin-Jarvis, 2020) focus on leadership, there is broad agreement that a different, more distributed/shared approach is more effective here. Overall however the main focus of the research into leadership and management within the sector is predicated on staff managing volunteers rather than volunteers managing other volunteers. Given that many smaller and some larger charities such as Samaritans have volunteers leading and managing other volunteers, it is clear that there is a significant gap in the literature here (Posner, 2015; Alizadeh *et al*, 2021). This gap is exacerbated by the lack of data held on how many volunteers might hold such roles, even in large organisations. Further research into this area would be helpful to identify the scale of the issue and potentially provide a more accurate view of the social and financial contribution of volunteers to the economy.

It can be seen that this chapter highlights the breadth of the sector and gaps in the literature relating to volunteer management. This lack of specific research is noted in the literature itself, so this review confirms both that the gap is there and provides information about other gaps in the sector, such as data on senior volunteers generally. It could be argued that this is also new information as there appears to be almost no research into VVMs, their roles, how we recruit, select, develop and support them.

6.3 Summary of Literature Review (Chapter 3)

A review of the wider literature around leadership, management and LMD is discussed in this chapter. The lack of specific literature into leadership, management and L&D in these areas within the voluntary sector presented a significant challenge although it has also highlighted a gap in our knowledge about the sector. This may be due to the changes experienced by the sector and discussed in chapter 2, and also by the lack of importance often applied to the sector more widely. This lack also explains why for-profit approaches are often seen in the

sector and supports the need for more specific research. Due to the dearth of research into these areas in the voluntary sector and specifically in relation to VVMs, a significant part of the review considers research done in the for-profit sector. A further challenge in completing a literature review was that where research has been conducted, this is often for CEO or Trustee level rather than considering a middle-management level equivalent which is where this research was based. Lack of consistency of language relating to volunteers, leadership/management and training/development added to the challenge.

Management is broadly accepted to be about task as reflected by theories from Taylor and Fayol (Robbins, Judge and Campbell, 2017), whilst leadership is often more focused on relationships and influencing, although the latter is also felt to be an elusive concept (Harrison, 2017) and this lack of consensus is reflected in the voluntary sector (Terry, Rees and Jacklin-Jarvis, 2020). The literature and wider research uses the terms both specifically and interchangeably. Most noticeable is that older literature talks about management whilst more recently the focus is on leadership although often the issues and skills under discussion are similar.

Management within the voluntary sector can often conflict with volunteer motivations (Kreutzer and Jäger, 2011) as it can be about both process and people but the perception of professionalisation and the differences in motivation between doing paid and unpaid work are a further challenge to applying for-profit management practices in not-for-profit environments (Paton and Cornforth, 1992). Whereas management often comes with a title and a level of power and authority, leadership can be found outside of these formal roles and some authors differentiate between leaders and leadership (Dai and Tymon, 2016) with Terry, Rees and Jacklin-Jarvis (2020) echoing this within the voluntary sector.

A range of theories was discussed in the literature review with the focus on those that provide an opportunity for a relational and collective leadership approach, one that is felt to be most appropriate and is being seen more often in the sector (Ivanovska Hadjievaska, Johansson and Altermark, 2023; Lyndsey, 2023). This is a distinct difference between this and the for-profit sector where a short dalliance with distributed leadership and a more follower-centric approach was seen at the turn of the century but has more recently moved back to a more leader-centric style,

possibly driven by economic drivers (Bratton, 2023b). If one agrees with Kapoor, Noida and Agnihotri (2015) that the skills needed to lead in complex organisations – be they for- or not-for-profit – are unlikely to be found in one individual, then a shared approach is the most logical and effective way to lead. That said, there is a view that volunteer leadership/management is undervalued (Nesbit *et al* 2016) and this is supported by the lack of research (Posner, 2015). Another suitable approach for the voluntary sector is servant leadership (Erdurmazli, 2019) and Greenleaf and Spears (2002) make the distinction, also made by others, that leadership can be demonstrated by anyone in an organisation, regardless of their role. However, as with shared/distributed leadership, there has been limited adoption within the for-profit sector. Other theories based on relationships such as situational leadership and LMX may be appropriate but reflect an employment relationship, meaning their applicability in a voluntary setting is unclear.

The lack of research into leadership and management in volunteering extends to how volunteers are managed in spite of the fact there is agreement that managing staff and volunteers is different (Handy, 1990; Einolf, 2018); what research there is focuses almost exclusively on staff managing volunteers with little into what leadership looks like for VVMs (Posner, 2015). This is reflected in the lack of research into LMD for volunteer managers generally and VVMs specifically; where LMD is available it is for senior and executive level staff. Training for paid volunteer managers often focuses on tasks such as recruitment and selection; there is little, if anything, offered for VVMs.

Whilst the need to present an appropriate emotional response that may not align with your views is a common requirement in leadership roles, emotional labour is barely considered in leadership literature although it may contribute to staff turnover within the voluntary sector (Ertas, 2019). If there is to be an understanding of what motivates volunteers to take on leadership and management roles, then it would seem critical to understand the impact of emotional labour on them. This is also overlooked in LMD although Greene and Ward (2016) clearly identify that there are higher emotional demands when managing volunteers, due to the lack of formal employment relationship.

Leadership and management learning and development is subject to the same challenges in terminology as leadership and management with the additional challenge of interchangeable use of the terms training, development and learning. If as Iszatt-White and Saunders (2017) state, leadership has superseded management as an organisational differentiator, this would explain the growth in leadership development programmes. Whilst this is evident in the voluntary sector at CEO level, there is very little evidence of it below Trustee Board level (Alizadeh *et al*, 2021). Effective LMD needs to be specific to the organisation and linked to the strategy and culture of the organisation – further evidence that relying on development across sectors risks being less effective or potentially damaging. A range of sources draw a distinction between leaders and leadership and different approaches to developing a range of skills and behaviours. Observing others' behaviour, reflecting on this and applying it to one's own leadership practice is noted in older research (Kempster, 2006) but little appears to have been done since and it is notably absent from the textbooks used in this thesis. This, along with the emotional labour required in leading would seem to be gaps where further research could be beneficial to paid and voluntary managers and leaders.

Developing leadership skills features in the voluntary sector literature but the majority of the research is again in the for-profit sector and as noted elsewhere, will therefore focus on areas which do not apply at all or in the same way in a voluntary setting. There are conflicting views on the best leadership approach in the sector, with authors such as Terry, Rees and Jacklin-Jarvis (2020) identifying shared leadership approach and others such as De Clerck *et al* (2021) suggesting transformational leadership. Again these are usually considering paid staff and often at senior level rather than at a middle-management equivalent level. A traditional hierarchical structure and approach makes developing behaviours aligned with shared and servant leadership much more difficult and relational skills are less transferable from training to workplace than management skills (Barends *et al*, 2023), adding to the challenge.

How leadership/management skills are developed is also plagued by a lack of agreement. Some view traditional HR approaches as effective and appropriate whilst others (Warner, Newland and Green, 2011) suggest that a more consumer behaviour perspective is more fitting as volunteering is a leisure activity. Different

discourses influence the what and how of LMD delivery but there is limited emphasis on the use of the training cycle and both learning needs analysis and evaluation are largely ignored. Both formal and informal learning are seen as important and there is broad agreement that activities encouraging reflection e.g. coaching, mentoring, action learning are effective LMD strategies. Experiential learning is also critical, supporting the need for both on-the-job and off-the-job learning.

Overall the chapter identifies that whilst there is a body of literature and research into leadership, management and development of these skills, there is little specifically related to the voluntary sector and even less to volunteers managing other volunteers. This chapter therefore confirms the lack of research into volunteer leadership/management and the development of skills to support these roles. It builds on some of the key themes, providing further evidence for the need for a more shared/distributed leadership approach in the sector and draws some new conclusions about the lack of consideration of emotional labour in voluntary leadership roles generally, which does not seem to have been identified elsewhere. This demonstrates there are a number of gaps for further research here.

6.4 Summary of Methodology (Chapter 4)

When undertaking any research, an understanding of the approach taken by the researcher is a key requirement. Writing this chapter was the single least favourite and most challenging aspect of the whole thesis. This was mostly due to the obfuscatory nature of the language used, where the same words were used to describe both ontological and epistemological concepts. Understanding challenging concepts is just made more difficult with this overarching lack of clarity and added to the time and effort required to complete this.

The chapter identifies the research paradigm including positionality and the methods used to gather and analyse the data. It outlines the research organisations, how they were identified and participants chosen and considers the ethical implications of this research.

Since the axiology outlines the researcher's background and how these have formed a set of beliefs about life and the world around us, the view that there are different

views of reality and that the experiences and perspectives of research participants is a natural one to be taken in this thesis. A relativist ontology feeds naturally from this position (Guba and Lincoln, 1994). Epistemologically, the work has elements of interpretivist – how the researcher understands the information - and constructivist – how the individuals experience their roles (Dudovskiy, 2019). However a pure subjectivist approach did not fit with the need to consider how external, objective factors such as organisational realities influenced participants' views. This led to a critical realist paradigm being identified as the best fit. It allows researcher subjectivity to be accepted and pluralist approach used as well as recognising that whilst the individual volunteers' experiences will be unique to them, they will be influenced by factors such as organisation structure and culture. Understanding positionality is important (Berkovic *et al*, 2020) to ensure that the researcher is aware of their influence on the research and the participants and how to mitigate or manage this. Being a long-standing Samaritans volunteer was potentially a help and a hindrance here as it gave the researcher volunteering in common, however there was also the risk of the researcher's experience and views influencing how questions were posed or answers interpreted.

Much HR research (Hesketh and Fleetwood, 2006) and leadership research (Dudovskiy, 2019) is positivist and uses quantitative tools but this research seeks to identify the rich data from individual experience which requires a qualitative approach. Focus groups and interviews were considered initially as primary research tools to shape the research as it occurred (Bryman and Bell, 2015; Saunders *et al*, 2016), but the challenges of finding participants and organisations willing to engage in the research through the Covid-19 pandemic meant that focus groups would have been impossible to organise and facilitate. This also had an impact on sampling, which although purposive (Bryman and Bell, 2015) was narrower than preferred. The interview questions were designed based on a combination of gaps and/or issues identified by the literature and the researcher's own experience as a volunteer. Credibility, transferability and other aspects of valid research were also considered (Saunders, Lewis and Thornhill, 2019). Data analysis was done manually, using paper and highlighter and spreadsheets. This was chosen as it increased the researcher's familiarity with the breadth and depth of the research through regular revisiting. The data was analysed thematically (Braun and

Clarke, 2006), with these being initially based on the questions and then refined to highlight areas where additional themes became obvious during the interviews and subsequent analysis.

Overall 16 participants were interviewed, eight from Samaritans and one each from eight other voluntary organisations. A table shows more details of the participants and their organisations.

This chapter further confirms that identifying the most appropriate paradigm for research is complex. The critical realist approach builds on the body of work already using this to consider qualitative research in leadership and management research, rather than the quantitative approach more frequently used in the sector (Scott and Russell, 2005; Hardwick, Anderson, Cooper, 2015).

6.5 Summary of Analysis of Primary Data and Discussion (Chapter 5)

In this chapter, the analysis and accompanying discussion considered the research in relation to a variety of themes; initially these were drafted into a table whereby conclusions were drawn from each theme and recommendations were considered (Appendix H). These were then linked to existing literature. This process identified that the some of the same conclusions could be drawn from more than one theme and that several of the conclusions would be addressed by the same recommendations. For this reason the conclusions are listed below and a note made of which themes they relate to. The recommendations are then presented and linked to the conclusions/themes which they address.

6.5.1 Conclusion 1 – Individual Understanding of Leadership and Management

As outlined in Theme B (Organisational and individual understanding of Leadership and Management), the VVMs involved in this research were clear on their individual understanding of the terms leadership, being about engaging with and supporting others (Gill, 2011) and management being about structure and process (Robbins, Judge and Campbell, 2017) and were able to articulate this clearly. Their definitions

broadly aligned with accepted definitions of these terms. This was regardless of whether any LMD received had been in a paid or volunteering role and was also common across a wide variation of volunteering and paid experience.

This demonstrates that these definitions are widely accepted across the sectors and that they are widely understood and accepted, providing further confirmation of the ubiquity of the terms. This provides a sound starting point for volunteering organisations to develop their VVMs and should also reassure them that there is a commonality both within and outside of the sector.

There is no recommendation to be drawn from this conclusion.

6.5.2 Conclusion 2 – Organisational Clarity and Communication re Leadership and Management

In contrast to the individual understanding Theme B also evidenced that participants felt there was a lack of common understanding between themselves and the organisations in relation to what the terms meant and specifically how that related to the VVM roles themselves. There was a perception of a lack of clear communication on whether VVM roles were meant to be management (task) or leadership (role) focused and also what the balance might need to be to make the role effective. This led to a risk that a desire for the role to be a leadership role was overwhelmed by the reality of that role being predominantly management, in turn leading to uncertainty about the nature of the role and the balance of people and task activity involved within this. This underlines the importance of Mintzberg's view that the two skills are necessary and complementary (Buchanan and Huczynski, 2019) and the need to integrate the roles for organisational effectiveness (Yukl and Lepsinger, 2015). This has the further potential to make attracting and retaining volunteers in VM roles more challenging as meaningful roles support retention (Einolf, 2018). Fundamental to this lack of clarity was a view that the organisations – and the author would posit, by association, senior leadership within the organisations – had either not considered this or were themselves unsure. Size of the organisation is a factor here, as there was more likelihood of clarity, or at least an organisational assumption of clarity, from larger organisations whereas participants in smaller organisations saw little or no distinction.

In contrast to much of the literature which, as noted elsewhere in this thesis, tends previously to have focused almost exclusively on management activities and more recently to have focused with equal single-mindedness on leadership, the participants in this research identified that their roles require a balance of both leadership and management activities (Theme D - What the role is all about). As such, clarity of terminology and activities would seem to be paramount, again reinforcing Mintzberg's view (Buchanan and Huczynski, 2019) and those of Yukl and Lepsinger (2015) noted above.

Part of this consideration of what a VVM role looks like provides an opportunity to focus on the right kind of leadership and this research supports the view of a shared, relational approach to leadership as being the most appropriate for leading/managing volunteers, as outlined by Terry, Rees and Jacklin-Jarvis (2020) and Mumbi and Obembe (2022) amongst others. Adopting a shared leadership approach would ensure clear messaging for all in the organisation, as a lack of clarity presents risks to the organisation, particularly where VVMs are key to delivering wider organisational goals and achieving strategic objectives. If there is a lack of clarity and consistency relating to what leadership and management mean, how can there be certainty that VVMs are delivering these goals as the organisation views them? And if the delivery is not in line with organisational views, this could negatively impact the achievement of wider goals.

6.5.3 Recommendation 2 - Organisational Clarity and Communication re Leadership and Management

To ensure that VVMs can support the achievement of organisational objectives, it needs to be clear from Trustee Board and Senior Executive level down through both staff and volunteer levels whether VVM and other senior volunteering roles are meant to be either leadership or management or a combination of both, providing necessary clarity (Iszatt-White and Saunders, 2017; Page-Tickell, 2017). This will require an organisational understanding of what the terms are used for internally – for example, job titles often use the word manager but include leadership activities as well. There is an assumption in workplaces that this is understood; if the voluntary sector is to attract and retain more diverse volunteer leaders, it is important

to challenge these assumptions and develop a higher level of clarity. In turn it will be easier to stipulate which skills are required for VVM or senior volunteer roles and provide volunteers with a more realistic idea of the role.

This will allow organisations to understand the links between organisational effectiveness and leadership effectiveness, something which does not appear to be measured (Posner, 2015) but could particularly help volunteer-delivered organisations.

This research confirms that shared leadership is the most appropriate leadership approach to support capacity building and recruitment issues. Additionally, current practice could do more to support retention through clarity of purpose for VVMs. It broadly supports the views that more research is needed; Jäger, Kreutzer and Beyes (2009) noted that there was a lot of volunteer management research but little in volunteer leadership, in the intervening years research is now firmly on leadership. However, a new observation is that roles which include both management and leadership have been overlooked in research in both the voluntary and for-profit sectors.

It also builds on developing a clearer view of leadership, management and VVM roles, supporting strategic effectiveness of the organisation (Posner, 2015).

Jacklin-Jarvis and Rees (2022) identify the importance of collective leadership for relational and overlapping roles with small groups. To an extent this builds on Freund's (2017) observations about shared leadership and its efficacy in nonprofits. New findings from this research suggest that this is not just relevant to smaller organisations. Larger volunteer-led and service-delivered organisations do not always have sufficient resource to meet all the leadership needs they have as recruitment into VVM roles is challenging. A specific example is Samaritans, where many of the tasks required to run a branch are the same and require a similar number of role holders whether a branch has 10 volunteers or 100.

6.5.4 Conclusion 3 – Role Documentation

Overall the use of documentation such as role descriptions to support VVM roles was patchy at best. Theme A (Role titles and descriptions) identified that in larger

organisations these were more likely to be present although accuracy in relation to the role itself was questioned, with some participants feeling the these did not accurately document the breadth of the role. The literature highlights the benefits of clear role information (Nesbit *et al*, 2016; Einolf, 2018). There was an understanding of what was required in the role, as outlined in theme D, but it was evident from responses that this had developed either through time served in their VVM role or from observation of leadership roles, often in a deputy or supporting role. This evidences the importance of consistent and accurate role information when recruiting VVMs, particularly to ensure that tasks and motivations match (Einolf, 2018).

The importance of role documentation is further highlighted in theme G (Appointment to role and expectations) where its use in the literature is highlighted to support realistic expectations for those interested in or being appointed to VVM roles, although the lack of documentation is not unusual (Jäger, Kreutzer and Beyes, 2009). It also supports a more robust process for appointment of VVMs as there was only minimal evidence of good practice in relation to choosing new VVMs. This impacts on succession planning/progression and capacity issues, an ongoing challenge in the sector (Freund, 2017), since incomplete or missing role documentation may act as a barrier to those who currently lack the skills but with the right support could grow into a VVM role, supporting the development of leadership and not just leaders (Jacklin-Jarvis *et al*, 2022). Additionally this will, along with a lack of proper resourcing, negatively impact any aims to have a more diverse pool of VVMs, a concern raised in theme H (What is involved in the role) as well. Without more clarity about VVM roles and expectations, it is impossible to see how the need for these roles and volunteers to do them will be found.

It can be seen that there is a requirement both from the literature and the primary research for clarity to ensure existing VVMs can carry out their roles effectively and to support a growing, diverse pool of actual and potential VVMs whilst avoiding an overtly professionalised approach which could have the opposite effect.

6.5.5 Recommendations 3 – Role Documentation

Organisations need not only to be clear about what is involved in a role but have it documented in an appropriate way. For a larger organisation that might be a full role

description for a complex VVM role whilst for a smaller charity a couple of lines outlining what management tasks and leadership expectations are required from the role might suffice. Other information specific to the organisation and role, such as the time needed to do the role could be included as necessary. Providing clear information will allow potential VVMs to understand what is involved in the role, improving recruitment supporting capacity building (Freund, 2017) and improving volunteer experience (Nesbit *et al*, 2016). It would also provide a basis for a discussion for those new in post about development needs and support. This would also ensure that as a role changes, the expectations of current and potential future role holders can be managed effectively and any training/development amended as required.

This recommendation encourages the development of a shared leadership approach (Mumbi and Obembe, 2022), making the leadership activities visible to a wider audience in the organisation (Terry, Rees and Jacklin-Jarvis, 2020) and further supporting capacity building within organisations.

Here there is confirmation that there is an expectation of professional management (De Clerck *et al*, 2021) and use of some HRM practices in the sector (Einolf, 2018) and that these provide a better experience for volunteers (Nesbit *et al*, 2016) better experience for volunteers. New findings here relate to the lack of and need for role documentation to support volunteer recruitment and retention in spite of some of the fears of professionalisation.

6.5.6 Conclusion 4 – Acquisition of Leadership and Management Skills

There appears to be an implicit expectation within the sector that VVMs bring their leadership and management skills with them from outside their volunteering roles i.e. from paid employment. This was evidenced in Theme F (sources of experience and learning of wider leadership and management), Theme H and Theme I (What support did you have), where most participants stated they already had these skills and for some this was a prerequisite. Effectively almost half of the participants were accidental managers, as they had received little or no formal management training within their paid employment (CMI, 2023) and only half were offered or received training in their role, with the majority of these being Samaritans volunteers. Around

three quarters of those who did receive it, found it inadequate in some way. Larger organisations are more likely to offer LMD whereas smaller organisations tended to focus on the provision of mandatory training only.

Theme I identified that although mentoring was offered to nearly half of the participants, 50% of these said the match was poor and consequently they made limited use of this support. This highlights the need for mentoring to be done in a structured way and the process managed if the full benefits are to be experienced (Connor and Pokora, 2017; Garvey, Stokes and Megginson, 2018). Most VVMs developed or acquired the necessary skills to lead and manage effectively in their VM role through predominantly informal approaches and since no learning needs analysis was undertaken by any participants, these skills gaps were self-identified. The literature implicitly or explicitly assumes that a manager or HR/L&D professional carries out the analysis e.g. Beevers, Rea and Hayden (2020) it is not unreasonable to assume that it is therefore deemed more appropriate. The approach seen here relies on an individual's self-awareness and honesty and offers only a one-dimensional view which can be limiting. A further danger here is that the lack of role information means that any gap analysis may miss critical development areas for VVMs.

In spite of the lack of consistent learning needs analysis and provision of training/development, all the participants felt well-equipped to do their VVM role (Theme J – how well equipped/skilled do you feel now?). Where interventions had been provided, there was very little evidence of informal follow-up and only three of the participants who had received LMD to support their VVM role were able to recall any formal evaluation taking place. Of these, only one stated this had gone beyond checking if they had found the training helpful i.e. level 1 Kirkpatrick (Beevers, Rea and Hayden, 2020). However, without accurate role information and a robust learning needs analysis, it would be impossible to undertake meaningful evaluation at any level (Patterson *et al*, 2017).

Whilst there is evidence from this research and broadly from the literature that the skills learned in paid employment are transferable to a VVM role, participants agreed that a level of adaptation was required to be effective. All VVMs had been volunteers for some time in their organisations, meaning they had a good understanding of what

adaptations would be required. However without LNA and a clear role outline there is a risk on relying on this approach. The apparently inherent assumption that this will continue to work is surely a highly risky one considering the changes we are seeing with recruitment and retention challenges (Einolf, 2018; Alizadeh *et al*, 2021), increased short-term and micro-volunteering (Tabassum, 2023) and the move, as seen by this researcher, to become more inclusive by recruiting for VVM roles outside of the organisation.

The provision of some kind of formalised learning and development/training is important for VVMs and their organisations, as training in the for-profit sector and third sector will have different foci. For example, leadership development in for-profits is unlikely to focus on a shared leadership approach (Bratton, 2023b), which has already been identified as the most suitable style for voluntary organisations. Consideration of areas such as finance will also be very different in for-profit environments. As outlined elsewhere in this thesis, there are significant differences in how volunteers and paid staff engage with the organisation and their activities (Greene and Ward, 2016) and consequently how they should be managed (Dwyer *et al*, 2013; Posner, 2015). These and other cultural differences will also not be considered in for-profit leadership/management development activities. In this author's view, these differences could potentially be damaging to volunteer management and leadership and voluntary organisations but without data, there is no evidence to support this view. This could be a topic for further research.

The literature states a balance of formal and informal leadership development is best and there is some evidence of this taking place, with many participants engaging in self-directed learning such as buddying, informal networking and reflecting on observation of others' good and bad practice (Mumford and Gold, 2004; Knowles, Holton and Swanson, 2005; Mündel and Schugurensky, 2008; Fullwood and Rowley, 2021; Palanski, Hammond and Khazanchi, 2022).

Overall there is a lack of robust learning needs/gap analysis and a reliance on self-identification based on often incomplete role information. This is combined with inconsistent provision of appropriate LMD for VVMs, a fact also noted by Alizadeh *et al* (2021). However there is a risk in having untrained or inadequately trained and supported VVMs, not just for the quality of leadership offered to volunteers and its

effect on volunteer retention and motivation but also for the achievement of wider organisational strategy.

6.5.7 Recommendation 4 – Acquisition of Leadership and Management Skills

Provision of appropriate training/development for VVMs is critical. A helpful starting point would be identifying if the attitudes and experience VVMs bring are suitable for their VVM role within the specific organisation. Where they have had prior LMD and experience, ensuring they understand the differences between managing employees and managing volunteers and have the skills to adapt to this context is necessary (Fullwood and Rowley, 2021). This avoids the risk of making assumptions about existing skill levels and will allow a more accurate picture of what LMD is required.

Having a robust LNA process is critical since it not only links to the culture and leadership/management behaviours the organisation wants to see, ensures individual needs are met (Gill, 2011; Choi and Park, 2024) but also provides a starting point for evaluation. Using the role documentation outlined in the previous recommendation, conversations to identify learning needs should be carried out by someone who understands the role and what learning and development is available and appropriate, rather than through self-identification. This does not need to be a detailed LNA or skills audit unless necessary; for smaller organisations, a simpler document would suffice. This then forms the basis for the relevant skill development and should allow for a relational/shared leadership approach for effective volunteer leadership (Freund, 2017; Mumbi and Obembe, 2022). It also prevents voluntary organisations from perpetuating the issue of accidental managers and the costs often associated with them (CMI, 2023).

Clarity about the right approach to learning and development, the right content for the organisation and individuals and the right time to engage with it is critical, as is avoiding a “sheep dip” approach, where everyone gets all the training available whether they need it or not! To do this, organisations will need a clear plan of what development they are able to provide and where VVMs can access learning that is needed but not provided. This could be through collaboration with others and/or signposting to resources or individuals who can help. Organisations also need to be more open to the value and importance of informal learning (Mündel and

Schugurensky, 2008; Palanski, Hammond and Khazanchi, 2022) and encourage VVMs to continuously develop to support longer term progression.

As a mix of formal and informal learning interventions provide the best outcome, organisations will have to identify which they are best placed to deliver, what they may need to outsource and also consider sharing resources with other organisations through umbrella organisations such as ACEVO or AVM or using other freely available resources, although these risk being more generic and less suitable for specific organisations. Whilst a formal LMD programme run by a private provider or Higher Education Institution may be the right choice for some organisations, a bespoke offering with a range of smaller learning opportunities will be more feasible for many. Formal offerings such as structured mentoring alongside informal activities such as networking ensure a good balance and both from this research and the literature are deemed effective (Fullwood and Rowley, 2021; Watt, Boak and Gold, 2023). There should also be thought given to how VVMs can be supported in the building of informal networks.

Starting with a clear picture of what skills are needed and identifying how to fill these gaps will then allow an appropriate level of evaluation of the whole process to take place, and particularly of the solutions themselves. For example, holding regular catch ups with the VVMs to check how their development is going, how they are applying what they are learning and what other challenges/gaps they are identifying along the way would all contribute to an understanding of the efficacy of the learning interventions. This would prevent precious resources being wasted (Henriksen and Borgesen, 2016). In business there is often a desire to have a financial measure, but volunteers' time is equally an important resource that should be used as effectively as possible. Evaluation is often ignored but is a key part of the process (Kirkpatrick and Kirkpatrick, 2010; Beevers, Rea and Hayden, 2020; Watt, Boak and Gold, 2023). The Lead Volunteer L&D Checklist (Appendix I) can be used to address this.

One advantage of knowing what is involved in a VVM role and providing the right supports could make the roles more attractive to a wider range of volunteers, which would support a more diverse VVM population. Other steps, outside the scope of this research, would also need to be taken to increase VVM diversity.

Ivanoska Hadjiesvka, Johansson and Altermark (2023) review formal LMD, but this is for paid staff, not volunteer roles. The lack of consistent LMD for VVMs confirms Alizadeh *et al*'s (2021) research.

The widespread lack of formal gap analysis; specific, tailored learning interventions and appropriate evaluation in both large and small organisations, as well as the highlighted risk this brings is most likely a new finding since this does not appear to have been researched elsewhere. These are addressed in the recommendations and although the suggestions for a robust application of the training cycle is not new, the Lead Volunteer L&D Checklist is a new tool to ensure VVMs are better prepared for their role.

The need for a balance of formal and informal learning and for interventions such as mentoring to be formally supported builds on existing literature (Fullwood and Rowley, 2021) by evidencing the need in the voluntary sector as in a for-profit environment.

6.5.8 Conclusion 5 – Emotional Labour in VVM

One question which was originally considered peripheral to the research is the consideration of emotional labour in managing volunteers compared to managing paid staff, discussed in theme E (Emotional labour in VVM). The literature on emotional labour in leadership and management generally is very limited, but the little that was found identified that leadership does require a level of emotional labour (Humphrey, Pollack and Hawver, 2008). There is however even less written about this in terms of a place in leadership development. As many of the participants had held management/leadership roles in paid employment, they were able to provide a meaningful comparison of their experiences and there was a very strong agreement that working with volunteers requires significantly more emotional labour. This was related to the additional effort required to engage and motivate volunteers, particularly since their motivations are more likely to be intrinsic (Greene and Ward, 2016). This further supports the difference between paid VMs and VVMs and their relationships with volunteers. The literature identifies that there is a risk of higher burnout in paid VMs due to this (Nesbit *et al*, 2016); it is not unreasonable to assume that the impact will be at least as bad, or potentially worse on VVMs due to their

different level of commitment to the organisation. However this is a further area where there is a scarcity of research.

6.5.9 Recommendation 5 – Emotional Labour in VVM

As part of the need to document what is involved in a VVM role, it is necessary to acknowledge the emotional labour element of the role in suitable, supportive language. If potential VVMs can see that this is part of the role, they can make informed decisions about their desire and suitability to do the role. Its importance as a leadership skill, as well as the lack of consideration is discussed by Humphrey, Pollack and Hawver (2008). Organisations should then consider how they can help potential and existing VVMs develop their resilience to manage the emotional labour required to do the role which in turn will support retention and capacity building (Freund, 2017). Honesty about the role may deter some but should also improve the quality of VVMs overall as they will be aware of what they are committing to.

Considering how to embed this into the recruitment process for VVMs would be a further step to support VVM wellbeing.

This conclusion identifies the lack of consideration of emotional labour in the wider leadership literature, confirming and building on Humphrey, Pollack and Hawver's (2008) observation. It also reinforces the importance of additional emotional labour required to manage volunteers (Greene and Ward, 2016).

6.5.10 Conclusion 6 - Changes to Improve VVM Development

The participants in this research identified a range of changes which they felt would help VVMs be more effective (Theme K – What leadership and management development provision would help VVMs be more effective in their role?) and although many of these would align with accepted good practice in L&D generally, some of them are specific to the volunteering sphere. Accepted L&D approaches included the need for a robust LNA and/or skills audit to support development of personalised learning for the VVM, supported by formal structured mentoring

(Fullwood and Rowley, 2021). The right content for the individual, consideration of both general management (task) and interpersonal (leadership) skills and relating this to the organisational context were highlighted (Iszatt-White and Saunders, 2017; Page-Tickell, 2017). Timeliness to undertake, reflect on and apply learning was another common theme. The importance of handovers was highlighted by a number of participants as were activities that supported more diversity in succession planning for VVMs although this is an aspect that does not figure significantly in the literature used in this research. The literature also suggests that application of skills specifically within the sector and using knowledge building to support succession planning and help offset changes in volunteering habits are important; these support the developments suggested by the participants.

6.5.11 Recommendation 6 – Changes to Improve VVM Development

These recommendations are from the participants' suggestions and capture some recommendations already made above. They are reiterated here as they show a definite link between what the theory says and what actual practitioners believe would make a difference to their VVM experience. Ensuring LMD is systematically integrated into organisational processes is a critical starting point (Barends *et al*, 2023).

A formalised, timely and sufficient handover process is needed so that information does not slip into the gaps between different role holders.

A robust learning needs analysis is needed (Gill, 2011; Patterson *et al*, 2017; Beevers, Rea and Hayden, 2020; Choi and Park, 2024) this will help manage different levels of experience of incoming VVMs.

Context and content of the learning provided should be organisation specific as well as individually personalised so that VVMS are trained and supported to develop the necessary skills. As relational skills are less transferable from training to workplace when compared to general management skills (Barends *et al*, 2023), an individually tailored solution as outlined here will be more effective.

This research demonstrates how the VVM role at this level is a mix of leadership and management tasks (Rochester, Paine and Howlett, 2010; Bezboruah, 2011).

Effective leadership development should include general management and interpersonal skills (Bosley and Gifford, 2023), and for volunteer managers, the ability to manage higher levels of emotional content is significantly more important (Greene and Ward, 2016).

Timeliness of the learning for the role is critical, as is allowing VVMs the time to engage in the learning. This includes using a range of different approaches, delivering the learning over time, matching the pace and need of the VVM and enabling the learning to be embedded. Where possible, this should also include providing time and space to practice and develop new skills, during and after a learning event and in a safe environment. This will enhance the effectiveness (Bosley and Gifford, 2023).

Formal learning approaches were eschewed by the participants, apart from mentoring which was deemed by many as a key approach. This supports the suitability of mentoring as a support mechanism in LMD (Coetzer *et al*, 2011; Watt, Boak and Gold, 2023). It is more likely to be effective than off-site LMD (Iszatt-White and Saunders, 2017) because it is most likely to take place in situations related directly to the VVMs role. Mentoring programmes need to be fit for purpose and organisations should decide if mentoring is optional or mandatory and structure it accordingly – including training and supporting mentors adequately. It can also be helpful for leaders and leadership teams (Garvey, Stokes and Megginson, 2018). As well as featuring heavily in business contexts (Carroll, 2015): Connor and Pokora, 2017; Watt, Boak and Gold, 2023) mentoring is also a principal part of LMD in voluntary settings (Gill, 2011; Fullwood and Rowley, 2021) where it can provide a safe space for discussions and reflection.

Although the term shared leadership was not used by any of the participants, much of what they identified aligns with developing middle-management/leadership skills in the voluntary sector (Jacklin-Jarvis *et al*, 2022) such as a range of self-directed, group and individual learning.

Much of what the participants suggested here reflects good L&D practice and confirms the need to develop these practices consistently within the voluntary sector for VVMs at middle-management level. L&D for volunteers at this level complements Jacklin-Jarvis *et al*'s (2022) work with volunteer leaders at this level although the

focus in this research is different, adding new findings. Their work is about open access resources, whilst this research is about more specific individual needs and how organisations can offer internal support for VVMs. Some aspects such as handover processes, timeliness and the need for L&D to consider both leadership and management skills are new considerations, whilst others such as the need for a focus on relational skills, dealing with increased emotional content and providing a range of options to be used at the individual's own pace, build on others' work in this field.

6.5.12 Conclusion 7 – Feelings About the Role

The final and perhaps most important conclusion to be drawn from this research is that in spite of the challenges involved in the wide range of skills required to do the role and engage with volunteers, the VVM role is a worthwhile role, with participants loving or enjoying the role, wanting to continue in the role and finding it a privilege and humbling experience, as outlined in Theme C (views and feelings about the role). This seems to play a significant part in the motivation to undertake the role and to continue with it. The commitment to the organisation, its aims and values remain important whilst the desire to support volunteers locally and the wider organisation through taking on a VVM role is also key here.

6.5.13 Recommendation 7 - Feelings about the role

Although role documentation is important in helping potential and actual VVMs understand skills and behaviours required, it is important to remember that volunteering is an intrinsically motivated activity and that the motivations for this are different for those of paid staff (Anheier, 2014). Enjoying the role is, for these participants, a key factor in their taking on the role and recognising that developing new skills and personal achievements are fundamental to the exchange made is important (Anheier, 2014). Liao-Troth (2012) notes that identifying motivators for volunteers is key to volunteer management; therefore understanding motivation and meeting these needs for VVMs must surely be important for senior leaders and teams who appoint, develop and work with VVMs.

The finding that volunteering has different motivators from paid work is not new, so this work confirms this (Anheier, 2014). Confirming it specifically in relation to volunteers in leadership and management roles builds on limited research (Posner, 2015, Greene and Ward, 2016). New knowledge here relates to the enjoyment of the role once it is taken up, which has not been explored before.

6.6 Overarching Conclusions

Whilst the discussion above is based on informal conversations and semi-structured interviews, there are also a number of observations and conclusions which can be drawn from the wider thesis and the author's experience in researching it, both in terms of the literature and the primary research itself.

There is evidence that volunteering and attitudes to it are changing (Kanemura, Chan and Farrow, 2022; May, 2023; Rich and Lapshynov, 2023; Oliver, 2024) for example micro and informal volunteering are increasing. These changes could encourage a more diverse range of people to volunteer which would be really positive for both individuals and organisations; a search on the "benefits of volunteering" produces results from Oxfam, Citizens Advice, Royal Voluntary Service and Gov.uk and the need to recruit and retain volunteers is explored above (Einolf, 2018; Alizadeh *et al*, 2021). Anecdotal evidence – in the absence of any research – points also to the increase in senior volunteering roles where volunteers will take on leadership/management responsibilities. This information adds to our knowledge of what is changing within the sector. Without a strategic level plan to ensure these volunteers have the skills and behaviours necessary, it is difficult to see how this can be effective.

To do this, organisations would benefit from making VVM roles more flexible and shared leadership would seem to be the most effective way to do this, spreading the load and the skill development. As a sector we need to consider how we can develop and support those in volunteering roles without any leadership/management expectation or previous experience and in lower level VVM roles e.g. deputy directors within Samaritans. This would support the pipeline for future VVMs (Freund, 2017). As part of this we also need to examine our current leadership structure, processes and learning/training approach and how this does – or perhaps

does not – support succession planning. This research builds on the above earlier knowledge.

We say in the sector that we want more diversity, particularly in leadership roles (Alizedah *et al*, 2021) but what we currently do seems to perpetuate what we already have and who we currently are. All of these would support a more diverse group of VVMs, by making the roles more accessible and attractive to a wider range of volunteers.

On reflection, perhaps the most significant conclusion that this researcher has drawn from this research is about the longer-term risks posed by the sector's failure to implement what is accepted as good practice in L&D and LMD in the literature. The pulling together of the evidence gained from this research and lived experience highlights a challenge not acknowledged elsewhere in the literature.

The above good practice has been clearly identified by the participants as being necessary and beneficial, even though so many of them brought leadership/management experience with them from their workplaces. This, other findings from this research, and the literature clearly demonstrates that managing/leading volunteers is not the same as paid staff (Jäger, Kreutzer and Beyes, 2009; Palanski, Hammond and Khazanchi, 2022) yet we continue – either explicitly through role expectations or implicitly through lack of L&D provision – to expect volunteers to bring leadership/management skills with them from their paid work. This finding too is new.

All the participants in this research had been volunteers with their organisations for a period of time before taking on a VVM role and were all fully cognisant of the differences from their time both as volunteers, and in many cases from observing others in VVM roles, an accepted leadership/management learning approach (Kempster, 2006; Fryling, Johnston and Hayes, 2011; Johnson, 2018). This would suggest that these VVMs have adapted their leadership/management approach to engage with volunteers, including an acceptance of the need for higher emotional labour and are willing and able to do this. They also understand the organisation's values, culture, strategy and goals, all of which are linked (Handy, 1990) and unique, and felt able to articulate and implement these. They demonstrated an understanding of the expectations that volunteers have, their motivations and the

differences in the relationship. As an experienced VVM, I can confirm that all of this will have been significantly influenced by their time as a volunteer within the organisation. For many of these participants the lack of leadership/management development for their VVM role has been either inconsequential or a fairly minor challenge, at least according to them, although it would also have been interesting to see what their followers thought of them as leaders.

However if organisations start to engage volunteers directly into VVM roles from outside the organisation and continue to offer no, minimal, inappropriate or insufficient leadership/management development, they increase the risk of accidental managers and the damage they cause (CMI, 2023). Without experience in the organisation, new VVMs will need to rely on effective LMD to support their understanding of organisational culture (Gill, 2011) and how to be an effective leader of volunteers within this organisation. A number of interview participants alluded to this when commenting on the shared understanding between volunteers and volunteers who led/managed them and P14 who works and volunteers in the sector felt very strongly that organisational cultural understanding was important for leaders “I don't see that it would work for somebody to come in from the outside and take our lead volunteer role, even if they'd had that experience and another XXX...because [of] the relationships within each volunteer team.” He expanded on this to include bringing leadership skills from outside the sector: “And so because the people who do this have tended to hold fairly senior roles within this kind of specialism...they bring management experience, which sometimes has to be toned down a little bit...to get them to realise that they are actually working with volunteers and they do need to be treated perhaps a little differently to paid workers.” He offered a specific example of a director from a local company “they came and joined...his experience had very much been around managing supporting...brilliant bloke and superb engineer, but he didn't get volunteering for quite a long time and there were some problems with some conflicts and things within the team.”

A paid VM can learn this through immersion in their new job role, whereas a VVM will only have exposure to this in small bursts of time when they are volunteering. Given that relationships with volunteers are more relational and require more emotional labour (Greene and Ward, 2016) this lack of cultural awareness, potential lack of understanding of volunteer management relationships and lack of robust

learning and development could be a recipe for disaster, further exacerbating volunteer recruitment and retention issues.

This is a consideration drawn from the specific aspects of this research and this researcher, thus adding to the limited body of research and knowledge within the voluntary sector.

6.7 Other areas to research

Whilst there are always areas of interest identified when researching – rabbit holes to attract the unwary – there are some specific areas highlighted by this thesis where further research would develop other key topics. Alizadeh *et al* (2021) note that volunteer management is one of the most under researched and least understood areas of volunteering so further research is critical.

The areas most directly connected to this research relate to emotional labour and motivation.

Emotional labour in volunteering has been explored in some specific areas (Greene and Ward, 2016; Ertas, 2019) but awareness of it as an important aspect of volunteer management more generally would help highlight the differences between managing/leading paid staff and volunteers. Research into what skills VVMs need to manage these relationships, how to develop these, the impact on VVMs' emotional wellbeing and how to support them would provide further insight into this under researched aspect of leadership in both for- and non-profit organisations.

Although there is significant research into volunteer motivation in general (Anheier, 2014), research into what motivates someone to take on additional responsibility is negligible. There is some research in the US into how VVM skills can support career progression in paid work (Gordon and Gordon, 2017; Palanski, Hammond and Khazanchi, 2022), but this thesis demonstrates that for most of the participants, their VVM role followed on from their paid leadership/management role or experience. Posner (2015) looks at VVM practices, but there appears to be no research into why they take these roles on initially. It is generally assumed that volunteers are resistant to professionalisation (Rosenfeld and Wilson, 1999; Kreutzer and Jäger, 2011) but most of the participants in this research were aware of the balance between meeting

wider (professional) organisational needs and volunteer (relational) needs, demonstrating that they understood the requirement for professionalisation to be effective in the role (Ellis Paine and Macmillan, 2019). Given this potential difference, further research into what motivates a volunteer to take up a VVM role would provide insights into how best to recruit, develop and retain volunteers in these roles.

Other areas which are more peripheral to this research but have a higher profile in volunteer research generally relate to attraction and diversity of VVMs.

Recruitment for VVM roles has been touched on above. Attracting volunteers into these roles is difficult, retention is challenging and succession planning/capacity building (Freund, 2017) is limited. If shared leadership is to be achieved, we need more people willing and able to engage in leadership activities and once we understand the motivation for taking up such roles, attracting and engaging volunteers should be easier.

Diversity in VVMs was mentioned by a number of participants and whilst this is a current topic of interest, there are many different aspects of diversity. Individual organisations would need to understand what diversity they are seeking and then research what the barriers are for them. It would then be possible to understand how diverse volunteer populations feed into VVM roles. This would help improve diversity in areas such as global majority representation, gender and age demographics and alongside research into motivation and attraction, understand how to open up VVM roles to a wider range of volunteers.

6.8 Limitations

As with all research, what you end up with looks different from what you wanted at the start. For this research a key limitation was Covid-19 which, as explained elsewhere, erased burgeoning relationships with potential organisational participants. This meant that instead of researching how large charities with a volunteer-delivered service supported VVMs, the research relied on half of the participants coming from organisations where the services were a mix of volunteer-

and staff- and volunteer-delivered. Although this could be seen as a benefit, it does mean the results may carry less weight with these kinds of organisation.

Time was a limitation in many ways. Firstly over 18 months was spent trying to find sufficient participants which delayed other elements of the research. Being offered the role of Branch Director was a privilege but in the early months of the term required 15-20 hours per week, which on top of busy job and family commitments made finding time to research a real challenge. The trade-off however was the experience of doing a VVM role whilst researching and engaging with others in a VVM role.

Given how critical volunteers are to organisations, particularly those whose service is volunteer-delivered, one major limitation was the reluctance to engage with research into volunteering. There is an interest in the results but a reluctance to commit resources to the research itself. This will continue to make researching in the sector a challenge.

6.9 Reflections on Research

Overall the reading, research and writing has been an enjoyable process. Sometimes knowing when to stop searching, reading and writing was a challenge. There is extensive information on the voluntary sector and although literature specific to the topic is limited, there is a plethora of research on leadership, management and LMD in business contexts. Having identified the participants, the primary research and data analysis were also very enjoyable and provided a range of insights for me as a researcher and in relation to the research itself.

At the start of the process, given the limited research in the voluntary sector and the challenges of recruiting and retaining volunteers, which I was also aware of from my own volunteering, I was sure that large organisations where volunteers delivered the service, rather than supporting service delivery, would be interested in working with me. And whilst initially this seemed to be the case, ultimately the research was not carried out at an organisational level with any organisation but arranged at a local level. Conversations with senior staff demonstrated their desire for addressing a range of issues related to volunteer leadership and management and their perceived

importance but translating that into commitment never happened. Focusing on the important/not urgent activities requires a commitment of time and discipline (Covey, 1999) and for many organisations the urgent tasks take precedence and the important/not urgent activities get squeezed out until they become urgent. And if they never move into that space, it is doubtful they will get done. It is however hard to see how anything will change and help address the issues voluntary organisations know exist if they do not make engaging in volunteering research a higher priority.

There may be other, implicit or unacknowledged, reasons for not engaging. Once a gap has been identified, there becomes an expectation this is addressed and given the range of financial and other challenges faced by the sector I am left wondering if there is a level of plausible deniability in some of these decisions. The amount of time and effort spent in trying to get voluntary organisations to engage formally with me and the research process felt disproportionately excessive for the scale of the research itself and it is easy to see how this could be a further barrier to research.

This research also made me realise that being a Samaritans volunteer has significantly influenced both my career and me as a person, reflecting Gee's (2017) view of being and becoming. Adapting leadership/management behaviours learned in the workplace into a voluntary environment may have the same impact on other VVMs, whilst using VVM experience to be more effective in your paid work can provide evidence of this.

Volunteering is always going to be a subsidiary activity to family and paid employment and it can appear that there is a lack of understanding from staff about the impact that short lead-time decisions have on volunteers. As a VVM you have first-hand experience of this impact and often have to dilute or mitigate this impact for other volunteers.

I am starting to hear and see more about "one organisation" approaches to people management, whereby staff and volunteer management is overseen by the same department. Given that this research builds on previous work showing that volunteers require different management to paid staff, it will be interesting to see how this is applied in reality to acknowledge these differences, assuming that the organisations making these decisions are aware of this.

Most types of leadership provide a leader in that mould, so transformational leadership gives transformational leaders, servant leadership gives a servant leader. This is not the case with shared or distributed leadership as if you put the “shared” or “distributed” in front of leader, it changes the context significantly. For me this is the essence of this type of leadership – it forces a focus on leadership rather than the individual – and this is what it needs to be effective.

6.10 What has been achieved?

This thesis started with hoped-for contributions to knowledge and practice, research objectives and research questions and this section will reflect on whether these have been achieved.

- Overall there has been a varied and significant contribution to knowledge. There has been a confirmation of the lack of research into volunteer management and associated skill development. confirming the suitability of a shared approach.
- The work has built on existing knowledge relating to management approach in the voluntary sector, further exploring the balance of professional and HR approaches with a follower-centric approach. It confirms others’ views that business leadership/management approaches can transfer but need to be adapted to a different set of priorities and motivations. Approaches rarely used in business are more effective in the voluntary sector.
- Hearing volunteer leaders voices and experiences, what works for them and what does not, from a range of volunteer organisations has contributed new knowledge. Research that is not about CEO or Trustee level leadership/management and that focuses on volunteers not paid staff is also adding new knowledge.
- This work demonstrates that cross-discipline research can benefit both parties. This research can contribute to sociological research, enhancing knowledge of the role and importance of those elements of formalised LM and LMD that are helpful. It can also contribute to business research the knowledge that the voluntary sector is important and business practice could

learn from approaches such as shared leadership. This may be a unique perspective.

- Methodologically, it demonstrates that effective research in the voluntary sector can be undertaken using critical realism.

From a practical perspective a checklist to help large and small voluntary sector organisations identify how best to support and develop VVMs has been developed.

To disseminate this learning, early thoughts were delivered at a conference, preliminary findings were shared in informal conversations with VMs and delivered to the Volunteering Team at Samaritans Central Charity. Future plans include delivering at the 2024 AVM conference and reaching out to other voluntary sector organisations to share the learning.

6.11 Research Objectives

These objectives were achieved albeit with some unexpected outcomes. The literature provided extensive business theory, little specific to the voluntary sector and whilst some of these were applicable, others were not. This is broadly what was expected, although when the proposal was drafted the lack of up-to-date research was worrying. In the last five or six years the range and volume of papers has increased significantly which was unexpected and welcome.

Some participants went through a formal process to be appointed, whilst others did not. This was less surprising given the researcher's own experience. The range of support for acquiring skills was very mixed, from nothing to a large range of comprehensive training and development options. The lack of consistent, appropriate LMD available was slightly more than anticipated but the scale of the implicit assumption that VVMs bring their skills with them was very surprising and much more widespread than anticipated. Where L&D options were available these received mixed reviews with content, timing and processes all being inadequate or ineffective. Again the scale of dissatisfaction with what was provided was not anticipated, a higher level of organisations getting this right was expected but not evidenced. A range of suggestions was made by the participants regarding what would have been more effective and these were used to support the

recommendations. Interestingly many of these were supported by the literature as being most useful but from personal experience are the ones least likely to be provided.

- Interrogate key literature around leadership and management (LM) theories and approaches, and leadership and management development (LMD).
- Identify and analyse the relevance and application of these to the voluntary sector,
- Understand the range of LM roles open to volunteers and establish what LMD opportunities are provided to support skill development in these roles
- Identify whether the opportunities provided meet the needs of volunteers in LM roles, from a theoretical and practical perspective
- Make recommendations regarding good practice in existing LMD approaches, and also possible changes which could benefit volunteers, voluntary organisations and the wider sector in relation to developing LM skills.

6.12 Research Questions

These questions have been answered as follows:

1. How are the terms “Leadership and Management” and “Leadership and Management Development” interpreted in the voluntary sector?
 - a. By individuals in broad agreement with accepted definitions but organisationally with less clarity.
2. What leadership and management roles are volunteers undertaking, and what skills are needed to fulfil these roles?
 - a. A range of roles, but all involve a mix of leadership and management tasks. A range of specific skills was not identified, but the importance of emotional labour was highlighted very strongly.
3. How are leadership and management development skills developed in volunteers and how effective are these approaches?
 - a. It depends! Significant organisational differences in what is offered and the quality and effectiveness of this.
4. How could these approaches be changed or improved to develop volunteers’ leadership and management skills and skill development?

- a. A range of practitioner recommendations were made by participants which broadly fitted with what would be expected to be effective.

The importance of VVMs has been highlighted as higher than I imagined; the level of support was lower than anticipated as was the quality. The importance of emotional labour and VVMs passion and love for their roles was unexpected. There is much here that the sector can do to help their volunteers, and particularly their VVMs be the best they can.

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Appendix A – Ethical Consent Form



Date 1st February 2019

Researcher: Nicola Adams PhD Student [REDACTED]

Title of Research: Identifying Effective Strategies for Developing Leadership and Management Skills in Volunteers

Decision: Your ethics application has been **APPROVED**

Dear Nicola

The Faculty Ethics Committee has approved your application.

Please ensure that you are conversant with the latest guidelines on recruiting research participants and data security. See the Ethics Guidance web pages <https://www.wlv.ac.uk/research/research-policies-procedures--guidelines/ethics-guidance/>

If you make any substantial changes to your research, you will have to complete a new request for ethical approval.

This letter only relates to ethical issues and has no bearing on other aspects of your research, such as methodology and theoretical framework.

Please do not hesitate to contact the relevant representative for your subject on Faculty Ethics Committee if you have any questions.

We wish you the very best with your research.

Yours Sincerely

Sheila Gill

Sheila Gill
Faculty Research Administrator
On behalf of Faculty of Arts, Business & Social Sciences Ethics Committee

Dean: Mr Micheal Barden LLB(SocSci) PGDip LLM FHEA
University of Wolverhampton, Faculty of Arts, Business & Social Sciences, Mary Seacole Building, Nursery Street
City Campus Molineux, Wolverhampton WV1 1AD United Kingdom
T: +44 1902 321000 or 321789 E: enquiries@wlv.ac.uk

UNIVERSITY OF OPPORTUNITY

Appendix B – Timeline for Thesis

Working Timetable

Year	Months	Activities				
2018	February & March	Meetings with supervisor(s)	Work on proposal and submit drafts	Find additional supervisor (meet with LC)	Informal discussion with Samaritans	
	April	Discuss proposal with supervisors for final review	Submit proposal through revision. Cross fingers it gets signed off!	Make formal contact with Samaritans re research	Identify charities for research. If possible, start contact	Engage in any CPD I can access
	May – July	Preliminary investigation into background topics for introduction and draft document	Exploring key themes in the literature and starting draft review	Make contact with potential charities	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	August - September	Develop literature review	Develop discussions with charities	Clarify process for working with charities	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	October-December	Ongoing work on literature review	Finalise charities for research	Draft plan for primary research	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2019	January – June	Ongoing work on reading key themes, the literature review draft and wider reading	Investigate research methodology and processes with a view to designing research tools	Keep research organisation(s) “warm” with regular contact	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access

	July-December	Ongoing work on reading key themes, the literature review draft and wider reading	Discuss research approach and timings with research organisations	Initial design of research tools and pilot	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2020	January – June	Keep up with some reading of current issues to support primary research	Review research tools following pilot	Firm up research timings with organisations and start primary research	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	July-December	Keep up with some reading of current issues to support primary research	Continue with carrying out and recording of primary research	Initial analysis of early data to check all on course	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2021	January - December	Keep up with some reading of current issues	Continue with carrying out and recording of primary research	Regular checks of data and analysis to ensure all on course	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2022	January - September	Keep up with some reading of current issues	Complete carrying out and recording of primary research		Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	October-December	Keep up with some reading of current issues	Analysis of data	Writing up of analysis	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2023	January-June	Complete writing up of methodology chapter	Finalise analysis and draft findings	Review literature chapter – what needs to be added	Regular meetings with supervisor(s); submit drafts	Engage in any CPD I can access

				to/amended in the chapter	when appropriate	
	July-December	Finalise literature chapter	Finalise findings	Identify sections in conclusion and write up	Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2024	January-April	Final review and writing up	Start corrections		Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	May-August	Corrections made and completed	Submit final thesis by 31 st August		Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
	September-December	Have completed viva and been awarded PhD by 31 st December			Regular meetings with supervisor(s); submit drafts when appropriate	Engage in any CPD I can access
2025	February	Celebrate 60th birthday as a Doctor!				

Appendix C – Calling Request for Research

Can you help with some research?

My name is Nicky Adams and I am working towards gaining my PhD at the University of Wolverhampton. My research is investigating how we develop leadership and management skills in volunteers who manage other volunteers.

The research involves interviewing a small number of volunteers from a number of organisations, broadly equating to “middle management” equivalent i.e. with responsibility for leading and managing a group of other volunteers.

If you wish to be involved please contact me at [email address redacted] and I will provide you with additional information about the research and the process as well as a consent form which you will need to sign. This will be followed by an interview which will take about 90 minutes and will be recorded for transcription afterwards. You will be asked about your experiences of leadership and management within your voluntary role, the kind of learning and training provided to support you in this role and how effective this has been for you. Your participation will remain confidential and all data will be anonymised. You can withdraw from the research at any time should you wish to.

If you are interested in helping me with my research, or finding out more, please get in touch at the above email address.

Should you wish to speak to my Director of Studies, you can contact XXXX at XXX

Appendix D – Consent and Final Information

Research Information and Consent

Thank you for agreeing to take part in this research project. My name is Nicky Adams and I am working towards gaining my PhD at the University of Wolverhampton. My PhD research is investigating how we develop leadership and management skills in volunteers who manage other volunteers. This interest is driven by my own experience as a Samaritans volunteer where I have held a range of leadership and management positions, and of being led and managed. I am particularly interested in organisations where volunteers are responsible for the delivery of a service which requires a range of often specialist skills. Further detail of the research can be found below.

The interview will take about 60 minutes and will be recorded for transcription afterwards. All copies of the interviews, along with your contact details, will be securely stored. All information will be anonymised within the research and details kept confidential. When the data is no longer needed it will be destroyed. Recordings and/or transcripts will be checked with you to ensure accuracy and if at any time you wish to withdraw all or part of your contribution to the research then you will be able to do so by emailing me on [email address redacted] up to 6 months after you receive a copy of your interview transcript.

A consent form is also provided for you to complete; this is the link for the consent form

<https://forms.office.com/Pages/ResponsePage.aspx?id=y7lg5ikBu0Se3aqm6QV1FANtFbiOjktKkAjQRtnXHVZUODIDSINTRjdVTFA3VII1TkFQWVdDSIU5MS4u> .

Should you wish to speak to my Director of Studies, you can contact XXXX at XXX@wlv.ac.uk

Further information

The interviews are being carried out with volunteers in leadership/management roles within the research organisations, broadly equivalent to “middle management” i.e. with responsibility for leading and managing a group of others.

There are 9 open questions in total, broadly divided up to cover the following key areas: to help gain an understanding of what the terms leadership, management and leadership and management development mean in your organisation; what the role/s look like from your perspective; your view of how well you are equipped to do the role; what could be changed to support you more in your leadership/management.

Thank you.

Nicky Adams

Appendix E – Participant Consent Form

PhD Research: Developing leadership & management skills in volunteer volunteer managers

Researcher's contact details: Nicky Adams

Email: [email address redacted]

Title of research project: How we develop leadership and management skills in volunteer volunteer managers (volunteers who lead and manage other volunteers)

Dear Participant

Thank you for considering participating in my research project.

Participation in the research is entirely voluntary and you are free to withdraw at any point.

If you decide to withdraw you may request that the information you have supplied will not be used in the project.

1. My research project aims to investigate the how volunteers acquire and develop leadership and management skills when in roles that require them to lead and manage other volunteers. I am particularly interested in organisations where volunteers are responsible for the delivery of a service which requires a range of often specialist skills.

The research consists of an interview lasting about 90 minutes and will be recorded for transcription afterwards. There may be a follow up conversation if required. All audio and/or written copies of interviews and conversations, along with your contact details, will be securely stored. All information will be anonymised within the research and details kept confidential. When the data is no longer needed it will be destroyed. Recordings and/or transcripts will be checked with you to ensure accuracy and if at any time you wish to withdraw all or part of your contribution to the research then you will be able to do so by emailing me on [email address redacted] [email address redacted] up to 6 months after you receive a copy of your interview transcript.

2. The information provided by you will be used for the following purpose only.

- to identify views regarding volunteer leadership and management roles, tasks and the learning and development provided to support this
- to be published as part of the PhD
- potentially to provide journal articles relating to this area
- potentially providing a basis for further research into the topic

3. The information that you supply will be:

a. Totally confidential. We will not record your name against anything that you have said. In any published articles or presentations, we will not include any information that would make it possible to identify you as a participant.

b. Accessible with your permission to: (e.g. research supervisor, other members of the research team).

7/30/2021

4. The information that you supply will be stored securely and retained for 3 years following the completion of the PhD.

If you have any questions or would like to know more about the study please do not hesitate to contact me.

Should you wish to speak to my Director of Studies, you can contact XXXX at xxx

If you have any queries, concerns or believe that your Personal Data is being handled in a manner which is contrary to statutory requirements, you may wish to contact the University of Wolverhampton's Data Protection Officer via dataprotection@wlv.ac.uk (mailto:dataprotection@wlv.ac.uk) or complain to the ICO via www.ico.org.uk (http://www.ico.org.uk)

Please enter your name and organisation so that I can ensure consent has been received from all participants.

Name:

Organisation:

Date:

CONSENT FORM

Please tick YES or NO for the following statements:

I agree to participate for the purposes of the research (interview and a possible follow up conversation) mentioned above.

2.

YES

NO

3. I agree to the interview being recorded.

YES

NO

I acknowledge that the purposes of the above project, the nature of my participation and the uses to which the resulting data will be put have been explained to me (see information above).

4.

YES

NO

I understand that my participation in this project is voluntary and that I have the right to decline to answer any specific question and I am free to terminate my participation at any time.

5.

YES

NO

I acknowledge that I have been given an opportunity to ask questions and that any questions that I may have asked have been answered to my satisfaction.

6.

YES

NO

I understand that my name will not be used or cited, or my identity otherwise disclosed

7.

YES

NO

Appendix F – Example Email Re Research

PhD Research



Adams, Nicky

To [redacted]



Thu 22/04/2021 16:03

Hi [redacted]

Thank you so much for agreeing to take part in my PhD research and be interviewed. The interview will take approximately 90 minutes and will be recorded on MS Teams.

Before we meet, you will need to complete the consent form which can be accessed here <https://forms.office.com/Pages/ResponsePage.aspx?id=y7Jg5ikBu0Se3aqm6QV1FAntFbiOjktKkAjQRtnXHVZUODIDSINTRjdVTF3Vli1tkFQWVdDSIU5MS4u>

I anticipate starting the interviews in May, so in order to plan the interview, could you please let me have an idea of the time of day which suits you – weekday/week-end, daytime/evening – and any specific times which are not suitable and I will then send some dates and times which might be suitable.

If you have any questions, please let me know.

I look forward to hearing from you.

Regards

Nicky

Nicky Adams PGCE, MSc, MCMI, SFHEA, FCIPD
Senior Lecturer HR & Leadership – Course Leader, Part-Time PG HRM and HRDOC CIPD Programmes
Room MN206
University of Wolverhampton Business School, Faculty of Arts, Business & Social Sciences
MN Building, Nursery Street, Wolverhampton WV1 1AD

E: [redacted]

Currently working remotely

Want to see me? Details of module drop in sessions are posted on Canvas. This Semester individual tutorials are available 11-12 on Mondays and 9-10am on Thursdays in teaching time only and done on Teams.

Appendix G – Interview Questions

Consent form link:

<https://forms.office.com/Pages/ResponsePage.aspx?id=y7lg5ikBu0Se3aqm6QV1FANtFbiOjktKkAjQRtnXHVZUNDVTVDBXUE9QU1c5SUtGQjhFWDZKVTg2Si4u>

Interview schedule

Ensure interviewees have read and understood consent documentation and remind them of option to withdraw at any time.

Name:

Organisation:

Role title: ensure that you have a role description for the roles so that you know what level of LM they carry out and check out the accuracy. Or ask the following.

What the role entails: Who do you have leadership/management responsibility for? How many? What level are the volunteers below/above you? How many do you have responsibility for? What role do they do?

Do you also carry out your original volunteering role alongside your leadership/management tasks/role?

Time as a volunteer with this organisation:

Time in this role (and any previous similar role if appropriate):

Semi structured interview Questions (bullets indicate prompts)

The questions are broadly divided up to cover the following key areas: to help me gain an understanding of how the terms leadership, management and leadership and management development are understood in your organisation; what the role/s look like from your perspective; your view of how well you are equipped to do the role; what could be changed to support you more in your LM role.

Q1

In your organisation, are the terms “Leadership” and “Management” used interchangeably or to mean the same thing – is this consistently used at all levels and does what actually happens reflect this?

- What documentation or evidence do you have outlining expectations of an LM role? Role descriptions etc

Q2

How do you feel about your role as a LM at your level in your organisation?

Q3

Briefly, what are the expectations of your role as LM? How does this experience as a volunteer LM in this organisation compare to any previous experience of LM as a volunteer or paid staff (similar or different level)

- What is expected of you/the role
- What level of responsibility goes with the role?
- Understanding of relationship between staff and volunteer in relation to LM
- Roles and responsibilities of staff and role of volunteers in LM tasks
- If there are any differences, what causes these?
- Discuss emotional labour – is there a difference?

Q4

Where does your experience and learning/development in relation to LM come from?

- Brought with you from work / some other role (paid or voluntary) / qualification / previous LMD / acquired through experience?
- At what level compared to this role e.g. this is a higher/lower LM role than in other setting/s
- If you have external experience, what impact has that had on your voluntary LM role in this organisation?
- How transferable do you find any previous employment experience?

Q5

Thinking about volunteer LM roles available in your organisation, how appropriate and effective is the process to the appointment being made?

- Open or closed process (application and interview? Tap on the shoulder? Last person standing?)
- Opportunities for personal growth / taking a step back / succession planning and support for these

Q6

When you achieved your LM role, how did you know what skills, activities and behaviours were expected of you, and what LMD or other support was provided to develop any skills you needed?

- What LM behaviours/skills are required/expected from volunteers, how are these identified? Role description, verbal instruction?
- Any kind of LNA? Individual or assumed you need it, or did you self identify?
- What LMD have you been offered? E.g. F2f, online, C&M, blended?
- Formal? Informal? Is it mandatory or optional at your level/role?
- What other support is provided (guidance from someone more senior, a staff member; buddy system, coaching, mentoring)?
- When is it delivered in relation to your need in your LM role?

Q7

How well equipped/skilled do you feel now to do your LM role – specifically any of the ‘soft’ people management skills required through the volunteer life cycle i.e. recruitment and selection activities; growth and development conversations (for succession planning); leading through change; stepping back or exiting the organisation.

- What contributes to this belief, how it is evidenced
- How well did any LMD delivery and content match your need for LMD?
- What support is offered to you following the LMD intervention to help you apply what you have learned?
- What evaluation, if any has been carried out?

Q8

What changes to LMD provision do you think would help you be more effective in your current LM role? If you are looking to move into a more senior volunteering LM role, what provision would help you do this?

- Gaps in provision
- Does it match – cultural requirements; current needs; diverse/inclusive
- Time required, expectation
- What other LMD is there for roles you may be interested in?

Q9

What else would you like to share with me which might be useful or relevant?

(note from pilots – discussed motivation for training, which is different from work and is related to wanting to be better at what you do. It may also be related to wanting to progress, or not.)

Appendix H – Draft Conclusions and Recommendations (Table)

Conclusions and Recommendations

What are we concluding? What do we need to think about here – what we know, what we have learnt? What supports what is already known and what adds to or brings new knowledge?

Theme	Conclusion	Recommendation
A - Make a theme of any docs relating to role	Patchy use of role descriptions of any kind	Identify what you want the role to be and write it down. Can help attraction and retention and better quality VVM (Nesbit et al, 2016; Einolf 2018)
B - Organisational and Individual Understanding of Leadership and Management	<p>Vols see leadership and management as different and necessary and broadly agree with lit definitions.</p> <p>Vols view of how orgs viewed the terms was less clear. Lack of clear comms on whether roles were L or M and from this a lack of clarity within the org itself. Potentially also a contradiction between the desire of L and the reality of role needing to be M. Size is a factor – large more likely to be/think they are being clear; small little or no distinction.</p> <p>This lack of clarity makes it hard to know if roles are supposed to be just L, just M or a mix, and if so in what proportion.</p>	<p>Orgs need to be clear about how they define these terms when identifying roles for VVMs. Nesbit et al 2016 see above.</p> <p>Also need to identify if roles are L or M or a mix – can't do this unless you know what the role is! Nesbit et al 2016 note possible confusion of roles so would address this. All said roles are both but orgs/docs not reflecting this.</p> <p>Need to find a way of communicating this to ensure that anyone interested would know what they were signing up for. Could help address issues related to attracting, retaining, nurturing and developing existing and new Ivanovska Hadjievaska, Johansson and Altermark (2023)</p> <p>Participants wanted clarity and felt it was not there.</p>
C – Views and feelings about the role	Challenging but worthwhile. Challenging because of vols but also skills needed.	Clarity of role expectation and appropriate opportunity to identify skills needed/existing and how to fix gaps.

		<p>A role using skills well increases retention and satisfaction (Einolf, 2018; Mumbi and Obembe, 2022)</p> <p>??need to link to EL as well? they seem ok with it but did they know about it before? Didn't ask so don't know. EL sources here...</p>
D – What the role is all about	<p>Understanding of what was required, but implicit was that many learned of these in the role – lack of clarity about the role as not documented effectively or accurately.</p> <p>Needs L and M, in contrast with lit which focuses on one or the other.</p>	<p>Be clear about what the role needs. Document it. Acknowledge that at this level it is often L and M, not either/or.</p> <p>Is it task or relation related activities? Relational approach is more common with VMs (Jäger, Kreutzer and Beyes, 2009; Posner, 2015; Nesbit et al, 2016; Ertas, 2018).</p> <p>This sentence is key here Jäger, Kreutzer and Beyes (2009) noted there was little research in volunteer leadership compared to volunteer management, this has changed in the intervening years with a focus on shared leadership but how management activities sit alongside leadership activities, as demonstrated in this research, is not really explored</p>
E - Emotional Labour in VVM	<p>Strong agreement more EL needed managing vols. Motivation, engagement need more effort, harder on you as a VVM. Aligns to shared leadership ideals. If there is a risk this leads to higher burnout in paid VMs, can assume may be worse with VVMs but no research.</p> <p>It is different from paid VMs managing vols.</p>	<p>Need to acknowledge this, communicate about it and ensure we train/provide support.</p> <p>Has potential impact on retention and possibly succession as high levels of EL take a toll such as Green and Ward (2016, p.36) say managing volunteers can be “difficult, uncomfortable and trying”</p> <p>Also should consider how we recruit for this (although outside the remit of this research).</p>
Theme F – Sources of Experience and	<p>Most bring their experience with them, often from paid work. Too</p>	<p>Need to identify if the attitudes and experience they bring are suitable</p>

<p>Learning of Wider Leadership and Management</p>	<p>many, nearly 50%, are accidental managers. Skills are transferable but where trained in business, application needs to adapt to sector.</p> <p>Training in for profit sector or 3rd sector will have a specific focus that may not be appropriate, also not likely to be shared/distributed. Could be damaging, but lack of data means we don't know (my view would be yes definitely). Need to VVMs to be culturally aware both re volunteering but also to the organisation specifics.</p>	<p>for the VVM role. Do they understand the differences? Have sufficient experience of the specific volunteering environment to adapt/know what they need to do. See source below also relevant here and Given that information about their volunteers' skills is inconsistent across the sector (Bentley, 2024, Reynolds, 2024; Vizor, 2024), charities may be making assumptions about existing skill levels and decisions about what LMD is needed that could be inaccurate at best and damaging at worst.</p> <p>Also how this fits in to this section Of those participants who had developed their LM skills through their workplace, only P14 had developed these skills in the voluntary sector; the others had developed them in either for-profit organisations or the armed services through a mix of training and doing the role. The literature acknowledges that different organisation types e.g. large organisations, SMEs, public and private sector approach LMD differently (Perkins, 2016; Buchanan and Huczynski, 2019; Barends et al, 2023) but ultimately the discourse and provision is predominantly based on developing leaders to function effectively in an environment where there is a clear positional power-relationship driven by the employment contract and very often in a profit-focused domain (Iszatt-White and Saunders, 2017; Bratton, 2023b). This contrasts significantly with the view that relational approaches such as shared, distributed or servant</p>
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		<p>leadership are most effective when leading volunteers (Freund, 2017; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022).</p> <p>If they are accidental at work and we don't provide the right development they are (even more) accidental for us! If such managers can have a significant negative impact on staff turnover (CMI, 2023) then potentially they could have the same impact on volunteer turnover, particularly at a middle management equivalent level (Bosley and Gifford, 2023).</p> <p>This means LNA and one that is clearly linked to a role description or something that outlines the needs.</p> <p>If this – and it should be – related to shared/distributed - then may lead to training needs.</p> <p>VVMs need a level of volunteering and org cultural awareness, so should form part of recruitment if possible. See if large cut and paste above fits better here.</p>
<p>Theme G – Appointment to Role and Expectations</p>	<p>Lack of documentation; lack of consistency; not a robust process in parts but also some good practice although in minority. This can allow people to grow into a role so has some benefits. Potential lack of consistent LM in org. Progression and succession planning inconsistent; exacerbates the succession planning and capacity issues. Impact on diversity in VVMs.</p> <p>Need for wider understanding of need for leadership roles and</p>	<p>Need some kind of documentation! But not overly professional. Lack of such documentation is not unusual (Jaeger, Kreutzer and Beyes, 2009). Recruitment is more effective when volunteers feel the tasks match their motives (Einolf, 2018) and role descriptions ensure a better volunteer experience (Nesbit et al, 2016), so this would also apply to VVMs.</p> <p>Would allow appointment of experienced and grow your own. Will support development of consistent approach to L&M and</p>

	<p>vols to do them. Balance of docs vs. Professionalisation.</p>	<p>support progression and succession planning. Supporting capacity. Is this relevant here VMs often bring business-focused LM learning to their role but also that the leadership style seen in these non-profit organisations is more likely to reflect styles prevalent in private sector for-profit businesses (Freund, 2017), rather than the more relational approaches considered effective and needed within the voluntary sector (Posner, 2015; Jaeger, Kreutzer and Beyes, 2009; Terry, Rees and Jacklin-Jarvis, 2020; Mumbi and Obembe, 2022).</p> <p>And this Einolf (2018) comments that VVMs are less likely to use formal HR practices than paid VMs, but whilst middle-management staff are most likely to reflect the leadership style they see in the organisation, VVMs who are not provided with appropriate LMD may be more likely to use the approaches they have learnt in their own LM experiences, making consistent approaches to leadership and management across the organisation impossible to achieve and potentially leaving them unaware of the need to manage volunteers differently from paid staff (Greene and Ward, 2016).</p> <p>Extra important as if we agree that in a paid role, it is unrealistic to expect one person to have these attributes (Watt Boak and Gold 2023) , it is even less feasible to have this expectation for a VVM as this is voluntary and not their paid job (need to explain this better). Additionally they can have so many competencies within the framework</p>
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		<p>that one person would be unlikely to achieve this; this issue in particular is one which shared/distributed leadership is ideally placed to address (Kapoor, Noida and Agnihotri, 2015; Goksoy, 2016). This connection is not made by Watt, Boak and Gold (2023) and this could be connected to the view that leadership theory development and by association, LMD, is linked to competitive and economic drivers Bratton (2023b).</p> <p>Need to make roles clear, attractive to vols and help them understand the need for them. This is mentioned in lots of places</p>
Theme H – What is involved in the role	<p>Lack of documentation again but also expectation to bring skills not have them developed (Alizadeh et al 2021). Learning from being part of a team and observing good and bad.</p> <p>Negative impact on diversity.</p>	<p>Clarity of needs – back to role description.</p> <p>Have a clear plan of what development we can provide and where we can't how we can signpost to it. Building on previous experience and encouraging progression as we do in work.</p> <p>Making roles more feasible should support diversity but we also need to do more.</p>
Theme I - What support did you have?	<p>Expectation of bringing skills. No LNA done. Only a 3rd offered/received training but most found it inadequate in some way. Mentoring offered to half but nearly half of these had poor match. Needs to be right and carefully done. Most used informal approaches, but often self-identified which relies on their self-awareness and honesty. Balance of formal/informal best – as suggested in literature. Risks of reliance on self id given lack of</p>	<p>Need to know what the role is and what skills.</p> <p>Need to do some kind of good LNA.</p> <p>L&D solutions need to be timely and appropriate, not “sheep dip” or off the shelf. Need to help build informal networks.</p> <p>Need LNA to ensure that self identified is accurate and not the main choice. Some approach to formalised LNA is important in LMD (Gill, 2011; Patterson et al,</p>

	<p>full role information. All bar 1 felt it patchy and lacking.</p>	<p>2017; Beevers, Rea and Hayden, 2020; Choi and Park, 2024) to ensure that the individual's needs are correctly identified and then met, as well as to allow for meaningful evaluation of the effectiveness of the support offered</p> <p>Balance of formal and informal.</p> <p>evidence of the use of informal and unplanned activities as part of LMD (Watt, Boak and Gold (2023) and to support a more formal approach (Muendel and Schugurensky, 2008; Henriksen and Borgesen, 2016; Page-Tickell, 2017).</p> <p>not explicitly outlined as informal approaches in the literature, they do support the importance of informal learning within volunteering (Muendel and Schugurensky, 2008; Fullwood and Rowley, 2021), and particularly within LMD for VVMs (Palanski, Hammond and Khazanchi, 2022).</p>
<p>Theme J - How well equipped/skilled do you feel now?</p>	<p>Everyone felt well equipped now. In spite of everything???</p> <p>No consistent evaluation but without LNA and structured approach, won't be helpful. No informal follow up either. Only 10 of 16 had an LMD and only 3 of those spoke of evaluation, only said all of it was done.</p> <p>Larger orgs more likely to provide LMD, smaller focus on mandatory.</p>	<p>More by luck than judgement!!!</p> <p>Need to do LNA and start with what we want to develop and evaluate and at what level. Probably needs to be relational of the VVMs specifically included or focused on soft skills such as communication and relationship building with volunteers in their responses, reflecting the importance of these for VVMs, demonstrating the importance of these (Goksoy, 2016; Benmira and Agboola, 2021; Laasch, 2021) and supporting a relational leadership approach (Pielstick, 2000; Posner, 2015; Nesbit <i>et al</i>, 2016).</p>

		<p>Even if not formal, need to check in with VVMs on their progress. here was no follow up after any learning/training took place for the majority of participants, with only P7, P9 and P16 identifying follow up such as regular feedback and one to ones taking place.</p> <p>Meaningful evaluation at any level of Kirkpatrick's model does not routinely take place in any of the organisations.</p> <p>Needs to be more than mandatory training as well please!</p>
<p>Theme K - What Leadership and Management Development provision would help VVMs be more effective in their role?</p>	<p>Handover</p> <p>LNA/skills audit</p> <p>Personalised learning</p> <p>Skills application in vol sector</p> <p>Right content for individual and context/org - general management and interpersonal skills</p> <p>Timeliness also time to reflect and apply, range of ongoing options.</p> <p>Formal structured mentoring</p> <p>Succession planning by using knowledge building.</p> <p>Diversity is an issue, lack of diversity exacerbated by lack of succession planning. Changing attitudes to volunteering.</p>	<p>These are really the actual recommendations. Need to have a formalised and useful handover process.</p> <p>LNA and provision of personalised learning. Also will help with different levels of LM experience for incoming VVMs. This supports the need for a robust and timely LNA (Gill, 2011; Patterson et al, 2017; Beevers, Rea and Hayden, 2020; Choi and Park, 2024).</p> <p>Need to ensure that content and context are org specific as well as personalised, VMs are trained and supported to develop the necessary skills and also the view that relational skills are less transferable from training to workplace when compared to general management skills (Barends <i>et al</i>, 2023) and an individually tailored solution will be more effective.</p> <p>This list demonstrates how the role is a mix of leadership and management tasks (Rochester, Paine and Howlett, 2010; Bezboruah, 2011) who are often involved in a combination of</p>

		<p>leadership and management tasks. To be effective, LMD should include general management and interpersonal skills (Bosley and Gifford, 2023), and for volunteer managers, the ability to manage higher levels of emotional content is significantly more important (Greene and Ward, 2016).</p> <p>Timeliness for the role and allowing time to do this. Allowing time to undertake the learning, using different approaches, delivering it over time to embed learning and providing time and space to practice in a safe environment during and after the event all enhance the effectiveness (Bosley and Gifford, 2023). Ensuring LMD is systematically integrated into organisational processes is also critical (Barends <i>et al</i>, 2023).</p> <p>Mentoring needs to be fit for purpose so decide if you want it as optional or mandatory and structure accordingly (inc training!). There is much made of the suitability of mentoring as a support mechanism in LMD (Coetzer <i>et al</i>, 2011; Gill, 2011; Perkins, 2016; Watt, Boak and Gold, 2023) with it being helpful for both leaders and leadership teams (Connor and Pokora, 2017; Garvey, Stokes and Megginson, 2018) although there is little evidence here that it has been used to support wider leadership team members since this question was not posed. Because mentoring is most likely to take place in situations related directly to the VVMs role, it also fits with Iszatt-White and Saunders' (2017)</p>
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		<p>view that it is more likely to be effective than off-site LMD.</p> <p>Mentoring is a principal part of LMD not just in business contexts, as evidenced by Carroll (2015), Connor and Pokora (2017), Garvey, Stokes and Megginson (2018) and Watt, Boak and Gold (2023) but also by Gill (2011) and Fullwood and Rowley (2021) in voluntary settings. P1 felt that although honest conversations about the commitment to a VVM role might deter some, it would ensure that people knew what to expect of the role and a mentoring relationship would provide a space for such discussions.</p> <p>Think about how current leadership structure processes and training support succession planning and how it could be done better and to include a more diverse range of leaders.</p> <p>followership and its associated skills were important. The importance of followership (Laasch, 2021) and developing leadership skills in future leaders (Freund, 2017; Alizadeh et al, 2021)</p> <p>We say in the sector that we want more diversity, particularly in leadership roles (Alizedah et al, 2021) but what we do seems to perpetuate what we already do and who we currently are.</p> <p>Consider impact of changing attitudes to volunteering The attitude to and nature of volunteering has also changed according to P5, which is reflected in a number of reports and articles (Kanemura, Chan and Farrow,</p>
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		<p>2022; May, 2023; Rich and Lapshynov, 2023; Oliver, 2024).</p> <p>– how to make VVM roles more flexible – and shared leadership seems the answer!</p> <p>How do we educate and train those in lower VVM roles e.g. deputy directors within Sams.</p>
		<p>What is accepted as good practice in L&D and LMD is not taking place in many organisations but is clearly identified by these participants as being necessary and beneficial. Identifying what diversity levels are within leadership roles in the sector, and potentially what specific diversity goals organisations have in relation to this, is another area where further research would benefit the sector.</p>

Other areas to research – EL in volunteering and particularly in volunteer leadership and management.

Motivation into why you would choose to be a VVM

Recruitment for VVM roles

Appendix I – Lead Volunteer L&D Checklist

Lead Volunteer L&D Checklist

This checklist is designed to help you find and keep the right volunteers for leadership and management volunteering roles in your organisation. It should provide you with an idea of what you are already doing to support volunteering in these roles and suggest other actions to improve this. If you are a small organisation, some of the questions may be less relevant – if two of you are your organisation’s senior people and you want to bring a third person onto the team, it should be easy to agree on what you want the role to look like. If you are a large organisation with an executive staff team, a trustee board, employees and volunteers, you may find it more challenging.

Understanding of Leadership and Management

Think about what your organisation means when they use the terms management and leadership.

- What do these terms mean in your organisation?
- Who uses these terms – senior people, other staff, volunteers?
- Is this usage and understanding consistent across the organisation? If not, consider how you could improve this. Think about any similarities and differences in how the terms are used, or whether they are used interchangeably.
- How will you communicate this with the wider organisation?
- What does the Lead Volunteer understand by these terms? If they are different from the organisational understanding, consider how you can help the LV understand the organisation’s view.
- What sort of leadership style do you want your Lead Volunteer(s) to apply? Shared leadership, where leadership activities are undertaken by different people with different skills, or who want to develop leadership skills, is the most effective leadership in voluntary organisations. You can find more information about this here [LINK](#)

Role Documentation

You need to be clear about the role, what it is and what its limitations are.

- Can you explain what the role is? Think about documenting the tasks and expectations associated with the role. This could be a detailed role description or just a few lines. It should help the current and future lead volunteers know what is involved in the role.
- Be clear about who your LV reports to and can get support from

- How does your LV's performance support the achievement of the organisational goals and objectives? Make sure your LV is clear about these links.
- What will you do if the LV is not able to do the role to the agreed standard? Think about any processes you might need to support the lead volunteer and the organisation here.

Identifying and Developing the Right Skills and Knowledge

Using the information about what the role is, think about the skills and knowledge needed to do the LV role. Having a list of these is helpful, as is identifying which are tasks and which are behaviours. Whilst you might want to have someone with all of the skills, this limits the people who might apply so think about which skills/knowledge they must already have and which you can support them in developing.

- What sort of development and/or support does your LV need?
- What can you and the wider organisation provide? Remember this doesn't have to be formal training but can be a buddy or mentor; documentation; conversations with different people.
- What needs to be sourced outside the organisation? Can you link up with other voluntary organisations or charities with similar needs, or in your local area? Think about the connections you may have through organisations such as Association of Volunteer Managers, ACEVO or local Council for Voluntary Service (CVS) and how these could be helpful.
- How will you ensure that the support/development you are providing meets the LV's needs? Regular chats about how the LV is doing, how they are applying anything they have learned, what other support they need are a good start. You can document this if you want, or consider more formal evaluation if that is appropriate. The information about the role and the LV's needs will help direct these processes.

Managing Volunteers And Yourself

Working with volunteers is not the same as working with paid staff. Volunteers are motivated by their values and commitment to what the organisation does, not by their pay. This requires additional emotional effort and the LV may need to develop new or existing skills to do this.

- Is your LV aware of the differences in managing volunteers?
- What support do you have in place for your LV if they need to help with or space to talk about these challenges?
- Do you understand what motivates your potential VVM to take on this role?

- What do they want out of it?
- What can you/the organisation do to help them with this? What can they do to help themselves with this?

Need some ideas about how to support/develop your LV?

Here are some suggestions made by volunteers with leadership/management responsibility for other volunteers about what is helpful.

- Identify where the gaps are in the LVs knowledge with a conversation
- Provide support/development at the right time for the LV, including time to reflect on and apply what has been learnt
- Good handovers make a difference
- Learning needs to be specific to the role in the organisation
- Remember to provide support for both the management (this is how to get the fire extinguishers checked) and the leadership (this is how we support volunteers through changes) activities
- A mentor, carefully selected and supported by some structure and expectations (including what to do if the relationship isn't working) can be really useful
- Formal training can be helpful but local ongoing timely support from within the organisation is better