

# Volunteer and Visitor Interaction in the UK Heritage Sector: motives and benefits

Kirsten Janet Holmes

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## **Abstract**

This thesis examines the motivation of volunteers through a study of front-of-house volunteers in museums and heritage visitor attractions in the UK. The heritage sector proved an appropriate population for the study sample due to the wide involvement of volunteers.

A review of the literature found that research on volunteering had developed along two paradigms: the economic model, which views volunteers as unpaid workers; and the leisure model, which considers volunteering as a leisure activity. Within the heritage sector, the economic model was found to dominate.

The study adopted a case study methodology in order to investigate the contexts within which volunteers are motivated. However, a major consideration of the research was to maximise the external validity of the study and 222 volunteers were interviewed across ten case studies.

The findings of this thesis show that volunteers consider their activity to be a leisure activity, although this does not conflict with the introduction of professional volunteer management procedures. Volunteer motivation was found to change with length of service. Initially volunteers were motivated by intrinsic motives, in particular subject interest, while extrinsic motives, particularly social opportunities motivated them to continue to volunteer. An Interaction Model of Volunteer Motivation was proposed as a means of understanding and identifying the role of social opportunities in motivating volunteers. In addition, volunteers within the heritage sector are typically older, retired individuals and the act of retirement was found to have a significant impact on their decision to volunteer.

The significance volunteers attributed to their encounters with visitors reinforced the importance of social interaction in motivating front-of-house volunteers. Three models of encounters were proposed: the service encounter, the host-guest encounter and peer tutoring. The volunteer-visitor encounter was found to be a hybrid of the three models,

with volunteers gaining enjoyable social interaction and visitors learning from the encounter.

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## **Chapter 1: Introduction**

### **1.1 Background**

This thesis examines what motivates volunteers who work in front-of-house, service roles within museums and heritage visitor attractions.

The voluntary sector and volunteering are notoriously difficult to define due to the different methodologies used by different studies and a lack of any one agreed definition of what a volunteer is (Davis Smith, 1996; Marshall, 1996; Lynn, 1997). This has resulted in volunteering being an under-researched field (Ellis, 1985; Fischer & Schaffer, 1993; Pearce, 1993; Smith, 1999). Previous research within the sector has focused on quantitative surveys of voluntary activity, seeking to provide an overview of the voluntary sector and to make generalisations about volunteering (Lynn & Davis Smith, 1992; Goddard, 1994; Davis Smith, 1998). In particular, little is really known or understood about volunteer motivation (Lapham, 1988; Pearce, 1993; McCudden, 2000; Chappell & Prince, 1997; Deery, Jago & Shaw, 1997), which is an important gap in the research given that:

“Understanding motivation is relevant to virtually all aspects of volunteer programs.” (Fischer & Schaffer, 1993: 43).

The empirical studies mentioned above tend to produce lists of why people chose to volunteer, with little analysis. Researchers debate whether volunteers are altruistic (Schram, 1985; Pearce, 1993), while others contend that volunteering is in actual fact a leisure activity, albeit a serious leisure activity which demands considerable commitment and effort from the volunteer (Henderson, 1984; Stebbins, 1992; Parker, 1997a). Moreover, while there is a significant literature on volunteer management, this tends to be written from a practitioner perspective, and consists mainly of manuals designed to help the busy volunteer manager (for example: Wilson, 1976; Brown Fletcher, 1987; McCurley & Lynch, 1998).

The heritage sector particularly involves a large number of volunteers and it has long been acknowledged that volunteers form the backbone of many museums and heritage

attractions within the UK (Millar, 1991; Hall, 1995; Murch, 1999; Graham, 2000b; Resource, 2002). In 1998, it was estimated that the 1188 registered museums and galleries, which responded to the Museums and Galleries Commission's DOMUS survey, involved 25,206 volunteers. Compared to their 12,590 permanent staff and 2,775 part-time staff this meant that volunteers outnumbered full-time equivalent staff by nearly 2 to 1 (Creigh-Tyte & Thomas, 2001). This reinforces the findings from the Museums Workforce Survey in 1993, which estimated the number of volunteers involved in the museums sector to be between 25,000 and 30,000, approximately 50% of museum workers, with a considerable number of museums entirely dependent on their volunteers (Klemm and Wilson, 1993). Indeed, a recent survey found that 93% of museums and heritage attractions involve volunteers in some activities on a regular basis, that is at least once a week (BAFM, 1998) and an estimated further 38,900 volunteers work for the National Trust in England and Wales (Creigh-Tyte & Thomas, 2001).

However, research has identified the management of volunteers as presenting a challenge to museum and heritage managers, because many managers rely on volunteers and yet they are also unaware how to involve them effectively and do not understand their motivation (Kahn and Garden, 1993; Hall, 1995; Walter, 1995). More recently, Croft has stated in her report to Resource that:

“Volunteering is at a low ebb.” *and* “Little thought is given to what volunteers themselves get from the process...” (Croft, 2001)

Researchers have in the past maintained that the heritage sector stands out as an anomaly within the wider voluntary sector as volunteering has somehow developed differently within museums from other organisations (Millar, 1991; Smith, 1999). However, a comparison between the characteristics of heritage volunteers with volunteers generally shows that this is unconvincing. Museums and heritage attractions do tend to attract older, retired volunteers, even though this age group is traditionally less likely to volunteer (Millar, 1991; Resource, 2002). For example, a survey conducted across the heritage sector by the British Association of Friends of Museums in 1997 found that 66% of volunteer respondents were aged over 60 years (BAFM, 1998). However, the 1997 National Survey of Volunteering found there had been an

increase in the proportion of older people volunteering in all organisations since 1991 (Davis Smith, 1998). Researchers have also consistently commented on the high socio-economic status of museum and heritage volunteers and the lack of representation from ethnic minority groups (Mattingly, 1984; Walter, 1996; Graham & Foley, 1998). However, volunteers in all sectors typically have a high level of education, which is linked to higher socio-economic status based on occupation and higher income (Schlegelmilch & Tynan, 1989; Fischer & Schaffer, 1993; Herzog & Morgan, 1993; Davis Smith, 1996).

Since the 1990s pressures experienced by the voluntary sector, such as an increasing need to provide a professional service, mean that there is a shortage of volunteers willing to make time commitments (Davis Smith, 1996; Nichols & King, 1998; Davis Smith, 1998; Nichols, Shibli & Taylor, 1998). Therefore it is likely that organisations seeking volunteers will look increasingly towards the growing population of retired people for their volunteers (Millar, 1991; Chambre, 1993; Bass, Caro & Chen, 1993; Foresight, 2000). Thus, the heritage sector with its large proportion of older and retired volunteers presents a suitable sector for a study of the volunteer experience, as the results will be of use to the voluntary sector at large.

Today, the UK heritage sector consists of a diverse grouping of attractions and organisations (Swarbrooke, 1995; Drummond, 2001). This includes c1800 registered (or museums working towards registration, the government-sponsored scheme for establishing standards within museums) and an estimated further 350 unregistered museums and art galleries, 874 privately owned historic houses and castles (including c500 members of the Historic Houses Association), c250 National Trust and c130 National Trust for Scotland properties, 409 English Heritage sites, c330 Historic Scotland and c130 CADW (the Welsh Commission for Historic Monuments) properties, listed and unlisted churches and cathedrals, historic libraries, archaeological sites, craft centres, and re-enactment groups. In England alone there are 17, 759 scheduled ancient monuments, 8,700 conservation areas, 1,300 registered parks and gardens, 43 historic wreck sites and 36 registered battlefields, and in December 1997 there were 451, 287 listed buildings of architectural or historic merit (Hanna, 1999b). The International Council of Museums (ICOM) definition for a museum serves as an appropriate guideline for identifying a heritage attraction and is given below in 1.3.

As the above summary shows, the heritage sector is equally diverse in ownership and funding. National museums and properties owned by English Heritage, CADW and Historic Scotland are directly funded from central government, while museums and heritage sites run by local authorities are also dependent on public funds. However, the majority of historic properties are managed by the independent sector, privately by individuals or by commercial organisations, such as the Tussauds Group which own Warwick Castle, as well as by independent charitable trusts, including the National Trust and National Trust for Scotland. The independent sector is where the majority of volunteers work (Carter, Hurst, Kerr, Taylor & Winsor, 1999).

Increasingly, volunteers within the heritage sector are being involved in front-of-house activities (Walter, 1995; BAFM, 1998) and are thus coming into regular contact with visitors. Museums and heritage organisations are facing an increasingly competitive market coupled with a demand, for publicly-funded organisations, to justify their existence, often in terms of visitor numbers. For museums and heritage organisations the repeat visitor market is crucial and the most common form of enticing visitors is through word-of-mouth recommendation (Davies, 1994). An analysis of 164 visitor surveys conducted at UK museums and galleries revealed that 36% of visitors found out about the attraction through word-of-mouth recommendation (Davies, 1994). As such the importance of the quality of service provided by front-of-house staff is explicit (Hobday, 1998; Drummond, 2001). Within the commercial world of tourism, service quality has been the subject of much research in an effort to find out what constitutes good quality, how customers assess good quality and how quality can be measured to increase customer loyalty (Swarbrooke, 1995; Chadee & Mattsson, 1996; Baker & Fesenmaier, 1997; Oh, 1999). Volunteers can provide a personal and enjoyable experience for visitors, which needs to be fostered and encouraged for the long-term benefit of the heritage sector. The importance of well-motivated front-of-house staff is well documented in the service sector (Czepiel, Solomon & Surprenant, 1985; Bitner, Booms & Tetreault, 1990; Gremler & Gwinner, 2000; Gremler, Gwinner & Brown, 2001). Since it is well documented that word-of-mouth recommendation is the most frequently cited means of marketing museums and heritage visitor attractions to new visitors (Davies, 1994), while repeat visitors are the key audience (Black, 2000), then poorly managed, unmotivated front-of-house volunteers are detrimental to either encouraging new audiences or repeat visitors.

Hobday (1998) notes that as museums increasingly need to compete with other leisure attractions there is a growing need to raise the esteem of front-of-house staff, whether paid or not. External pressures are leading to the adoption of what is termed a professional approach to volunteer management where volunteers are subject to the same procedures as paid staff. However, volunteers are not paid for their work and therefore it is probably even more important to understand their motives than those of employees (Moore, 1985).

Thus, volunteering in all sectors is an under-researched field (Davis Smith, 1996; Marshall, 1996; Lynn, 1997). Moreover, relatively little is known about volunteer motivation. This is in spite of the importance of volunteers in both sustaining organisations across the heritage sector (the DOMUS survey numbers volunteers as equivalent to full- and part-time staff and freelancers all combined within UK museums and galleries) and the growing involvement of volunteers in front-of-house activities, with a likely impact on the visitor experience. Therefore, the study of what motivates volunteers in front-of-house service roles within the heritage sector is a valid topic for research.

## **1.2 Research strategy**

Previous research on volunteer motivation has tended to be quantitative, focusing on lists of motives rather than attempting any analysis. This investigation adopts a qualitative approach and consists of a series of case studies, where volunteers involved in front-of-house activities were interviewed about their motivation. Ten case studies were chosen to represent the complexity of the heritage sector, as set out above, with consideration for the subject matter of the attraction, number of volunteers, governing body and geographical location.

The theoretical framework for this thesis (developed in Chapter Three) proposes that volunteers are either motivated by social interaction, or by pro-social motives (the term pro-social is similar to altruism, but suggests that the participant does gain some benefit from the activity (Pearce, 1993)). Three models for social encounters between front-of-house volunteers and visitors are proposed: the service encounter, the host-guest

encounter and peer tutoring. In order to examine these models, visitors were also interviewed.

### 1.3 Definitions

Volunteers are people who undertake voluntary activity, which is defined by the National Centre for Volunteering, an independent advisory and research body for the UK, as *any activity which involves spending time, unpaid, doing something which aims to benefit someone (individuals or groups), other than or in addition to close relatives, or to benefit the environment* (Lynn & Davis Smith, 1992; Davis Smith, 1998). Within the heritage sector volunteers undertake a wide range of activities from management through to cleaning. Moreover, many independent museums and heritage attractions are entirely run by volunteers or find their origins in local voluntary groups. A fuller description of the different ways in which volunteers can be involved in the heritage sector is given in Chapter Two.

The heritage sector is a nebulous concept, which many have tried to define with varied success. A heritage organisation can be described using the criteria set by the International Council of Museums (ICOM), that is:

*A non-profit making permanent institution in the service of society and of its development, and open to the public which acquires, conserves, researches, communicates and exhibits, for the purposes of study, education and enjoyment, material evidence of people and their environment.* (ICOM Statutes Article 2 – Definitions)

However, while the ICOM definition is presented as a basis for identifying a museum or heritage organisation there may be exceptions, such as company visitor centres, which seek to make profits. Consequently, for the purposes of this study, and for future research this definition has been broken down into classifications applying a function-based segmentation approach as presented in Chapter Four.



#### **1.4 Thesis structure**

A brief description of the remaining thesis chapters is given below:

Chapter Two – A review of five quantitative studies of volunteering within the heritage sector, which establishes the background for the thesis. These studies are compared with the 1997 National Survey of Volunteering to demonstrate the comparability of data from the heritage sector to other sectors involving volunteers.

Chapter Three – A review of the relevant literature and previous research on volunteer motivation. This chapter establishes the conceptual framework of the thesis.

Chapter Four – This chapter presents the research questions and a description of the methodological strategy for this thesis.

Chapter Five – A review of the methodology. The validity of the data and the limitations of this study are considered.

Chapter Six – This chapter presents an analysis of the management at each organisation, which establishes the context for each case study. A tool for assessing the level of professional volunteer management at an organisation is presented.

Chapter Seven – This chapter presents an analysis of the volunteers' motivation and, using the visitors' responses, considers the nature of the volunteer-visitor encounter.

Chapter Eight - This chapter discusses the results and proposes an interaction theory of volunteer motivation and a model for the volunteer-visitor encounter.

Chapter Nine – This chapter reviews the research problems and the methodology and presents the contribution of this thesis, the key findings of the research and their implications, the limitations of this study and makes recommendations for further research.

## **Chapter 2: Volunteering in the Heritage Sector**

### **2.1 Introduction**

Chapter one established that the heritage sector would form the focus of this study of volunteer motivation. This chapter sets out the importance of volunteers and their contribution to the UK heritage sector, and notes that, in particular, heritage volunteering is a retirement activity, which contrasts with volunteering in other sectors. Five surveys of volunteering are compared: Jenny Mattingly's 1984 survey of volunteering in museums and art galleries and an updated version of this survey conducted in 1998 (Holmes, 1999); the British Association of Friends of Museums survey of volunteering across the heritage sector (BAFM, 1998); a National Trust survey of volunteers and volunteer managers (Davis Smith & Chambers, 1997); and the 1997 National Survey of Volunteering (Davis Smith, 1998). These five studies reveal strikingly similar motivations on the part of volunteers, thereby confirming the heritage sector as an appropriate field for researching wider issues within the voluntary field. Where relevant these studies are further compared to a survey conducted for Resource, examining the involvement of volunteers across the cultural sector (Resource, 2002). However, this study did not consider volunteer motivation, so it is not considered in detail in this Chapter. This synthesis provides the framework for fieldwork within this thesis and contextualises the research both within the wider heritage and voluntary sectors.

### **2.2 Background**

The four heritage-specific surveys compared in this chapter demonstrate that volunteers are involved in museums at many levels, from management as trustees or at all-volunteer museums, to supporters as members of Friends' groups, who pay a subscription to a museum or art gallery in return for benefits such as reduced admission and a newsletter. The surveys discussed in this chapter focus almost exclusively on 'active volunteers', that is, people who come in and actively help out for no financial reward, on a regular basis, but are not involved in management functions.

In 1984 Mattingly undertook a survey of voluntary activity in UK museums and galleries (Mattingly, 1984), commissioned by the then Volunteer Centre UK (which

became the National Centre for Volunteering in 1996) and the Museums and Galleries Commission (MGC, which was amalgamated into Resource in 2000), who wished to establish facts and figures about the nature and extent of voluntary involvement in museums. This survey was designed to fill gaps in the information held by the MGC, who knew that volunteering was substantial within the sector, but were unable to give exact details. Mattingly's survey demonstrated the important role of volunteers within the sector, with 91% of her respondents involving volunteers and an average of 9.2 volunteers working in each museum.

Mattingly's survey was extensive and filled the information gap to the extent that it remains to this date a regularly quoted source of statistics on volunteering, despite being over 15 years old. The Museums Workforce Survey (Klemm & Wilson, 1993) does include volunteers, but is nowhere near as comprehensive; while the regularly updated National Surveys of Voluntary Activity (Lynn and Davis Smith, 1992; Davis Smith, 1998), though providing considerable information on voluntary activity, include museum volunteers within the wider categories 'hobbies/recreation/arts' and 'the environment', which makes it difficult to identify specific data pertaining to heritage volunteers.

The most recent surveys examining the role of volunteers within the heritage sector are the BAFM study (BAFM, 1998), exploring training provision for volunteers within the heritage sector, the National Trust Survey (Davis Smith & Chambers, 1997) and the Resource study (Resource, 2002), which compares volunteering in museums with libraries and archives. The BAFM sample was larger than Mattingly's, with 400 organisations compared to 140, and was chosen from heritage organisations in the widest sense including historic houses and cathedrals, whereas Mattingly's sample was gleaned from the 1982/3 Museums Association Yearbook. This is significant as Sightseeing in the UK shows that attractions, such as cathedrals and country houses, involve large numbers of volunteers (Hanna, 1998). Indeed 12% of respondents to the BAFM survey stated that they worked in a cathedral or church. However, the BAFM survey's response rate was only 41% for paid staff and 31% for volunteers, which is low compared to Mattingly's 71%. Yet the results of both surveys still bear similarities. Mattingly found that 91% of museums involved volunteers, while the BAFM survey found that 93% of their respondents involved volunteers on a regular basis, that is at

least once a week. Moreover, the BAFM survey focuses on the training of volunteers, which was just one feature of Mattingly's report. The National Trust Survey only questioned National Trust volunteers and paid staff. Although the response rates were good, 60% for the volunteers and 73% for the paid staff, the narrow focus of the survey means that generalisations about the whole sector can only be inferred. The Resource study is the most recent survey of volunteering within the sector, but because of the need to compare data from museums with that from libraries and archives, the sample for museums is relatively small, at only 166, a response rate of 33%. Even more so, no volunteers were included among the respondents.

Consequently while more up-to-date data exists, with which to compare Mattingly's results, inconsistencies in sampling and questions means that it is difficult to make comparisons. On this basis, Mattingly's questionnaire was repeated as closely as possible to obtain longitudinal data on the heritage sector and a current overview of volunteering within a specific sample of UK museums and galleries, that is those listed in the Museums Association Yearbook (Holmes, 1999). The data from the repeated Mattingly survey was compared with that from the original study, as well as the responses to the National Trust Survey, the BAFM Survey and the 1997 National Survey for Volunteering, a UK-wide survey of individual voluntary activities, to provide a comprehensive and up-to-date picture of volunteering in the UK heritage sector.

### **2.3 Why do Museums Involve Volunteers?**

During the past decade both the number of volunteers and the number of museums and heritage organisations has greatly increased, with the biggest growth in the independent sector, where the largest proportion of volunteers are involved (Carter et al, 1999).

One of the most fundamental questions is why do so many museums and heritage visitor attractions involve volunteers? This was one question which Mattingly did not ask in her survey, however she says that the impression was that for the majority of respondents it was a *professional duty* to provide opportunities for work experience, while the remainder implied it was because they needed to but did not give more explicit reasons, although clearly all-volunteer museums would not exist without

volunteers. Table 2.1 shows the most important reasons respondents to the 1998 update gave for involving volunteers.

**Table 2.1 The Main Reasons Why Museums Involve Volunteers**

Volunteers undertake tasks that would otherwise not be done	65%
Volunteers work on specific projects	53%
Volunteers help with back-logs of work	51%
Volunteers provide a link with the community	47%

*n = 184*

*Holmes, 1999:24*

While these were the main reasons, seven museums mentioned that involving volunteers enhanced their visitor experience and one respondent commented

*It is another way of allowing access to the collections and passing on information,*

while another said that,

*Volunteers are an essential addition to the resources of any museum...*

The responses show that volunteers make an important contribution to the museums and heritage sector. Not only do they undertake work, which would otherwise not be done, but they also provide the museum with a direct link to its audience, and community. These findings have been confirmed by the Resource study, which found that the most common reason for involving volunteers in museums is because it allows them to do things that they could not normally do (Resource, 2002).

#### **2.4 What do volunteers do?**

Table 2.2 shows the activities undertaken by volunteers across three of the surveys. Involvement in most of the activities mentioned by Mattingly has noticeably increased, however there appears to be a shift towards involving volunteers more in visitor-side

activities rather than behind-the-scenes work, which is shown by the increase in guiding and interpretation and the decrease in conservation and restoration. This perhaps reflects a wider move, with the danger of staff cuts and demands for professionalism, to involve volunteers in a more supplementary role, rather than in curatorial work. There has also been an increase in the proportion of volunteers working in front-of-house areas, from 33% in Mattingly's survey to a projected 77% in the BAFM survey. This reflects a recognition of the importance of the visitor experience in a more competitive visitor attractions market (Drummond, 2001) and the role volunteers can play in this.

**Table 2.2 Volunteer Activities in Museums and Heritage Organisations**

	1984 Survey	1998 Survey	BAFM Survey	Resource Study
Cataloguing and Documentation	67%	72%	83%	
Display and Exhibitions	26%	58%		61%
Guiding and Interpretation	33%	55%	77%	53%
Administration, funds and committees	11%	42%	70% -73% <i>i</i>	39%-46% <i>i</i>
Research	16%	53%		69%
Sales and Information	32%	45%		51%
Conservation and Restoration	47%	38%	80%	56%
	<i>n</i> =99	<i>n</i> = 184	<i>n</i> = 158	<i>n</i> = 152

*i* = These activities were listed under separate categories.

The National Trust data used very different categories such as Houses/Gardens, Countryside/Coast, Office & Professional, which mean that it cannot be included in Table 2.2. The BAFM survey is not directly comparable to either the original Mattingly study or the repeated Mattingly survey as different categories were used for volunteer work. Volunteer work in the BAFM survey was divided into three groups: Management, Front-of-House and Behind-the-Scenes. Volunteers were very involved in all categories of work with the highest proportion in Documentation or Registration

(83%), Reception and/or Visitor or Customer Care (81%) and Conservation (80%). This high proportion of volunteers working in conservation contradicts both Mattingly's recommendation and the repeated survey above. However as NADFAS groups were included in the BAFM survey, and their projects are conservation-oriented, this may have skewed these figures.

## **2.5 Who volunteers?**

Mattingly found that there is a connection between the different subject bases of museums and the gender of their volunteers. At art museums the ratio of men to women was 25:75; at historical museums the ratio was 60:40; at science museums it was 75:25; at site-based museums, for example an abbey, 30:70; and at mixed subject museums it was 40:60. This was confirmed by the 1998 survey, which found that while there were larger numbers of female volunteers than male there were more all-male volunteer work-forces than female. 51% of museums had more than 50% female volunteers, but only five were all-female, whereas 16 were all-male. The 1997 National Survey of Volunteering also found that male and female respondents tended to volunteer for different types of organisations. For example, men were more likely to volunteer for sports clubs, while women were more likely to be involved in social welfare groups. Both the BAFM and the National Trust surveys found that overall the male: female ratios of their respondents were even, at 50:50 and 53:47 respectively.

Age was also noted as a significant indicator of voluntary activity within the heritage sector. Of respondents to the 1998 survey, 43% said that the majority of their volunteers were aged over 61, which shows a substantial increase on Mattingly's figure of 20%. The BAFM and National Trust surveys also found a bias towards older volunteers amongst their respondents. 66% of respondents to the BAFM survey, 56% of respondents to the National Trust survey were aged 60 years or over. Indeed 82% of respondents to the National Trust survey described themselves as permanently retired. In addition, the Resource study found that 63% of museum volunteers were aged over 55 years, while 36% were aged over 65 years. As volunteers are increasingly involved in visitor-side activities this has meant more are required to work during the day and during the week, which makes it difficult for people working full-time to volunteer. Moreover, the need for volunteers during the week means that children and young people, whom Mattingly concluded may be excluded from volunteering, are even less

likely to be able to volunteer. These findings contrast with the 1997 National Survey of Volunteering, which found that people in paid work, rather than retirees, were most likely to volunteer. Although a significant proportion of respondents aged over 55 years volunteered in *hobbies, religion or the arts*. In addition, Davis Smith noted an increase in the number of people aged over 65 years from 34% of people aged 65-74 and 25% of people aged over 75 years in the 1991 National Survey of Volunteering (Lynn & Davis Smith, 1992) to 45% of people aged 65-74 and 35% of people aged over 75 years in 1997. Thus this shows that the proportion of older volunteers is increasing, which reinforces the growing relevance of research within museums and heritage visitor attractions for the wider voluntary sector.

The 1997 National Survey for Volunteering confirms that volunteers in all sectors typically have a high socio-economic status and this is also the case in the studies reported in this chapter. Mattingly found in 1984 that 63% of her respondents described their volunteers as either university or college graduates or postgraduates. Furthermore, 42% of managers described their volunteers' occupations as professional or managerial, while a further 33% were still in higher education. 39% of respondents to the 1998 survey described the majority of their volunteers as either having attended further or higher education. 27% of respondents described their volunteers as 'generally middle class' and 14% as professional or managerial. While this is not a statistically accurate way of identifying volunteers' exact backgrounds it does give an indicator of the type of people who are volunteering.

Thus, volunteers at museums and heritage visitor attractions tend to be older, retired people with a high level of educational attainment and a high socio-economic status. While volunteers within the wider voluntary sector share the socio-economic status, the typical volunteer has been in the past younger than the typical heritage volunteers, though there is evidence that this is gradually changing. However, the subject matter of the museum or heritage visitor attraction has a significant impact on the gender of the volunteers involved.

## **2.6 Why volunteer?**

Since this study is concerned with motivation, it is particularly important to review the reasons volunteers give for engaging in their activities. Respondents to the Mattingly



and 1998 surveys were asked to rank the main reasons why they thought volunteers were attracted to work in their museum. Table 2.3 compares these responses with the answers volunteers gave to the BAFM and National Trust surveys.

**Table 2.3 Why Do Volunteers Offer Their Services?**

1984 Survey	1998 Survey	BAFM Survey	National Trust Survey
Interest in subject	Interest in subject	I wanted to do something I would enjoy	I wanted to do something enjoyable
To obtain museum work experience	To support the museum	I knew of its work and wanted to volunteer here	= I knew of the work of National Trust and wanted to volunteer with this organisation = I had time to spare
Supporting the museum	Because they like the actual work involved	I had time to spare	I wanted to meet people
To fill spare time	To gain museum work experience	I wanted to meet people	I wanted to work in the environment
Like the work involved	To fulfil a social need	I was asked to help	I wanted to work in the heritage field
To fulfil a social need	To fill spare time	I wanted to do something unconnected with my present or previous paid job	I saw it as a chance to learn new skills
<i>n = 99</i>	<i>n = 188</i>	<i>n = 50</i>	<i>n = 723</i>

These responses show that since 1984 there has been a decrease in the relative importance of work experience as a motivator and this decrease has been acknowledged by managers, as well as volunteers. As the issue of whether potential museum workers

should gain voluntary experience as a prerequisite to paid work is constantly debated in the relevant journals (Gilchrist, 1999; Shea, 1999) this change is most likely to be due to the increase in the number of museum volunteers, with the greater proportion retired, as noted above. Also, as the type of work volunteers undertake has shifted, perhaps their enjoyment of their activities has increased.

*Interest in subject* can be equated with *something enjoyable*, as volunteers may consider an opportunity to learn more about their subject of interest as *something I would enjoy*. The volunteers clearly want to help the organisation, however social opportunities are also important. While fulfilment of social needs appears low on the list of reasons given by the managers for attracting volunteers, a quarter of respondents to the 1998 repeated survey commented that social interaction was the main benefit volunteers derived from their work, while 35 respondents mentioned job satisfaction or a sense of achievement, and 15 respondents mentioned pride in their heritage or a chance to give something back for the pleasure they have derived from their heritage. These responses correspond with those given by volunteers in the BAFM and National Trust surveys.

The difference between the reasons for volunteering and the benefits gained from the activity is also noted in the National Trust survey. While the reasons for volunteering with the National Trust are given above, respondents listed the following benefits:

- I really enjoy it (98%)
- I meet people and make friends through it (85%)
- It gives me a sense of personal achievement (78%)
- It gives me a chance to do things I am good at (74%)
- It broadens my experience of life (73%)

Only 21% stated that it may provide a route to full-time employment, thereby emphasising that work experience is only a motive for a fraction of volunteers. Notably, none of these benefits involves supporting the museum or heritage visitor attraction, though this may contribute to the *sense of achievement*.

These findings were further reinforced by the respondents to the BAFM survey. While 72% listed *I wanted to do something I would enjoy* as the most common reason for volunteering, only 5% saw it as *a qualification step leading to salaried employment in*

*the heritage field* (BAFM, 1998). These results and those from the 1998 repeated survey fit in more with the national picture given by the 1997 National Survey of Voluntary Activity (Davis Smith, 1998), which lists the main personal benefits gained from volunteering as: enjoyment of the activity; the satisfaction of seeing the results; meeting people; and a sense of personal achievement.

Mattingly found that museum volunteers often made a career out of volunteering, not only in heritage organisations but in a range of places. This was confirmed by the 1998 survey and the National Trust survey. The latter found that 53% of volunteers were involved in other forms of voluntary work, as were 47% of respondents to the BAFM survey. This again suggests that the heritage sector is an appropriate field for studying issues of relevance to the wider voluntary sector.

The volunteers in these surveys demonstrate considerable commitment to their activity. For example they are willing to travel long distances to their place of work, with 39% of respondents to the National Trust survey travelling over ten miles. Yet only 43% of volunteers claim travel expenses, though all are eligible, which is the same proportion as Mattingly's survey. This is not far from the national average of 48% of volunteers who receive expenses according to the 1997 National Survey of Voluntary Activity. 28% of respondents give their volunteers expenses in kind, such as free admission and discounts in the shop or cafe, although 37% of respondents admit to providing no recompense at all.

Only 27% of respondents to the BAFM receive travel expenses, although 40% receive other out of pocket expenses incurred through their volunteering and 51% of respondents to the Resource study pay their volunteers expenses. All National Trust volunteers receive travel expenses, paid by mileage, although only 43% of respondents actually claim these every time. This suggests that offering expenses is not a motivator for volunteers, but the absence of expenses may not serve to demonstrate the importance of volunteers' work to their organisation.

While managers believe that volunteers are attracted by their interest in the subject represented by the museum or heritage visitor attraction, volunteers are primarily interested in undertaking activities they enjoy, although these two statements are not

contradictory. Managers and volunteers do agree on the desire to help the organisation, but social opportunities rate more highly for volunteers than work experience. Notably volunteers are clearly committed to their work, with many travelling considerable distances irrespective of whether they are able to claim travel expenses.

### **2.7 How are volunteers managed?**

Volunteers should be managed in a way that both motivates and rewards them (McCurley & Lynch, 1998). The *professional* (i.e. treating volunteers as staff) approach to volunteer management provides both greater structure and support for their activities. Mattingly made a number of recommendations for more professional management of volunteers in her 1984 study, including that museums should formulate a volunteer policy and appoint a volunteer co-ordinator, that is someone with specific responsibility for volunteers. While 65% of respondents to the 1998 survey do have one person who is responsible for the volunteers at their museum which is higher than Mattingly's 52%, it is most likely to be the relevant curator, 28%, or the museum director, 25%. Only 6% of respondents to the 1998 survey had a paid volunteer co-ordinator. The Resource study found that while only ten respondents had a volunteer coordinator or manager, 57% had a paid member of staff with specific responsibility for managing volunteers. Of respondents to the 1998 survey, only 20% had written conditions of service for their volunteers. Although this is only a small proportion of respondents, this represents a substantial increase from Mattingly's 7%. A slightly higher number, 29%, of manager respondents to the BAFM survey stated that their organisation had a written statement of what they required from each volunteer and 41% of respondents to the Resource study had a volunteer policy, though it was not stated whether this was a written policy.

Significantly there has been an increase in the number of volunteers invited to help by museums and heritage organisations from the 1984 to the 1998 survey. This could well be symptomatic of the number of organisations, which are either having to supplement an ageing volunteer workforce or are starting a volunteer programme from scratch. The move towards involving larger numbers of volunteers in visitor service roles could also signify the need for a more active recruitment programme since not enough volunteers are offering their services. Table 2.4 compares the means by which volunteers are recruited.

**Table 2.4 How Volunteers Are Recruited**

	1984 Survey	1998 Survey
Volunteers offer their services	94%	88%
Volunteers invited	48%	62%
Interest through schools and projects	48%	17%
Local Societies	33%	22%
Local Media Appeals	23%	23%
Volunteer Bureaux	6%	15%

*n = 99**n = 188*

The paid staff respondents to the National Trust Survey also found that word-of-mouth, 50%, was the most effective form of recruiting volunteers with direct advertising, 33%, the next most effective along with adverts in the local press, 23%. In addition, the Resource study found that word-of-mouth and volunteers offering their services were the most common methods of recruitment. As heritage volunteers stated that their main reasons for volunteering were leisure-seeking it is hardly surprising that potential volunteers are most commonly recruited through the recommendation of existing volunteers whom they know. However, if word-of-mouth is the most effective means of gaining new and committed volunteers then motivating and rewarding existing volunteers forms an important part of the recruitment process. Museums and heritage visitor attractions will have to work very hard to recruit volunteers, by offering benefits such as travel expenses and by developing a better understanding of their volunteers' motivations so they can match people to the jobs they want to do.

The volunteer respondents to the National Trust survey stated that they wanted more involvement in management, with one-third wanting more opportunity to inform and influence decisions relating to their area of activity. Of respondents to the 1998 survey, 51% said that volunteers were able to contribute to policy making. Mattingly had only found 30%. Yet it was unclear from the responses how this would work in practice and how far volunteers' comments could actually reach management and be acted on. As the responses above show, large numbers of volunteers are retired professionals, and are therefore likely to be experienced at management and able to tell good management

practice apart from poor. Indeed the main disadvantage noted by volunteer respondents to both the National Trust survey and 1997 National Survey of Voluntary Activity was that *things could be better organised*.

Thus, best practice in volunteer management has been more widely adopted since 1984, its application is still limited to a proportion of the museums and heritage visitor attractions that involve volunteers. This limited application is reinforced by the National Trust volunteers, who want a more democratic style of management and better organisation of their activities.

## 2.8 The drawbacks of volunteering

The vast majority of volunteers reported that they were happy with their activity. 97% of National Trust volunteers said they were either quite satisfied or very satisfied with their volunteering and 98% of respondents to the BAFM survey described themselves as a 'happy volunteer'. However respondents did note drawbacks, as stated above. The drawbacks mentioned in the National Trust survey correspond closely to those stated in the 1997 National Survey of Volunteering. While respondents to both surveys note problems that may be related to the adoption of a *professional* approach, such as too much bureaucracy or their activities taking up too much time, the key problems are related to management, motivation and reward, and these confirm Croft's statements in her report to Resource, mentioned in Chapter One (Croft, 2001).

**Table 2.5 The Drawbacks of Volunteering**

1997 National Survey of Volunteering	National Trust Survey
Things could be better organised 71%	Things could be better organised 66%
You sometimes get bored or lose interest 34%	There is too much bureaucracy 46%
It takes up too much time 31%	You find yourself out of pocket 30%
You can't always cope with the things you are asked to do 30%	You don't get asked to do the sorts of things you'd like to do 27%
Your efforts aren't always appreciated 29%	Your efforts aren't always appreciated 19%
You find yourself out of pocket 29%	You sometimes get bored or lose interest in your volunteering 18%
You don't get asked to do the things you'd like to do 20%	You can't always cope with the things you are asked to do 10%

*n* = 419 *n* = c.700 (not given)

In contrast to the proportion of National Trust volunteers who do not claim expenses, three out of ten found themselves out-of-pocket and, combined with the one in five who felt that their efforts were not appreciated, this suggests a worrying level of discontent amongst the volunteers.

## 2.9 Attitudes of paid staff towards volunteers

Table 2.5 above shows that volunteers feel that they are not well managed. How do managers view their volunteers? Do they view them differently from paid staff and if so, how do paid staff view their volunteers? Table 2.6 compares the attitudes of museum and gallery managers who responded to the 1984 survey with responses to the 1998 survey. The 1998 responses show that volunteers are able to add an extra dimension to the museum or heritage visitor attraction, whether it is as simple as undertaking tasks that would otherwise not be done or through specialist knowledge or skills.

**Table 2.6 Managers' Attitudes Towards Their Volunteers**

	1984 Survey	1998 Survey
Volunteers are time-consuming	66%	42%
Volunteers are more trouble than they are worth	18%	0%
Volunteers are a danger to museum property	8%	0%
Volunteers are a link with the museum's community	78%	89%
Volunteers are a source of skills rarely found in the modern world	15%	69%

*n* = 99

*n* = 188

These responses are supported by those of paid staff to the National Trust survey in 1997. 97% of respondents thought that volunteers help the Trust to do things they could not otherwise do, and 91% felt that volunteers add something different to the work of the Trust. However, there are still tensions in staff-volunteer relationships, with 45% reporting that they thought volunteers are a threat to staff jobs and a similar proportion

stating that it is hard to draw a line between appropriate work for volunteers and paid staff. These last two responses show that whatever the impact of the *professional* approach to volunteer management, paid staff at the National Trust see a clear delineation between paid staff and volunteers.

### 2.10 Chapter summary

This chapter gave an overview of volunteering in museums and heritage visitor attractions through comparisons between four surveys of heritage volunteering. This data is further compared with the 1997 National Survey of Volunteering to show similarities between the wider voluntary sector and volunteers within museums and heritage visitor attractions. A longitudinal element was introduced by comparing Mattingly's 1984 survey with four surveys undertaken between 1997 and 1998. The picture all five heritage surveys present is one of volunteers who are mostly retired, and from higher socio-economic backgrounds. However, these socio-demographics vary between different types of museums, according to the subject matter. Compared to the wider voluntary sector the age difference is notable. Older people are less likely to volunteer in the wider voluntary sector, though the proportion of older people volunteering is growing. Therefore the heritage sector provides a suitable field for researching issues of growing concern to the wider voluntary sector.

The surveys show that there was a rise in the proportion of volunteers involved in museums and heritage visitor attractions and that they were increasingly being involved in front-of-house activities. The volunteer respondents reveal that leisure is the underlying purpose of their activities, rather than work experience, which signifies the proportion of retired volunteers. This also is symptomatic of the shift towards more visitor-oriented activities, front-of-house activities, and the need for greater numbers of volunteers to work on weekdays. This also means that people, who do not work full-time, such as retired individuals, are in greater demand.

Volunteer management in the UK is still inadequate according to the volunteer respondents. The extent to which *professional* procedures have been introduced is likely to vary significantly from organisation to organisation, based on factors such as the number of volunteers and the organisation's resources. A more structured approach to volunteering may help volunteers feel that their time is well spent, as the respondents to



National Trust survey noted when stating that they wished *things could be better organised*. Yet *professional* volunteer management practices, such as those recommended by Mattingly, may not be compatible with a majority of leisure-seeking, retired volunteers.

This is stated clearly by volunteers, when discussing the drawbacks. They complain that they are not able to undertake the activities they want, rather than that they do not feel rewarded or that their work is valued and worthwhile. What is clearly needed is a better understanding on the motivations of these volunteers and what management practices would encourage them to meet both their own and the museums' needs.

This chapter has presented an overview of volunteering within the heritage sector. The next chapter sets this within the wider literature of volunteer management and presents a theoretical framework for the study of volunteer motivation.

## Chapter 3: Review of the Previous Research

### 3.1 Introduction

Chapter Two reviewed six national studies of volunteering and detailed the extent of museum volunteering within the UK. These studies revealed that there were two key problems facing volunteers, that is, poor management and a lack of understanding by managers of the volunteers' motivation. This chapter sets out current practice and research in volunteer management and motivation. A model for good practice in volunteer management is discussed, alongside pressures facing the wider voluntary sector and, more specifically, the museums and heritage community, which have led to the introduction of *professional* volunteer management. Volunteer motivation is explored and traditional motivation theories are found to be inadequate in understanding volunteers' motivations. Three alternative, but related, models for motivating front-of-house volunteers are proposed.

### 3.2 Motivating volunteers

Researchers and practitioners alike agree that little is really understood about what motivates volunteers (Lapham, 1988; Pearce, 1993; McCudden, 2000; Chappell & Prince, 1997; Deery, Jago & Shaw, 1997). Volunteers are not paid and thus there is a different psychological contract between volunteers and the organisation where they work than for paid staff (Handy, 1988; Thomas, 2000). As this chapter will document, volunteers are rarely altruistic (Schram, 1985) and choose to volunteer based on a cost-benefit analysis of the benefits they will receive from their efforts (Thomas, 2000). Since the most common means of recruiting new volunteers is through word of mouth from existing volunteers (Davis Smith & Chambers, 1997; Jago & Deery, 1999) an understanding of volunteers' needs is crucial both to maintain and increase the volunteer workforce.

Researchers have noted that a weakness in studies of volunteer motivation is that they simply provide lists of *reasons for volunteering*, with little attempt at analysis and without attempting to relate them to the wide body of motivation theory (Cnaan & Goldberg-Glen, 1991; Pearce, 1993). Previous researchers have concentrated on devising checklist questionnaires for identifying potential volunteers rather than seeking

to advance our conceptual or theoretical understanding (Cnaan & Goldberg-Glen, 1991). Moreover, while Smith comments on the dangers of relying on any one theory (Smith, 1999), volunteer motivation cannot be viewed in isolation to the existing body of literature on work motivation. Motives are socially learned influences on human behaviour that lead people to pursue particular goals because they are socially valued (Huczynski & Buchanan, 2000). In a work situation motivation interacts with ability to lead to performance (Deci, 1992). While ability can be either selected or developed through training, what motivates people to work has been the subject of considerable research and has generated a variety of explanations (for example Maslow, 1943; Vroom, 1964; McClelland, 1961; Herzberg, 1966; Hackman & Oldham, 1980; Locke & Latham, 1984). Early studies of motivation were devised by psychologists within a laboratory setting (Murray, 1938; Maslow, 1943; Deci, 1992). However, from the 1960s studies focused on motivating workers (Vroom, 1964; Herzberg, 1966; Hackman & Oldham, 1980; Locke & Latham, 1984).

It has already been stated that since volunteers are not paid they have a different psychological contract with their place of work from paid employees (Handy, 1988; Thomas, 2000). Pay is widely held to not act as a motivator among paid employees (Herzberg, 1966; Moss Kanter, 1987), rather its absence is a source of dissatisfaction. Moreover, researchers have found that volunteers are rarely altruistic, that is, offering their services for no personal gain (Schram, 1985), rather volunteers expect to benefit in some way from their activities (Moore, 1985). Indeed the term *pro-social* is used in preference to altruism as it suggests that volunteers are socially minded but also expect to gain from their activities (Pearce, 1993). In addition, volunteer motivation has been relatively neglected in contrast to studies of paid workers' motives (Pinder, 1985). Therefore, in this chapter, traditional motivation theories are applied to the concept of volunteering to establish how far they aid our understanding of volunteers' motives.

Motivation theorists have either focused on the content of motivation, i.e. what people hope to gain from their efforts, or on processes of motivation, ways in which rewards can be offered to promote good performance (Deci, 1992). The major proponents of content theories are Maslow, with the influential Hierarchy of Needs (Maslow, 1943; Watson, 1996) and Herzberg's work-based hygiene factors and motivators (Herzberg, 1966). Maslow and other need theorists (Murray, 1938; Alderfer, 1972) argue that

individuals are motivated to pursue a series of innate and learned needs. The most important needs, in so much as they must be fulfilled first, are existence needs, such as food, shelter and safety. The higher needs, which individuals seek to meet once existence needs are fulfilled include social needs and achievement. While the existence, or lower, needs may not be significant motivators for typical volunteers, as noted in Chapter Two, since they tend to come from the higher social classes and are likely to be able to afford enough food and clothing, these factors may help to explain why volunteers are limited to these groups. If volunteering only meets higher needs then only individuals who seek to fulfil these needs will be attracted to volunteer. However, need theories have been criticised in that they are largely unsupported by empirical evidence and are difficult to test (Wahba & Bridwell, 1987), having been devised during a series of laboratory experiments.

Herzberg's work offers a more flexible content theory of what motivates individuals. Herzberg divides Maslow's lower needs and higher needs into hygiene factors and motivators, arguing that existence needs are not motivators, rather their absence leads to dissatisfaction. Within hygiene factors Herzberg includes extrinsic motivators, that is, they can be controlled by others and include external factors such as pay, work environment, social opportunities, and learning new skills. Volunteer researchers have commented that managers should take Herzberg's theory into account when considering rewards (Wilson, 1976; Osborne, 1999; Smith, 1999). Volunteer rewards typically suggested in volunteer management guides include paying out-of-pocket expenses, tea breaks, thank you dinners, and long-service awards (Fletcher-Brown, 1987; Millar, 1991; Kuyper, 1993). However, while these rewards may be important, as their absence could lead to dissatisfied volunteers, Herzberg's theory states that they are not actually motivating volunteers. Instead intrinsic rewards, that is motivators which originate from within the individual (Deci, 1975; Pinder, 1985; Frey, 1997) and which can include feeling useful and keeping the mind active, are considered more motivating for paid staff and therefore even more so for volunteers. Not surprisingly, researchers have promoted intrinsic motivation as the impetus behind volunteering.

Pearce (1987) and Lapham (1988; 1990) separately conducted a series of experiments both in the field and in laboratory settings to examine the importance of intrinsic motivation for volunteers. Pearce applied Deci's theory (1975) on the importance of

intrinsic motivation to volunteers. Deci proposes the sufficient justification thesis. This suggests that people need sufficient justification to work, and that this is usually met with pay. Pearce argues that volunteers often suffer from insufficient justification for their activities. However, Pearce's study found that volunteers working alongside paid staff were more likely to report social and service motives, than the intrinsic motive of finding the work interesting, and she questions the significance of intrinsic motivation alone as a basis for volunteer rewards.

Lapham built on Pearce's earlier work, although her main findings were that volunteers have a greater need for justification for engaging in unpaid work in organisations where paid staff are working alongside volunteers. Lapham drew on equity theory in her explanation of the volunteers' greater need for justification in their work. Equity theory is a work-based motivation theory, devised initially by Adams (1963), which states that individuals seek equity with their co-workers. For example, if an individual is paid less than their co-worker they will seek to rectify this inequality. They may decide to expend less effort, or they may ask their boss for more equal pay. The weakness with equity theory is that it ultimately does not explain what action an individual might take. While Lapham's volunteers sought justification through increasing their intrinsic motivation, other volunteers may simply reduce their efforts or the quality of their activities. Since this is a concern noted by managers both within the wider voluntary sector (Pearce, 1993) and within museums and heritage visitor attractions (Greene, 1992), Lapham's research identifies a potential problem area, rather than suggests solutions.

Thomas (2000) reviews Frey's economics-derived theory on volunteering, which repeats Deci and Pearce's proposals that financial reward and other extrinsic rewards have a negative effect upon volunteering. Frey contends that since volunteers choose to work without pay they are intrinsically motivated (1997). Thomas states that Frey's theory has certain implications for volunteers in museums and heritage visitor attractions. These are that since intrinsic motivation increases with closeness between the organisation and the volunteers, there is inherent interest in the task. Thomas argues that this would lead to volunteers being concentrated in small museums and heritage visitor attractions and that volunteers would be more interested in their work than paid staff. While Thomas provides no empirical evidence to support the latter supposition, there is evidence both to support and refute the former statement. Volunteers are

involved in large numbers at small, medium and large museums and heritage visitor attractions (Mattingly, 1984; Holmes, 1999). Thomas does conclude that Frey's theory suggests volunteers prefer softer management styles to paid workers and that while they need rewards, these must not be in the form of pay, or similar to pay, such as a restaurant voucher.

If intrinsic motivators are the most significant drivers for volunteers, how is this reflected in the surveys reported in Chapter Two? Both respondents to the BAFM survey and the National Trust survey said that the main reason they volunteered was to do something enjoyable, that is, they wanted to engage in activities that are interesting in themselves. They also wanted to help the organisation, which suggested they were pro-social in their motives, though not altruistic; they had time to spare and they wanted to meet people. The latter point depends on factors outside the individual's control and is an extrinsic motivator, though it is only fourth on the list. What about benefits? 98% of respondents to the National Trust survey stated that they really enjoyed their activities, which again suggests they are intrinsically motivated; however, the second most important benefit, rated by 85% of respondents, was that it was an opportunity to meet people and make friends. This brief analysis suggests that intrinsic motivators are more important in attracting volunteers, but extrinsic factors may be equally important in retaining volunteers.

Osborne applied the need theories of Maslow (1943), Herzberg (1966) and McClelland (1961) – the latter is the proponent of another content theory that states that people have a need for achievement, affiliation or power - to a sample of retired volunteers in museums in South-west England (Osborne, 1999). Her findings showed that volunteers were primarily affiliation seekers and that through their network of relationships at the museum their social needs as defined from Maslow's hierarchy, were being met. While she noted some missing hygiene factors her most significant finding was that volunteers were content with their work and did not seek additional development of their skills. Osborne equated this with Maslow's concept of self-actualisation, his highest level of needs, in that the volunteers had met all their needs through their activities. She concluded that so long as the museum could provide social opportunities, the volunteers would be retained. This finding places greatest emphasis on an extrinsic motivator, but that does mean it is a factor the organisation can influence.

While content theories seek to identify what motivates individuals, with little thought to how they might seek to meet these motives, process theories examine the way in which motives can be used. Process theory research concentrates on expectancy and goal setting. Vroom first formalised expectancy theory (1964), which assumes that people's behaviour is the result of conscious choices (Pinder, 1985). Individuals hold certain preferences for outcomes, and their emotional response towards these outcomes is termed *valence*. Since individuals value outcomes differently they may feel positively, negatively or neutrally *valent* towards a particular outcome. *Instrumentality* is the belief that an act will lead to a particular outcome and *expectancy* is the level of satisfaction an individual expects to derive from a particular outcome. Vroom contends then that an individual's motivational force can be measured by the following equation:

$$Force = valence \times instrumentality \times expectancy \text{ (Vroom, 1964)}$$

The value of motivational force may be low if an individual is negatively valent towards the outcome, that is, they do not believe that their actions will lead to this outcome or that this particular outcome offers them little satisfaction. Expectancy theory, unlike some content theories, acknowledges that individuals may have different preferences (Pinder, 1985). It also states that individuals know what these preferences are.

Goal-setting is a motivational technique developed by Locke & Latham (1984), however it is often considered a motivational theory because of the assumptions it makes about individuals' responses towards offered motivators. This technique involves setting employees specific, measurable and achievable targets. Research has found that work groups that have been set goals are higher achieving than those who have not. Locke & Latham argue that this is because workers relish challenges, but note that goals must not be too demanding or they will demotivate employees. Burke and Lindsay believe that most behaviour is goal-oriented (Burke & Lindsay, 1985) and that this is equally the case with volunteers as with paid workers.

Puffer and Meindl examined the effects of incentives on volunteers' performances in relation to how these incentives matched the volunteers' motivations (Puffer & Meindl, 1992). They found that it is very important for the supervisor to provide incentives that the volunteer values or the volunteer may think that the supervisor does not understand

or respect their motives. This supports both expectancy theory and goal-setting as an effective motivational tool, if properly used.

Puffer and Meindl also noted that incentives may be used to transmit the organisation's values and influence the volunteer's performance to conform to these values, and thence primarily benefit the organisation rather than the volunteers. Puffer and Meindl concluded that an organisation may need to choose between productive volunteers, where incentives are given that are based on how their motives fit in with the organisation's values, and happy volunteers where incentives are given purely on the basis of the volunteers' motives. Indeed, in a study of volunteers at Wimborne Museum (Osborne, 1993), the volunteers' strengths lay where their motivations coincided with the organisation's needs.

Volunteer researchers comment on the complexity of volunteer motivation (Millar, 1991; Pearce, 1993; Smith, 1999). This complexity suggests that need theories may be too general to aid our understanding of volunteering. Volunteer motivation becomes even more complex when volunteers themselves may not be clear as to why they offer their services (Moore, 1985). Indeed, Ilsley found that the longer a volunteer had worked at an organisation the less able they were to articulate their reasons for continuing to be there (Ilsley, 1990). Pearce supports this by suggesting that organisations should not waste time on trying to decipher volunteers' motives at the recruitment stage (Clary, Snyder & Ridge, 1992; Bales, 1996). In fact managers should focus on providing valued rewards once the volunteer is working (Pearce, 1987). This suggests that process theories cannot explain volunteer motivation either, as these theories assume that individuals can articulate their needs. All individuals have a variety of motives, but this has not deterred researchers from seeking to understand what motivates paid workers (Vroom, 1964; Herzberg, 1966; Locke & Latham, 1984). Moreover, since unsatisfied volunteers will be frustrated in their activities (Pinder, 1985) and likely to leave it is even more important to seek to understand their motives. Since traditional theories of motivation do not provide an adequate explanation of what motivates volunteers, more recent research conducted specifically with volunteers, may aid our understanding.



### 3.3 Research on volunteer motivation

Morrow-Howell & Mui (1989), Puffer & Meindl (1992), Caldwell & Andereck (1994), Parker (1997a), Smith (1999) and Graham (Graham *et al*, 1998; Graham, 2000a) offer classifications of volunteers by their motivation. Morrow-Howell & Mui, Puffer & Meindl and Caldwell & Andereck propose that volunteer motivation is a combination of three groups of motivations.

#### Box 3.1 Three Groups of Volunteer Motives

- Normative motives, which are altruistic
- Rational motives, which are based on self-interest, such as work experience
- Affiliative motives, where opportunities for social interaction and acceptance as part of a group are the primary motives

Source: Puffer and Meindl, 1992: 425

These three groups of motives apply to the benefits described by respondents to the surveys documented in Chapter Two. These are that volunteers wish to help the organisation - altruistic; they want to meet people – affiliative; and a fifth of respondents to the National Trust survey were hoping to gain work experience (Davis Smith & Chambers, 1997) - rational.

Smith differentiates between younger work experience-seeking volunteers and older volunteers, whom she contends are primarily seeking social opportunities. Parker argues that there are four key motivational characteristics which influence volunteers while Graham offers a classification system based on mapping volunteers from Glasgow museums onto Parker's matrix. Parker's four key motivational characteristics are altruism; market volunteering, i.e. they expect rewards in return for their efforts; cause-serving; and mutual aid, that is leisure volunteering (Parker, 1997a). These four classifications are similar to Handy's classification of voluntary organisations as mutual support, service delivery or campaigning (Handy, 1988). While all-volunteer museums may be considered to be mutual support organisations, in that they were set up by a group of volunteers in order to pursue their own interests (Bishop & Hoggett, 1986), the vast majority are service delivery organisations. Handy argues that volunteers in a service delivery organisation are more likely to accept being treated as paid staff

(Handy, 1988). However, research documented below will show that this is simply not the case with museum volunteers and this is likely to be because they are not just the service providers, but are also service users.

Parker's work is part of a body of literature which views volunteering primarily as a leisure activity (Parker, 1997a; Stebbins, 2001), but does not link this with literature examining work motivation, which leads to possible oversimplification (Stebbins, 2001) and concern for volunteer managers on how to deal with ostensibly leisure-seeking volunteers (Pearce, 1993; Graham, 2000a). Volunteerism as leisure is discussed further in 3.5.

Current research and theory on motivation is of varying usefulness in examining what motivates volunteers. A brief analysis of responses to the surveys reviewed in Chapter Two suggests that intrinsic motivators may be the key to attracting volunteers, but a combination of intrinsic and extrinsic factors are important in retaining volunteers. This is supported by Ilsley (1990) and Pearce (1993), who found that motivation changes over a volunteers' career, and Osborne who found that social opportunities were the most important motivator among retired volunteers in museums in the south west of England (Osborne, 1999). Both Parker (1997a) and Graham (2000a) cite leisure as a motive for volunteering which contrasts with the increasingly professional approach to volunteer management being adopted across the voluntary sector. Among studies of volunteers in museums, age has been cited as a variable relating to an individual's motivation (Osborne, 1999; Smith, 1999; Graham, 2000a). It is assumed that this is because museums and heritage attractions attract older volunteers more than other organisations, therefore the significance of age and retirement must be considered in any study of volunteers in this sector. Finally, any analysis of a person's motivation to work must take into account the individual's characteristics – their interests, attitudes and needs, the characteristics of the job and the working environment (Steers & Porter, 1987).

The literature on motivation illustrates the two philosophical paradigms for viewing volunteers: the economic model and the leisure model. The economic model was proposed by Weisbrod (1978) and analyses volunteers as filling the gaps in provision between the private and public sectors. The policy importance of volunteers is their

contribution to the economy. This means that it is justifiable to measure the ‘work’ of volunteers and compare it to the economic contribution of workers in other sectors of the economy. This approach was taken in the Sports Council research ‘Valuing Volunteers’ (Gratton et al, 1998). Thus the economic model considers volunteers as unpaid workers. However, there are two theories for volunteer motivation. The first is that volunteers make a conscious decision based on a cost-benefit analysis of their activities (Thomas, 2000). The second is that volunteers are altruistic, since they do unpaid work (Frey, 1997) and are intrinsically motivated.

In contrast, the leisure model considers the act of volunteering to constitute a leisure experience. This approach finds its origins in the UK with Hoggett and Bishop’s study of voluntary leisure groups (Bishop & Hoggett, 1985), but this premise has been developed further by other researchers (Henderson, 1984; Stebbins, 1992; Parker, 1997a). The leisure model proposes two theories of motivation: social exchange theory, whereby volunteers are pro-socially motivated but, as with the economic model, they gain benefits from their activities (Phillips, 1982), and pure leisure, which is an intrinsically rewarding activity in itself (Henderson, 1984).

These two contrasting models suggest very different means of motivating volunteers and they will be considered separately.

### **3.4 The economic model**

Over the past decade the voluntary sector in the UK has begun to adopt a *professional* approach to volunteer management (Institute of Volunteering Research, 1998). Traditionally volunteer management in the UK has taken an ad hoc approach, as detailed in Mattingly’s (1984) study. Features of the ad hoc approach include having no one individual with responsibility for the volunteers; no induction or training programme, including basic health and safety training (rather, training is on-the-job); no repayment of volunteers’ out-of-pocket expenses; and no standard. The surveys analysed in the previous chapter reveal that this ad hoc approach is still evident in many museums and heritage visitor attractions (BAFM, 1998; Holmes, 1999). Since Mattingly’s study, museums and heritage visitor attractions in the UK have faced a number of influences, both external and internal, which have promoted a more

structured approach to volunteer management, termed *professional volunteer management* (Davis Smith, 1996). This consists of managing volunteers as unpaid staff.

#### Influence from the US

The professionalisation of volunteer management finds its roots in the US and Canada, where volunteers have long undertaken a very formal role as docents. A series of practical guides to good volunteer management from the US and Canada are now widely available, both for the wider voluntary sector (Wilson, 1976; Fletcher Brown, 1987; Fisher and Cole, 1993) and more specifically for arts organisations and museums (Kuyper, 1993; Cooper, 1996). These guides all focus on the recruitment, motivation and retainment of volunteers. The US and Canadian guides agree that good volunteer management means:

- Job design;
- Staff commitment;
- Well-planned recruitment;
- Careful screening and selection;
- Appropriate training;
- Good supervision;
- Appropriate surveillance;
- Adequate recognition and rewards;
- Systematic evaluation;

Above all, these guides stress the importance of a volunteer co-ordinator, whose job description is solely to liaise with and manage the organisations' volunteers. The volunteer co-ordinator is often a different person from the volunteer's line manager,

“The volunteer co-ordinator is most like a personnel manager....” (Blackman, 1981: 300).

Indeed, professional volunteer management seeks largely to replicate personnel practices with a volunteer workforce (Cunningham, 1999) and is characterised by a top-down approach to management. These guides reflect the greater emphasis on volunteers as co-workers in the US, illustrated not least by the establishment of the American Association of Museum Volunteers in 1979.

External pressures within the UK

Increasing competition for both funding and visitors coupled with the requirements of funding bodies for museums and heritage organisations to demonstrate competent management practice, has had its impact on volunteer management. The National Lottery, introduced in 1994, also forced museums and heritage visitor attractions to pay more attention to volunteers within their workforce when making applications to the Heritage Lottery Fund as volunteer hours are costed and can be counted for matched funding. Indeed, changes in lottery funding, as a result of the 1997 National Lottery Act, mean that volunteer training projects and personnel can now be included in larger bids. As well as these influences, the trends for best practice in all areas of industry and the growing need to account for public funds has led to a demand for a more *professional* approach to volunteer organisations, not least from the volunteers themselves. Millar comments that “Volunteers are more aware of their rights; they are developing high expectations” (Millar, 1991: 27) in relation to the way in which they are managed.

Since the launch of the Citizen’s Charter in 1992, successive UK governments have pioneered various initiatives in order to encourage a customer-led approach from organisations across different sectors, and to encourage active citizenship through social inclusion policies, the national curriculum in schools and the creation of a learning society. As with all other sectors, museums and heritage visitor attractions, particularly those in the public sector, have needed to respond to these initiatives.

In particular, Investors in People (IiP) has implications for better training and appreciation of employees, paid and unpaid alike. A National Training Task Force developed the Investors In People National Standard in 1990. Investors in People, is a government initiative that encourages organisations to value their staff. The purpose is to match employees’ skills and motivations with the organisations’ requirements, through better training, communication and evaluation. In particular, it is aimed at improving customer care and the organisations’ competitive advantage by ensuring that employees deliver a quality service. Organisations wishing to become Investors in People undertake an assessment of between 6 and 18 months to see if they can achieve the standard. In 1997 the Museums Training Institute reported that 101 museums had committed to or achieved the IiP standard (Cultural Heritage National Training

Organisation, 1997). *Investors in People*, is focused on improving workers' motivation in order to provide a better service.

#### Internal pressures in the UK

The move to a more *professional* approach to volunteer management mirrors moves towards professionalisation within the UK museums profession. These moves are illustrated by the Museums Association's change to an associateship based on continuous professional development rather than examination. The Cultural Heritage National Training Organisation has established National Vocational Qualifications and Standard Vocational Qualifications in museums and heritage work, open to volunteers and paid staff alike. There has been a growing recognition that curatorial training is not always adequate preparation for managing a museum and more and more managers from outside the museums sector are moving into the field, while museums training courses have introduced management modules (CHNTO, 2000; Heywood, 2002).

The assimilation of good practice procedures within UK museums and heritage visitor attractions also owe much to the introduction of Museum Registration, which sets standards for museums to achieve before they can be eligible for certain funds. Museum Registration was introduced by the Museums and Galleries Commission in 1988 as a minimum standards scheme which measures museum performance against professional standards (Babbidge & Ewles, 2000). When introduced, Museum Registration was one of the first sector-wide quality initiatives for public sector organisations. Registration was begun in partnership with the Museums Association and the Association of Independent Museums, and museums are assessed by peer review. Registration is voluntary but to qualify for certain sources of funding a museum must be registered. There are now two phases of registration: phase one sets basic standards which museums are encouraged to achieve, while phase two sets higher goals for museums which have already achieved phase one. Registration requirements include management plans for both the collections and the museum. They state the need to set policies and plan for the future, and museums are invited to re-register every five years.

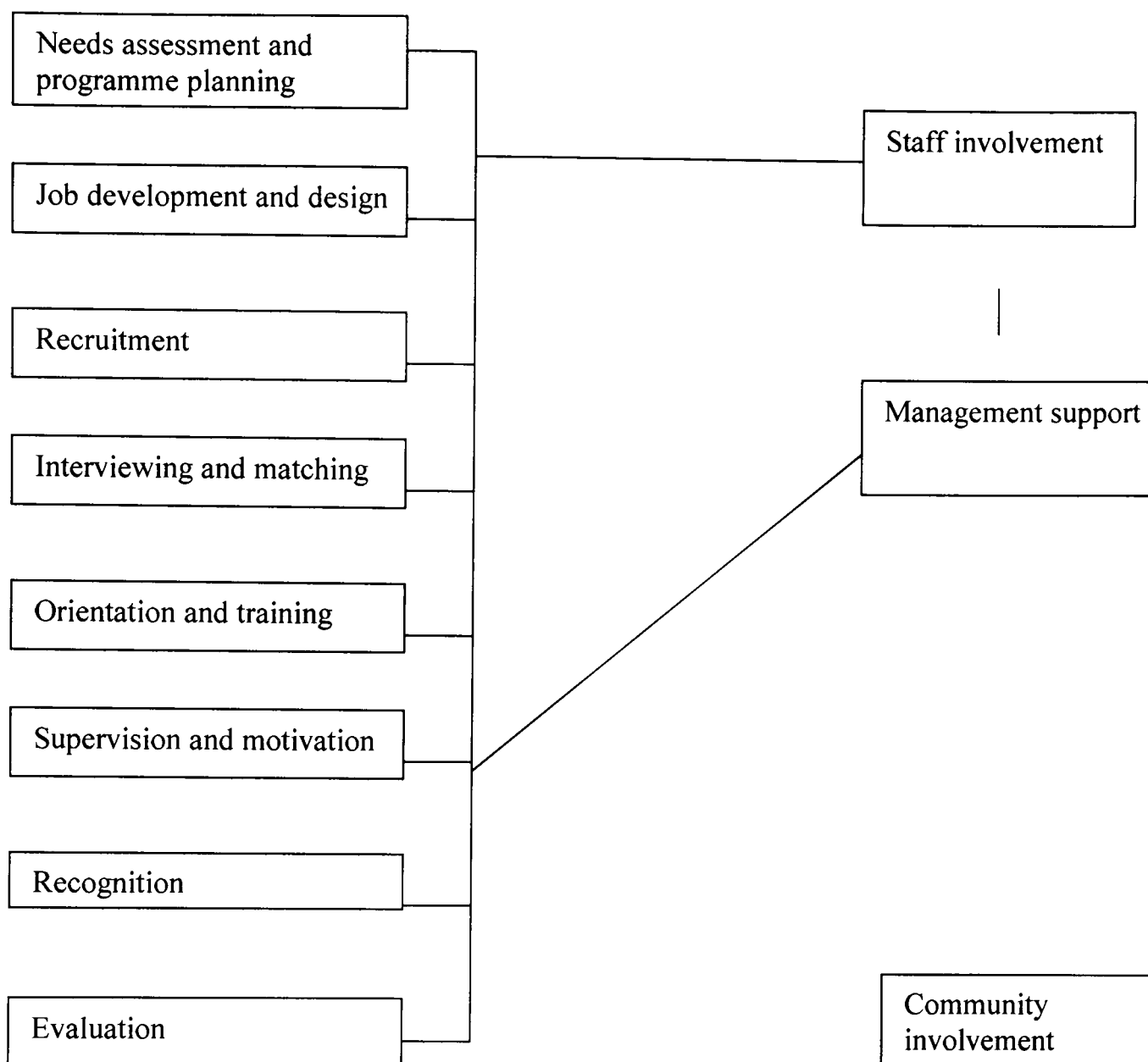
The Museum Registration process and standards have recently been reviewed on behalf of Resource (Babbidge & Ewles, 2000). Thus internally the museums and heritage

sector has sought to improve their professionalism through standards by which they can measure themselves and be measured by others.

*Professional volunteer management in the UK*

The voluntary sector has sought to respond to this *contract culture* by introducing the *professional* approach of US and Canadian organisations to volunteer management in the UK (Hedley & Davis Smith, 1994; Davis Smith, 1996; Institute for Volunteering Research, 1998; Cunningham, 1999). The number of practical UK guides on volunteer management has grown over the past decade (Willis, 1991; Volunteer Centre UK, 1992; McCurley & Lynch, 1998; National Centre for Volunteering, 1998). These guides have been augmented by handbooks, designed specifically for museums (Millar, 1991; Lord & Lord, 1997; Goodlad and McIvor, 1998; BAFM, 1999; Graham, Foley, Hughes & Litteljohn, 1999). McCurley and Lynch propose a less formal approach from that used in the US and Canada. Their Volunteer Management Process is replicated in Figure 3.1.

Figure 3.1 McCurley & Lynch's Volunteer Management Process (1998:19)



McCurley & Lynch follow the US model, including job design, interviewing volunteers, training and supervising volunteers once recruited, and evaluating both the programme and the volunteers' work. Their model emphasises that paid staff are involved in the whole process, management support is essential and, depending on the work volunteers do, the community may be involved in the evaluation process such as evaluating the service that volunteers provide. The *professional* approach includes a volunteer coordinator (who may be paid or unpaid), volunteer agreements (similar to employee contracts), keeping records of training and experience and developing a volunteer



policy. These characteristics mirror good practice in personnel management (Cunningham, 1999).

Take up of *professional* management procedures across the voluntary sector in the UK has varied. However, research conducted by the Institute of Volunteering Research found that four out of five organisations have a volunteer co-ordinator, 85% have a written volunteer policy and 31% calculate the economic contribution of their volunteers (Institute of Volunteering Research, 1998). This professional approach has been endorsed by various writers across the heritage sector (Bean, 1994; Walter, 1995; Falconer, 1996; BAFM, 1999; Murch, 1999; Hull, 2001).

While the professional approach advocates treating volunteers as unpaid staff, guides to volunteer management do recognise that volunteers may require a softer managerial style (Cunningham, 1999) and that they must be rewarded for their efforts as *volunteers do not come free* (Millar, 1991: 70). The economic model focuses on ensuring that the volunteers are not left out-of-pocket from their activities and thus extrinsic rewards are offered. These include travel expenses, vouchers for lunch and parking and end-of-season dinners. An exemplary rewards system is that of the National Trust. National Trust policy states that:

“although volunteers offer time freely and willingly and without binding obligation, there is a presumption of mutual support and reliability. Reciprocal expectations are acknowledged.” (National Trust, 1999:5)

National Trust volunteers receive travel expenses and after 50 hours of service in each calendar year they are awarded a volunteer card, which gains them free entry into National Trust properties and discounts in National Trust restaurants and shops. In addition, individual properties may organise an end-of-season ‘thank you’ dinner or visits to other properties. This contrasts with the 1997 National Trust survey, reported in Chapter Two, where volunteers stated that the benefits gained from their activities, were to meet people and make friends as well as a series of intrinsic benefits.

### **3.5 Research in volunteer management**

The *professional management* model presented above is aimed as a practical guide for volunteer managers. However, research on museum volunteers has examined more

closely the volunteers' response to a structured management approach. Elliott (1996) researched the impact of 'for-profit' management procedures on an existing volunteer programme at Kew Bridge Museum. Elliott's study found that volunteers were concerned that the adoption of *for-profit* management procedures would destroy the *friendly atmosphere*, as volunteers think of the museum as *part museum and part social club*. Indeed one volunteer went on to say:

“...the beautiful thing about being a volunteer is that there is no obligation.”  
(Elliott, 1996: 39)

The volunteers were concerned that formal commitments, such as job descriptions, would put too much pressure on them. More formal management procedures would precipitate change, which could alienate volunteers.

Osborne's study, mentioned above (1993), focused on Wimborne Museum where all the volunteers are retired. The majority of volunteers worked at the museum because they wanted to meet people and make friends and concentrated on these relationships rather than completing their work tasks. Osborne found that this problem was not unique to Wimborne and one professional curator of another small independent museum in South-west England complained that he felt as if he had inherited a *private retirement club*. Osborne's study noted the importance for the organisation's and volunteers' needs to coincide and that when they did the volunteer's strengths were evident.

Volunteering at Wimborne museum was something the volunteers could do once they were retired, which they equated with being free from the constraints of work, control and responsibility. Their reasons for volunteering were mostly social and the professional staff were unable to impose any control as there was only a limited number of volunteers in Wimborne, with the Minster and the local National Trust property considered to hold more kudos and were more popular places to volunteer.

While Elliott and Osborne conducted research with existing groups of volunteers, McIvor set up a volunteer programme, based on a study of volunteer programmes in Science Museums in Canada and the United States, at the National Museum of Science and Industry in London (McIvor, 1996; Goodlad and McIvor, 1998). McIvor examined the feasibility of introducing a programme of adult volunteers at the Science Museum and conducted consultation with the staff. She found that staff concerns included the

need to establish a structured approach to volunteer management, and in particular that volunteers should be treated like paid staff, not least to ensure that standards did not fall. Initially volunteers were involved in special events to celebrate National Science Week in 1995, with 26 volunteers and 1996, with 22 volunteers. All the volunteers were involved in front of house activities, including stewarding, assisting with workshops and assisting with catering. The volunteers were asked to fill in evaluation questionnaires at the end of the week and all who responded stated that it had been a rewarding experience and they would volunteer again.

McIvor investigated the motivations of her volunteers and found that they were highly motivated because they were both learning themselves and helping others to learn, they gained immediate feedback from both visitors and staff, and had a high degree of autonomy in that they could just leave. These volunteers were trained and deployed as staff, but their motivations to work and perceived benefits were found to be more akin to those of visitors. She concluded that volunteers are *effectively visitors who participate actively*.

Finally, Smith (1999) examined volunteer management in a series of literary heritage case studies. She identified two groups of volunteers: socially-motivated older, retired 'Mature Volunteers', and younger career-oriented 'Experience-Seeking Volunteers'. Among her case studies the Mature Volunteers dominated numerically. Smith proposes a human resource system for volunteer management, with motivation as a separate element in order to emphasise its importance. However, her analysis of her respondents' motives does no more than reiterate the lists of benefits reported by respondents to the surveys in Chapter Two, that is, volunteers are motivated by a combination of altruism, social opportunities, interest in subject, and availability of time. Smith does note that the move towards professionalisation may be welcomed by Experience-Seekers, but that this may deter the more numerous Mature Volunteers. Of more significance she states that the volunteer experience comprises of the interaction of volunteers with the various stakeholders involved in the museum or heritage visitor attraction, including managers, other volunteers, other paid staff, visitors, the organisation itself and the community, thereby highlighting the importance of social opportunities to volunteers, as illustrated by their responses to the surveys reported in Chapter Two and the summary of motivation research presented above.

As Smith found, volunteering in order to gain work experience within museums and heritage visitor attractions is common and responses to the Mattingly survey and the 1998 repeat survey, reported in Chapter Two, show that managers consider work experience to be a significant motivator. Moreover, they are a sector-specific attribute, as the 1997 National Survey of Volunteering found that overall only a small number of volunteers were seeking training and skills development (Davis Smith, 1998). Work-experience seekers are considered separately in studies of volunteer motivation and have been variously analysed as market volunteers (Parker, 1997a; Graham, 2000a), who are gaining experience to help them gain paid employment, and occupational volunteers (Stebbins, 2001). However, the responses of the volunteers themselves show that work-experience seekers make up only a small proportion of all volunteers. Since work experience-seekers are gaining something quite clear and tangible from their activities their motivation is of little mystery and will not be explored further in this study.

The introduction of a more structured *professional* approach to volunteer management in museums and heritage attractions has been greeted with a mixed response. This mirrors doubts in the wider voluntary sector (Davis Smith, 1996; Cunningham, 1999) and the unquestioning adoption of US models of management (Meijs & Hoogstad, 2001), based on the economic paradigm of viewing the contribution of volunteers. There are clear advantages for both managers and volunteers, with better training and supervision. Volunteers would know more clearly to whom they should report with problems or questions, and their contribution would be properly acknowledged. Managers could develop a trained workforce that is committed and reliable. Yet, as highlighted by Osborne (1993), Elliot (1996) and Smith (1999), volunteering in the heritage sector is also a leisure activity, with a large proportion of socially-motivated retired volunteers. The leisure model of volunteering is presented below.

### **3.6 The leisure model**

Various researchers have noted that volunteering is a leisure activity (Jarvis & King, 1997; Burrus-Bammel & Bammel, 1997; Parker, 1997a; Smith, 1999; Graham, 2000a; Holmes, 2001). More significantly McIvor (1996) called volunteers *active visitors*. However, thus far, research on volunteering and leisure has been limited (Stebbins, 2001). This is significant as if, as stated above, volunteering is a leisure activity then

this will have ramifications for the widespread adoption of a *professional* approach to volunteer management (Pearce, 1993). While volunteers may not welcome the structured approach, which could remind them too much of paid work (Elliot, 1996), volunteer managers may worry whether leisure-seeking volunteers will be reliable (Pearce, 1993; Graham, 2000a).

Is volunteering a leisure activity? Hood devised six attributes that make up an enjoyable leisure activity based on a study of visitors at Toledo Art Museum (Hood, 1980; 1983). These are the attributes visitors look for in a leisure experience. If they expect to find these at a museum they will visit a museum, rather than another leisure venue. Since volunteers may be active visitors they may well look for these attributes in their own leisure experiences. These attributes are listed in Box 3.2.

### **Box 3.2 Six Attributes of an Enjoyable Leisure Experience**

- challenge of new experiences
- doing something worthwhile
- feeling comfortable in one's surroundings
- opportunity to learn
- participating actively
- social interaction

*Hood, 1983:51*

Hood's six characteristics of an enjoyable leisure experience bear a close resemblance to the motives and benefits given by respondents to the five surveys reported in Chapter Two, and they contain a mixture of intrinsic and extrinsic factors, as expected. This suggests that volunteers do derive similar benefits from their activities as visitors derive from their visit, supporting McIvor's assertion that volunteers are active visitors.

In this vein Henderson sought to find out what motivates people for leisure and therefore what might motivate them to volunteer. She divided all the time available during the day into four categories:

### Box 3.3 The Four Divisions of Time Available During the Day

- Employment/Paid work
- Work-related time, e.g. travel and lunchbreaks
- Obligatory time, e.g. sleeping, washing
- Unobligated free time

Source: Henderson, 1984: 56

Volunteering figures in the fourth category of unobligated free time, as does leisure, rather than in work-related time. This would explain why people might volunteer at their place of paid employment, for example, at a welfare organisation. It is not because they wish to prolong their hours of work but because they view their volunteering in a different way to their paid work.

This theorisation helps describe the problems managers experienced with volunteers at Wimborne Museum using the museum like a social club (Osborne, 1993). While for paid staff Wimborne Museum is a place of work, for volunteers it is a place for leisure. Henderson also used McClelland and Atkinson's theory of motivation, as did Osborne, to analyse the volunteers in her study, and she also found that they were primarily affiliation-motivated. She concluded that volunteer managers can benefit from her findings by providing volunteers with opportunities which will be perceived as worthy of leisure, and by emphasizing the *recreative* aspects of volunteering as a technique for recruitment (Henderson, 1979, 1981).

Leisure activities can be divided into casual and serious leisure (Henderson 1979, 1984; Stebbins, 1992, 1996a, 1996b, 1997, 2001). Casual leisure

“can be defined as immediately, intrinsically rewarding, relatively short-lived pleasurable activity requiring little or no special training to enjoy it” (Stebbins, 1997:18) Casual leisure activities include watching television, sociable conversation and recreational drugs. Serious leisure involves considerable effort on the part of the participant and leads to a career in the chosen pursuit.

The concept of volunteering as a form of serious leisure was first coined by Stebbins (Stebbins, 1992), who has identified six attributes of serious leisure which are listed in Box 3.4 below.

### Box 3.4 Six Qualities of Serious Leisure

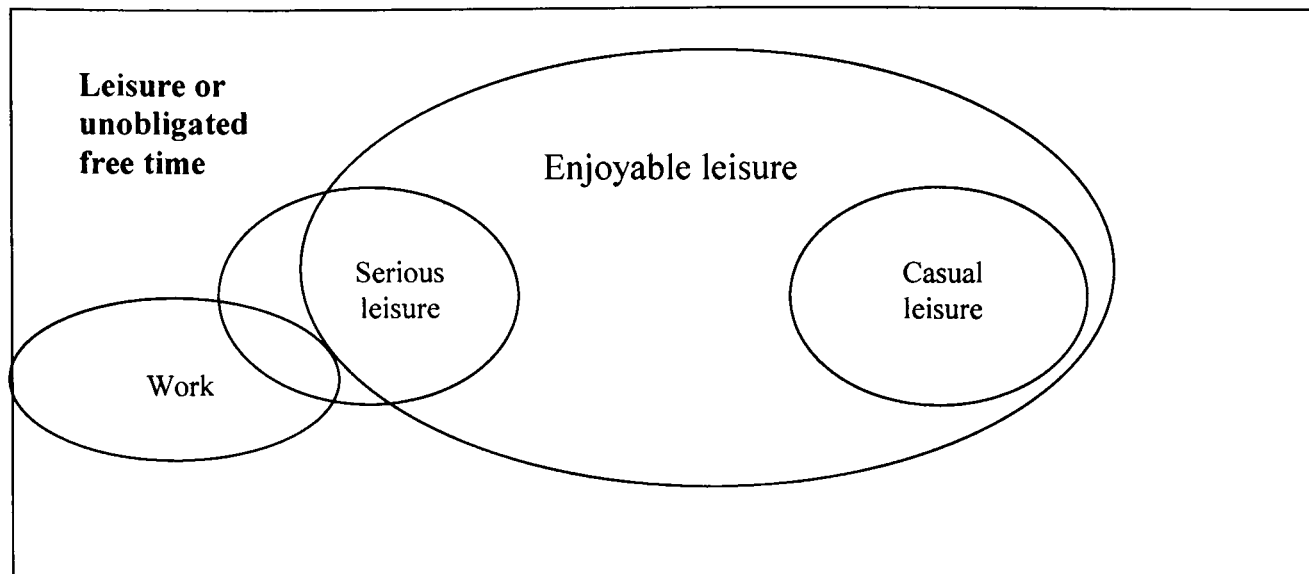
- The occasional need to persevere
- Participants find a career in the endeavour
- The pursuit demands significant personal effort based on specially acquired knowledge, training or skill
- There are eight durable benefits: self actualisation, self-enrichment, recreation or renewal of oneself, feelings of accomplishment, enhancement of self-image, social interaction and belongingness, lasting physical products of the activity.
- Each group of serious leisure participants develop their own ethos or sub-culture
- Participants identify strongly with their chosen pursuits

Source: Stebbins, 1992: 7

Since volunteering demands effort on the part of the volunteer it is considered to be serious leisure (Stebbins, 1996a, 1996b, 2001; Nichols & King, 1998; Harrington, Cuskelly & Auld, 2000). Stebbins notes in particular that leisure volunteering is inspired by self-interest on the part of the volunteer and that serious leisure volunteering is career volunteering, rather than a one-off act or a series of sporadic acts of volunteering such as giving blood (Stebbins, 2001). Indeed it is the participant's commitment and the development of a career which help to distinguish serious leisure from casual leisure (Cuskelly, Harrington & Stebbins, forthcoming).

The benefits of serious leisure bear similarity to the motives and benefits stated by volunteer respondents to the surveys in Chapter Two, notably feelings of accomplishment and social interaction. Moreover, the drawbacks of volunteering, which respondents noted, suggest that these volunteers do face the occasional need to persevere. The drawbacks of serious leisure and the level of commitment or a career, which are required, suggest that there are elements of serious leisure, which do not fit simply within the enjoyable leisure model. This can be more clearly presented in Figure 3.2 below. This diagram proposes that enjoyable leisure is a sub-set of leisure, which consists of all activities conducted within unobligated free time. Some of these activities, such as serious leisure, may be generally enjoyable but includes elements, such as the need to persevere, which fall outside the boundaries of enjoyable leisure. Since these include aspects of work, this is also represented on the diagram.

Figure 3.2 Enjoyable, serious and casual leisure and work



The purpose of Figure 3.2 is to illustrate the relationship between serious leisure and enjoyable leisure, thus casual leisure has been placed within the enjoyable leisure sector, but any further theorisation of casual leisure falls outside the focus of this thesis.

Researchers have applied the concept of serious leisure to volunteers in a range of organisations (Arai, 1997; Parker, 1997a; Harrington, Cuskelly & Auld, 2000). In particular Graham devised a typology based on Parker's work (Graham, 2000a) and identified five groups of volunteers. These are Instrumental Hobbyists, who are older, leisure-seeking volunteers; Community Activists, that is, a group of trusted, retired professionals who are relied upon, but will strongly resist any changes they do not support; Active Citizens, who are more altruistic volunteers, willing to do mundane tasks; Instrumental Economic Volunteers, those who volunteer in order to further their career prospects; and Student Volunteers, who are on a formal placement from their studies. Graham's typology was strongly rooted in one group of museums, many of which were part of the same museums service (Graham, 2000a). For example, her Community Activists were all members of the museums service's Friends Association and as a consequence were able to volunteer, and lobby, within a range of museums. Not all museums have a Friends organisation or link it with their active volunteers (Holmes, 1999).



Nichols and King applied serious leisure to an analysis of volunteering with the Girl Guide Association and found that volunteers did experience a career, with their motivations changing accordingly. Younger guide leaders were more likely to be motivated by a wish to help the organisation, while longer-serving, older volunteers were more motivated by the social networks they had developed (Nichols & King, 1998). In particular they have noted increasing pressures felt by existing volunteers, such as increased time, and attributed this to both a recruitment problem and the introduction of *professional* management procedures. These pressures are noted by other researchers focusing on the UK sector (LIRC, 1996; Jarvis & King, 1997), and emphasise the need to develop a better understanding of volunteers' motives and how these may contrast with managers' needs.

Serious leisure offers many of the rewarding attributes that may be experienced through paid work. Stebbins does suggest serious leisure as a means of meeting the needs of individuals who have too little or no work, such as retired people (Stebbins, 1998). However, while there may be the need to persevere with the activity, unlike work there is no sense of obligation for leisure volunteering. When the obligation is forced, this is no longer a leisure activity and the individual is encouraged to abandon the activity (Stebbins, 1998).

Parker argues that serious leisure is a middle class pursuit, which promotes middle class values such as cultivating and developing skills, spending leisure time constructively and constructing an identity from the leisure pursuit, which Parker argues is an expression of individual responsibility (Parker, 1997b). Volunteering primarily attracts individuals from the higher socio-economic groups (Davis Smith, 1998). While Parker's study does not have high external validity, it does suggest that there is likely to be a correlation between individuals who volunteer and individuals who engage in serious leisure and that there are likely to be individuals who combine these activities.

Both Hood's enjoyable leisure experience and serious leisure propose key motivators which are doing something worthwhile, opportunity to learn and social interaction, while serious leisure also requires commitment. A comparison between leisure theory and responses to the surveys reported in Chapter Two presents the leisure paradigm as a compelling model for considering volunteering. However, research in this area has been

limited by its failure to engage with the wider literature on motivation. The economic model and the leisure model have been considered in isolation by most researchers, the exceptions being Henderson (1979, 1984) and Silverberg, Backman & Backman (2000). This debate has been further complicated by researchers, who have focused specifically on older volunteers, and propose volunteering as a substitute to work and a retirement leisure activity.

### **3.7 Retirement, reengagement and continuity**

As stated in 3.4 this thesis focuses on volunteers who are not seeking work experience, therefore the role of leisure among older retired individuals must be considered. Both the BAFM (1998) and National Trust (1997) surveys detailed in Chapter Two demonstrated that heritage volunteering within museums and heritage visitor attractions is largely a retirement activity.

Smith (1999) noted that while volunteers and visitors shared many characteristics, they were not from the same age groups and life stage. Moreover, if volunteers are active visitors, as stated by McIvor (1996), then is volunteering another stage in the visitor life cycle for the regular visitor? The involvement of older volunteers is likely to become a more important issue as the proportion of older people within the population grows, and the older population is increasingly active (Foresight, 2000). The importance of involving the growing older population in voluntary activities, is stated by commentators (Hadley & Scott, 1980; Fischer & Schaffer, 1993). This is also recognised by the UK government who have recently established Experience Corps, an independent non-profit making company seeking to attract 250, 000 volunteers aged over 50 by March 2004 (Volunteer Investment Programme, 2002). This action follows successful efforts in the US to encourage volunteering among older people (O'Reilly & Caro, 1994). Since heritage volunteering is a retirement activity, heritage volunteering may offer a model for involving older people in our increasingly aged society.

Participation in leisure activities outside the home has been linked closely to changes in the life cycle (Rappoport & Rappoport, 1975) and there are two key theoretical approaches to examining volunteering among older people: disengagement theory and activity theory. Out-of-home leisure participation undergoes a significant change at retirement. Indeed, there is a general decline with age in the range and frequency of

participation in out-of-home leisure (Roberts, 1999). The impact of retirement on out-of-home leisure participation has been much researched. Since Rappoport and Rappoport's study in 1975 there has been a significant increase in the number of people retiring before statutory age. This has been matched by an increase in life expectancy (Laczko & Phillipson, 1991). While in the UK today one in five adults is a pensioner, in 20 years time this will increase to one in four (Worcester, 2000).

One theoretical branch of research has focused on the process of disengagement. When people retire, it is argued that not only are they disengaging from their working lives, but from public life. In contrast to other forms of disengagement, such as children leaving home, retirement is an abrupt change. These transitions in growing older usually involve relinquishing, rather than taking up, new activities. This is illustrated by the decrease in museum visiting among older people (Merriman, 1989). However, some researchers suggest that freedom from family and working commitments opens up new opportunities, as many people at this stage in life have decades of active life ahead of them, with their mortgages paid and no dependants to support.

Retirement, as an abrupt occurrence, leaves people with a large expanse of time to fill. However, Wearing (1995) and Stebbins (1998) argue that retirement offers older people the opportunity to continue their personal development and provides a source of fulfilment rather than devaluation in their Third Age. Research among early retirees has found that leisure participation met needs often addressed by paid work in younger age groups, such as companionship and social recognition (Tinsley et al, 1987).

A comparison between the 1991 National Survey of Volunteering and the 1997 National Survey of Volunteering (Davis Smith, 2000) found that in spite of expectations of disengagement, volunteering among older people had risen. Older volunteers were most likely to be involved in hobbies, recreation and the arts, and were more likely to cite personal reasons for volunteering, such as time to spare or social benefits. Barriers to volunteering among older volunteers were cited as income, competition from other leisure activities, ageism, lack of information, transport and apathy. In addition, the 1997 National Survey of Volunteering found that people from a managerial or professional background were twice as likely to volunteer than people from an unskilled background and these differences were evident amongst retirees as well as other age

groups.

Gerontologists believe that it is not only individuals who benefit from their activities. As volunteers they are also performing an active role in retirement and this is termed as productive ageing (Atchley, 1993; Bass, Caro & Chen, 1993; Okun, 1994). By being productive, older volunteers not only receive benefits from reengaging in society, but also promote a more positive image of active and useful older people (Fischer & Schaffer, 1993; Herzog & Morgan, 1993; Davis Smith, 2000). This is likely to become even more important as declining birth rates and increasing life expectancy in the UK mean that younger people are under more pressure to support an ageing population (Worcester, 2000).

In contrast to theories of disengagement and reengagement, volunteering amongst older people is also considered to be evidence of activity theory. Activity, or continuity, theory states that retirees are continuing to perform the same leisure activities as before they retired, and by maintaining an active older life they are more content than inactive older people (Atchley, 1993; Mannell, 1993; Kelly, 1997). Retirees are unlikely to choose an entirely new leisure activity (Chambre, 1993; Roberts, 1999). Their choice of leisure activities is likely to demonstrate continuity, especially through their involvement with voluntary organisations and intellectual or artistic interests (Long, 1987). However, activity theory does acknowledge that individuals may alter their means of pursuing an interest. With the loss of work roles, volunteering may be required to substitute for these (Chambre, 1993). While volunteers may have had an interest or an involvement in the organisation they now help out, it is the loss of work roles that has prompted them to take a more active role.

Individuals reaching retirement age today are more likely to have been exposed to higher education (Chambre, 1987) and a range of alternative leisure activities. Indeed those aged 55-64 years are now the most economically powerful age group (Worcester, 2000). Therefore this age group may be less likely to disengage in retirement and activity, or continuity, theory seems more appropriate.

While research shows that the majority of volunteers in museums and heritage visitor attractions are retired (Davis Smith & Chambers, 1997; BAFM, 1998; Smith, 1999)

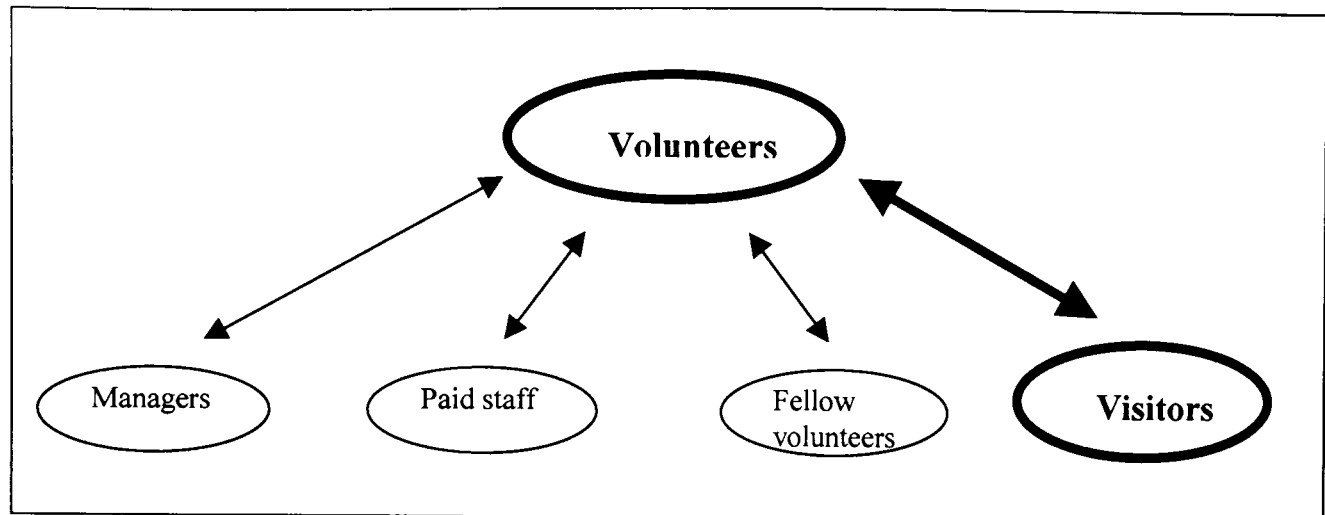
there has been no research to examine when these individuals started volunteering, and what role retirement has, if any, in decisions to volunteer. Volunteers may use volunteering as a means of reengaging in society and thus it serves as a substitute for work in retirement. This would suggest that volunteers are engaged in unpaid work. However, as 'interest in the subject' was a commonly cited reason for volunteering (Mattingly, 1984; Holmes, 1998; Smith, 1999), heritage volunteering may be a means of continuing a leisure interest, in which case volunteering would constitute a leisure activity.

### **3.8 An interaction model of volunteer motivation**

Both the economic and leisure paradigms have sought to investigate volunteer motivation. Research from the economic model has focused on motivating the volunteers in order to gain the best work from them. Research within the leisure tradition has focused on the meaning of volunteering to the volunteers themselves, but has mostly examined this in isolation from volunteer management. This section proposes a model of volunteer motivation, which synthesizes both research paradigms.

Smith stated that volunteering was the result of the volunteer's interactions with various stakeholders, including the managers, other volunteers, other paid staff, visitors, the organisation and the community (Smith, 1999). In her study, written from within the economic paradigm, she focused on the interactions between the volunteers and their managers. Studies of volunteer motivation from both paradigms have repeatedly stated that social opportunities and affiliation needs are primary motivators for volunteers (Henderson, 1984; McIvor, 1996; Osborne, 1999). The surveys reported in Chapter Two show that volunteers are increasingly being involved in front-of-house activities, and therefore they are expected to interact with visitors, at least, as the focus of their activities. Thus, this thesis proposes that volunteers are motivated by their interactions with other individuals and that the key interaction is with visitors.

*Figure 3.3 An Interaction Model of Volunteer Motivation*



### **3.9 Research Propositions**

On the basis of the above literature review this study makes two propositions regarding the motives of older volunteers.

Proposition I: Volunteers are motivated by the interactions provided by their activities

Proposition II: Volunteers are motivated by pro-social reasons

Proposition one states that extrinsic motivations are the primary benefit, that is they are motivated by their interactions (This will be further developed in the next section). Proposition two states that volunteers are primarily intrinsically motivated. That is, they are primarily motivated by internal pro-social reasons, wanting to do something worthwhile and help the organisation and its customers

The research will examine volunteers' interactions in order to establish which proposition best describes the motives of older volunteers.

To further develop this conceptual framework for the study of volunteers' interactions, three models of interaction between the volunteers and the visitors are presented: the service encounter, the host-guest encounter and peer tutoring.

### 3.10 Three models of volunteer interaction

Successful social encounters depend to a certain extent on the participants developing rapport (Gremler & Gwinner, 2000). Rapport has been delineated as having two dimensions: enjoyable interaction and a personal connection between the participants. Smith describes volunteer interaction with visitors as a part of the service delivery process (Smith, 1999), but this does not take into account the volunteers' perspective. If they are leisure-seeking then they may not consider themselves to be service providers. Therefore three models for encounters between front-of-house volunteers and visitors are proposed: the service encounter, the host-guest encounter and peer-tutoring. The first two models draw explicitly on the volunteers' needs for social opportunities, while peer tutoring draws more on the needs for learning and development, which form part of an enjoyable leisure experience (Hood, 1983) and a serious leisure activity (Stebbins, 1992). There are clear similarities between the service encounter and the host-guest encounter. The service encounter is derived from the economic paradigm, while the host-guest encounter is derived from the leisure model.

#### a) The service encounter

Several researchers have stated that volunteers are a part of the service delivery process in museums and heritage visitor attractions (Smith, 1999). Identifying and evaluating quality is essential for the service provider, and museums and heritage attractions are providing a service. There are six characteristics, which distinguish the service product at a visitor attraction and these are presented in Box 3.5.

#### **Box 3.5 The Six Characteristics of the Visitor Attraction as a Service Product**

- Staff are involved in producing and delivering the product are part of the product
- The customers themselves are involved in the product process
- The products are not standardised
- The product is perishable and cannot be stored
- There is no tangible product to carry home
- The surroundings of the service delivery process are a feature of the product

*Swarbrooke, 1995: 182*

At a museum or heritage visitor attraction the service encounter, that is interaction between the visitor and paid staff or volunteers, is a part of the service product: the visitor experience. There has been considerable research on the service encounter

between the customer and the front line staff (Bitner, 1990; Bitner, Booms & Tetreault, 1990; Ryan & Dewar, 1995; Palmer, 1998; Gremler & Gwinner, 2000; Gremler, Gwinner & Brown, 2001). The service encounter is a:

“social occasion of economic exchange in which society allows strangers to interact” (Czepiel, 1990:13)

Research shows that the service encounter is the most significant factor in a customer’s evaluation of a service firm (Gronroos, 1984; Bitner, 1990). The service process can be divided into two sub-processes: the *instrumental performance*, which is the technical result of the service product, for example at a steam railway it would be a ride on the steam train; and the *expressive performance*, which relates to interactions with staff or volunteers at the railway (Gronroos, 1984). Thus service quality is divided into technical quality, the measure of the instrumental performance, and functional quality, the measure of the expressive performance. Instrumental performance is a necessary part of the service process, but on its own it will not create customer satisfaction. The significance of the expressive performance is particularly important for organisations where there is little differentiation between the products (Gronroos, 1984). The expressive performance (i.e. the service encounter) gives service organisations their competitive edge.

McCallum and Harrison call service encounters “first and foremost social encounters” (1985:35). The service encounter is a specific form of social interaction, where prior acquaintance of the individuals involved is not required. This is a relationship where it is socially acceptable for strangers to talk to each other as they have a shared purpose, for example in the case of a volunteer guide and a visitor it is the guide’s role to provide information in a pleasant and easily digested manner. Yet such encounters are limited in their scope, and the conversation will focus on the service product. Moreover, each participant in the encounter has their role clearly defined and there are basic sets of rules, which allow these strangers to interact (Czepiel, Solomon & Surprenant, 1985). Both volunteers and visitors will have different expectations about the visit, and they will also have different expectations of what makes a satisfying encounter. For example, some visitors may prefer to visit entirely on their own with as little interaction with fellow visitors, paid staff and volunteers as possible. Others may seek the opposite experience and want to talk to everyone they meet.



The most satisfying service encounters occur when the people involved *interlock*, that is, both participants want the same outcome from the encounter and share the same expectations of each other's role within the encounter. Customers evaluate service encounters on the basis of a comparison with past experiences (McCallum & Harrison, 1985). It is thought that people organise their memories of previous encounters into templates, which govern subsequent similar experiences. Even if the encounter is entirely new, the nearest template will be employed. Previous experiences have set the standard against which subsequent encounters will be measured (Gronroos, 1984). Satisfaction will be achieved when the encounter either meets or exceeds these customer criteria. Since researchers have suggested that volunteers are also customers (McIvor, 1996; Wymer & Brudney, 2000), then it is equally important for the volunteers to experience satisfying encounters.

#### b) Host-Guest encounter

During the 18th and 19th centuries owners of private collections or country houses opened their doors to visitors, literally acting as hosts to the guests in their house (Mandler, 1997). Within the discipline of tourism studies the concept of hosts and guests was coined in 1977 to describe the publication of a series of case studies presented at the American Anthropological Association symposium on tourism and culture change in 1974 (Smith, 1992). The case studies included in this edition were studies of the impact of Western tourism on indigenous cultures. However, since 1977 researchers have employed the host-guest concept as a means of modelling investigations of the tourist-tourist interface and providing a base for analysis of the point where the two interact and form relationships. The host-guest encounter, also referred to as tourist-host contact, is any time when the tourist comes into direct contact with the host, such as a local taxi-driver, hotel staff, tour guide or staff at a visitor attraction. Thus the host-guest encounter is also a type of service encounter (Reisinger & Turner, 1997). However, while the service encounter model of volunteer-visitor interaction is derived from the economic paradigm, the host-guest encounter comes from leisure research. The tourist-host encounter has both the potential to increase harmony between the two groups or to cause further divisions,

“...tourist-host contact can result in mutual appreciation, understanding, respect, and tolerance...However, the same tourist-host contact may develop negative attitudes,

prejudices, hostility, suspicion, and even violent attacks.” (Reisinger, 1994: 25)

While early host-guest studies (Smith, 1978) focused on the impact of the guest on the host’s culture, the focus has now shifted onto the guest or tourist.

“The phrase has become almost a byword to describe hospitality involved in receiving and entertaining outsiders.” (Smith, 1992: 187)

Indeed, as quoted above, the whole concept of the host-guest model today is to improve service quality. Without quality of service there are no guests,

“Good service is a quality of mind, an intent to please, and a genuine concern for the guest; it cannot be commoditised or bought.” (Smith, 1992: 196)

Service quality can be taught, for example, with the English Tourist Board’s Welcome Host training package. It should be noted that this training package explicitly uses the word *host*. Moreover, there are promotional benefits from tourist-host contact, such as repeat visiting and better market segmentation, enabling tourists’ needs to be better met,

“It is not just statistics on tourism visits that are of interest, but which tourists are making the visits and the meaning of these visits to the different groups of tourists and to their hosts.” (Prentice, Witt and Wydenbach, 1995: 122)

Research has identified five characteristics, which describe a typical tourist-host encounter:

### **Box 3.6 Five Characteristics of the Tourist-Host Encounter**

- Personal relationships are transitory.
- Both parties are oriented to immediate gratification.
- The contact involved is asymmetrical in terms of the host’s knowledge and the tourist’s money and status.
- The situation is novel for the visitor.
- There is usually an important cultural distance separating the participants.

*Pearce, 1982: 70*

These five characteristics bear similarity to Swarbrooke’s service encounter, except on two key points: firstly, that the situation may not be novel to the visitor and secondly,

research on visitors' demographics shows that they are very similar to the volunteers in that the higher socio-economic groups are over-represented (Merriman, 1991), although visitors do tend to be younger than volunteers. Therefore there seems to be little cultural distance between the volunteers and visitors, rather they are at different stages of the life cycle. Pearce notes that in a more advanced resident society the impact of guests and hosts is less pronounced, and tourists may develop not only friendships with their hosts but can help sustain local institutions and promote pride in the locality (Pearce, 1982).

Smith has recently identified a specific form of host-guest encounter, which occurs within a museum context. Here hosts act as *culture brokers* (Smith, 2001), making culture accessible to the guests in much the same way as the owners of country houses in the eighteenth and nineteenth centuries. The role of a culture broker clearly demands a degree of knowledge and hosts as culture brokers sets them apart from service providers. The hosts here are providing access to information, rather than simply a service.

Moreover, the host-guest encounter between a volunteer and a visitor may be closer to a true host-guest relationship since

“Interpersonal conflict between hosts and guests is minimal where their respective standards of living are similar...” (Smith, 1978: 4)

An inhibitor of classic host-guest relationships is that,

“...catering to the guests is a repetitive, monotonous business, and although questions posed by each visitor are ‘new’ to him, hosts can come to feel that they have simply turned on a cassette.” (Smith, 1978: 6)

Volunteers work on average for only a few hours, or perhaps one day, each week (Mattingly, 1984). They are therefore less likely to find the work as monotonous as paid staff (Pearce, 1984), remain more motivated for longer and therefore provide a more stimulating host role for visitors.

As noted above, there are clearly similarities between the service encounter and the host-guest encounter. However, the key differences between these two models, is the

role the volunteers themselves believe they are playing as culture brokers, rather than service providers.

c) Peer tutoring

Since a major feature of the front-of-house volunteer's role is to impart information to the visitor, could interaction between volunteers and visitors constitute peer tutoring? Peer tutoring takes place between equals and is a mutual learning experience. McIvor and Goodlad (1998) report on a project conducted at the Science Museum to establish a programme of volunteer interpreters, drawing heavily on work they had previously conducted on student tutoring at Imperial College. Goodlad's research had shown that peer tutoring was a mutually beneficial experience for student tutors, the school pupils they tutored and the teachers at the school where the student tutoring took place. Imperial College established the Pimlico Connection as a model for student tutoring. The Pimlico Connection was developed from a pilot project funded by the Leverhulme Trust in 1975 and began with 12 students from Imperial College visiting Pimlico School for 15 weeks to assist in teaching science to secondary school pupils. The project grew and in 1987 the University Grants Committee provided a grant for the extension of the Imperial College model to other universities as a means to improve science teaching.

Research conducted with the participants in the Pimlico Connection found that students reported the following benefits:

- Good practice in communicating scientific ideas
- Increased self-confidence
- Reinforcement of knowledge of own subjects
- Opportunity to get to know people with a different social background
- The feeling of doing something useful

These are a combination of intrinsic and extrinsic benefits.

Pupils reported these benefits

- Lessons are more interesting
- Lessons are easier to follow
- Lessons are more enjoyable.

The importance of benefits for the tutors is acknowledged as part of the programme as, like volunteering, peer tutoring must be reciprocal. The students are not simply cheap substitutes for teachers (Goodlad, 1995). To be successful the Pimlico Connection has found that the aim of the project should not be too complex and should not attempt too much; the content must be clearly structured, but flexible enough for the student to add their personality; the tutors must be trained and supported with, for example, appropriate teaching materials. The student tutoring of the Pimlico Connection is not specifically peer tutoring as university students are tutoring schoolchildren rather than other students, or indeed people their own age.

Andrew Bell first used peer tutoring in a systematic way by in 1791, when he began to use children to teach other children at the Military Male Asylum at Egmore. Joseph Lancaster also used schoolchildren to teach other schoolchildren at the school he founded in Belvedere Place, London in 1801 (Goodlad, 1995). In spite of this early interest peer tutoring waned in the UK.

In the US peer tutoring took off with Youth Tutoring Youth, a project started in 1967 in New Jersey and Philadelphia (Topping, 1988). Unlike volunteering, the tutors were paid for their services. The project found noticeable improvements in both the tutee's and tutor's reading skills. Moreover, out of the 200 tutors involved only seven dropped out, the rest showing a clear enthusiasm for the project (Topping, 1988). While peer tutoring continued to exist in the UK prior to Goodlad's work in establishing the Pimlico Connection, this was only in an ad hoc, informal manner. While tutors may be paid in the US, in the UK they usually just receive their travel expenses and tutoring is considered a voluntary activity (Topping & Hill, 1995).

Aside from Goodlad and McIvor's study above, the focus of research on peer tutoring has been on cognitive benefits (Sharpley & Sharpley, 1981; Topping, 1992). Both peer and cross-age tutoring have been found to be equally effective, thus older volunteers should be able to communicate effectively with all age groups of visitor (Topping, 1996). Topping notes that the traditional form of peer tutoring, whereby more able students helped less able, has been superseded in the face of limited resources. It now constitutes

“People from similar social groupings who are not professional teachers helping each other to learn and learning themselves by teaching” (Topping, 1996: 55)

Peer tutoring offers a model for the volunteer role as an interface between the exhibit and the visitor, again acting as a cultural broker (Reisinger & Turner, 1997). However, it is unlikely that the volunteer will always play the tutor and the visitor the tutee, and indeed both may hope to learn informally from their role.

The three types of encounters proposed above are not mutually exclusive, rather they are ideal models for examining volunteer interaction with visitors. While the service encounter has been examined in a commercial context the role of volunteers in service provision is a neglected area, in spite of recognition of their importance as the public face of the museum or heritage visitor attraction. However, as *active visitors* (McIvor, 1996) volunteers may well not consider themselves to be service providers. Instead they may view themselves as hosts or peer tutors. If this is the case then the management of these volunteers needs to be sensitive to their self-perception and the benefits they hope to gain from their activities. These three models of interaction form the conceptual framework for this study, while the key research questions will focus on whether volunteers are primarily motivated by interaction, and are therefore extrinsically motivated, or by pro-social action and are therefore intrinsically motivated.

### **3.11 Chapter summary**

Traditional content and process theories of work motivation fail to provide a clear cut model for volunteer motivation. Previous studies of volunteer motivation have generated various lists of both motives and benefits experienced by volunteers, but there has been little advancement in theory. Researchers agree that volunteer motivation is complex and liable to change over time. Moreover, researchers disagree as to whether volunteers are intrinsically or extrinsically motivated, and how far they expect some return for their efforts or are altruistic.

Research on volunteer motivation has also been generated from two paradigms: the economic model, which views volunteers as service providers to be managed *professionally*, that is, as unpaid employees; and the leisure model which views volunteers as engaging in a leisure activity. There has been little synthesis between

these two contrasting views and the majority of research in both these paradigms has failed to address volunteer motivation within the wider motivation literature.

However, researchers from both traditions have agreed that social interaction is an important motivator for volunteers. Therefore work-experience seekers have been disregarded from this study. The large proportion of older volunteers within the heritage sector means that this age group need special consideration, particularly regarding whether volunteering constitutes a substitute for work in retirement or a leisure activity.

Thus, the literature generated the proposal that volunteer motivation is the result of interactions with other stakeholders. Since volunteers in museums and heritage visitor attractions are increasingly involved in front of house activities, interaction between volunteers and visitors is presented as the most significant interaction. The alternative proposal is that volunteers are primarily pro-social in their motivation, that is, they are foremost motivated by their desire to help the organisation and do something worthwhile.

Three alternative models for this interaction are proposed: the service encounter, derived from the economic paradigm; the host-guest encounter, derived from the leisure paradigm, and peer tutoring, also derived from the leisure paradigm. These three models will reveal not only the primary motivation of volunteers but will also show whether volunteering is considered to be unpaid work or a leisure activity.

## **Chapter 4: Methodology**

### **4.1 Introduction**

The previous chapters have established the context of this research and identified both gaps in current knowledge and theoretical constructs, which assist in filling these gaps. The literature review led to the proposition of an interaction model of volunteer motivation and a series of research questions detailed below. This chapter sets out the research design of the project to enable empirical investigation of these constructs.

### **4.2 Research Questions**

Chapter Three proposed two alternative propositions: that volunteers are motivated by social interaction, that is they are extrinsically motivated; and that volunteers are pro-socially motivated, that is their motivation is intrinsic. In particular, volunteers' interactions with visitors are considered to be the key motivation, since this group of volunteers is on the increase and their purpose is to interact. Thus, three models of volunteer-visitor interaction were proposed: the service encounter, the host-guest encounter and peer tutoring. These three models are set within the two paradigms of volunteering research: the economic model and the leisure model. Identifying the nature of volunteers' interaction with visitors will aid in establishing whether volunteering is a leisure activity or a substitute for work.

#### **I Volunteers are motivated by social interaction**

Research questions:

H1 Volunteers are motivated by social opportunities

H2 Volunteer and visitor interaction is a service encounter

H3 Volunteer and visitor interaction is a host-guest encounter

H4 Volunteer and visitor interaction is peer tutoring

H5 Volunteers are extrinsically motivated

#### **II Volunteers are pro-socially motivated**

Research questions:

H6 Volunteering is something worthwhile

H7 Volunteers are intrinsically motivated



### 4.3 The Nature of the Research Problem

Chapter Three documented that the weakness of much previous research on volunteer motivation was that studies simply generated lists of motives, with little attempt to advance theory. This was largely the result of studies based on quantitative postal questionnaires, which sought to maximise external validity. However, previous researchers have noted that motivation is a complex issue and demands more detailed questioning. Qualitative research has been described as:

“the studied use and collection of a variety of empirical material...that describe routine and problematic moments and meanings in individuals’ lives” (Denzin & Lincoln, 2000:3)

Therefore a qualitative approach was taken in this research, to enable the context of the voluntary activities to be examined, along with the responses of the volunteers themselves. Qualitative research offers a variety of methodologies. These include focus groups, case studies, one-to-one interviews, diaries, and participant and non-participant observation.

Focus groups are semi-structured group interviews. They typically consist of 4-12 respondents and an interviewer, who acts as a moderator and uses a list of open-ended questions and prompts to elicit discussion among the participants (Lee, 1999). Focus groups allow ideas to be explored and are a good method for generating theory, rather than testing theory, as the hypotheses in this study require. Moreover, the use of focus groups in this study would present practical problems. Since volunteers are already giving their time freely, it would be difficult to ask them to make an additional commitment by taking part in a focus group, since these could not take place while the volunteers were on duty.

However, the benefits of focus groups, as a means of generating and exploring themes for further investigation, were acknowledged in this study during the preliminary fieldwork phase, when the researcher attended two focus groups being run by the BAFM as part of their training and development project. This is discussed further below.

Yin's case study method is the second most cited qualitative method in published studies within the organizational sciences (Larsson & Lowendahl, 1996). A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context. It copes with a distinctive situation where there are many more variables of interest than data points and as a result relies on multiple sources of evidence, including documents, cultural and physical artefacts, direct observation and systematic interviewing, which enable researchers to triangulate their findings and build a three-dimensional picture of the situation under investigation (Hamel, 1993; Yin, 1994). Case studies are useful both for generating and testing theory and they are considered the best means for examining why and how contemporary, real-life phenomena occur, but where researchers have minimal control over conditions, i.e. they are the qualitative equivalent of an experiment (Lee, 1999). Case studies are also perceived to be less disruptive to an organisation than other methods, as individuals can be interviewed and documents collected without any noticeable impact on the day-to-day activities of the organisation (Lee, 1999). Therefore access may be more readily granted to the researcher.

One-to-one interviews are both a method employed by case study researchers and a stand-alone technique. There are three types of interview: structured, semi-structured and unstructured. Structured and semi-structured interviews are best for testing theoretical propositions, using questions and themes derived from theory, while unstructured (also known as conversational) interviews are better for generating theory (King, 1994; Lee, 1999). Structured interviews use a set of questions, with a predetermined sequence, which cannot be deviated from in case this leads to bias in the responses. However, structured interviews allow for a statistically valid analysis of the results and enable factual information to be elicited. With semi-structured interviews, the interviewer is free to pursue matters as circumstances dictate, while still having an overall theme and some predetermined questions.

Semi-structured interviews are the most commonly used form of interview in qualitative studies (Arksey & Knight, 1999), as they facilitate comparison between respondents and can include both factual and perceptual questions. Qualitative interviews are a method of uncovering the meanings, routines and behaviours that underpin individuals' lives and they are also a method of eliciting respondents' understandings of these, rather than focusing on the accuracy of their accounts (King, 1994; Arksey & Knight, 1999). Even

more so, interviews can help respondents articulate concepts, such as their feelings, which were previously only implicit. Since this study is concerned with articulating the meaning of volunteering to the participants, interviews are an appropriate method for this research.

As well as employing either a structured or an unstructured interview schedule, interviews can be conducted face-to-face, over the telephone or using the internet. Face-to-face interviews are more time-consuming than the other two methods, but they do allow for rapport to build between the respondent and the researcher, enabling more personal questions to be asked. In addition, respondents are more likely to spend longer answering questions in a face-to-face interview than over the telephone (Arksey & Knight, 1999). Moreover, in this study it would have been impractical to interview volunteers and visitors in the first instance over the telephone since this would have required prior sampling of both the volunteers and the visitors

Participant and non-participant observation are methods well placed for investigating interpersonal interaction, controversial phenomena, phenomena that are hidden from public view or phenomena which are not well understood (Lee, 1999). Both methods require that considerable trust exists between the observer and the organisation and people being observed. Both methods are also time-consuming and only allow a small number of cases to be studied (Silverman, 2001). Since one of the aims of this study is to maximise the external validity of the data, observation was not deemed an appropriate method. Moreover, Silverman believes that observation is best used for exploring social phenomenon, rather than testing theoretical propositions as in this study.

Non-participant observation is a commonly used method for gaining information about the way visitors use museums and their exhibits (Hein, 1998). Previous studies have used non-participant observation to examine the way visitors move about museums and the length of time they spend in front of each exhibit, as well as the way they interact with the exhibit (Freeman, 1989). Non-participant observation has also been used to investigate how visitors interact both with each other and with the exhibits (McManus, 1987 & 1988). In this study such observation would allow the researcher to observe actual interactions between volunteers and visitors, listening to what is said, how it is

spoken and observing the non-verbal interaction, such as body language, to provide a rounded picture. However, observation cannot tell us what people are thinking, how they feel (except by assumptions based on body language and verbal expression), nor deduce either the visitors' or the volunteers' motivations and perceived benefits gained from this interaction.

Observation can be combined with interviews, but this again raises problems. It would not be possible to interview the volunteers after each interaction to determine their response to it without interrupting their activities and disturbing their natural reactions to the visitors. The visitors could be interviewed when they arrived, though they would then be aware that they were being observed which may inhibit their actions (Gill & Johnson, 1991). If they were interviewed on exit, this would mean closely monitoring their entire visit, which could be extremely time-consuming and would limit the number of visitor responses, given that respondents recorded an average length of visit that was more than three hours across ten cases. Moreover, monitoring respondents' entire visit would have been particularly difficult at the larger sites, such as Fountains Abbey, where it would have been necessary to monitor respondents' moves over the whole estate, including perhaps a visit to the café.

While interviews do not enable the actual interactions themselves to be documented, they are an accepted method of questioning both volunteers and visitors about their attitudes and opinions (Hood, 1981; McIntosh, 1997; Smith, 1999), which were needed in order to address the hypotheses. Moreover, they allow a much greater number of responses to be collected both from the volunteers and the visitors. Inevitably a trade-off was required between a more in-depth study of volunteers' motives and opinions and a larger number of respondents.

Thus, a qualitative research design was considered necessary for investigating the hypotheses and, of the different methods available to the qualitative researcher, case studies seemed the most appropriate for answering the research questions. However, case studies offer a range of methodological tools. Face-to-face interviews were deemed the best dominant means for data collection. Yet, since case studies offer a range of opportunities for data collection and data types, documentary evidence was also included, to allow for triangulation of interview data and postal questionnaires were also

used to supplement the interviews. Case studies also enable both qualitative and quantitative data to be collected, where appropriate. Qualitative and quantitative methods are not exclusive and both types of data can combine to give a more rounded view (Miles & Huberman, 1994) and address different questions (Cassell & Symon, 1994; Mason, 1994; Silverman, 2001). Indeed qualitative researchers argue that ‘counting the countable’ adds rigour to their research (Cassell & Symon, 1994; Lee, 1999). The specific methodological tools used are detailed in section 4.5.

#### 4.4 The Research Process

Figure 4.1 outlines the research process used in this thesis, from identification of the research problem through to data analysis and Figure 4.2 sets out the case study protocol.

*Figure 4.1* The Research Process Flow Chart

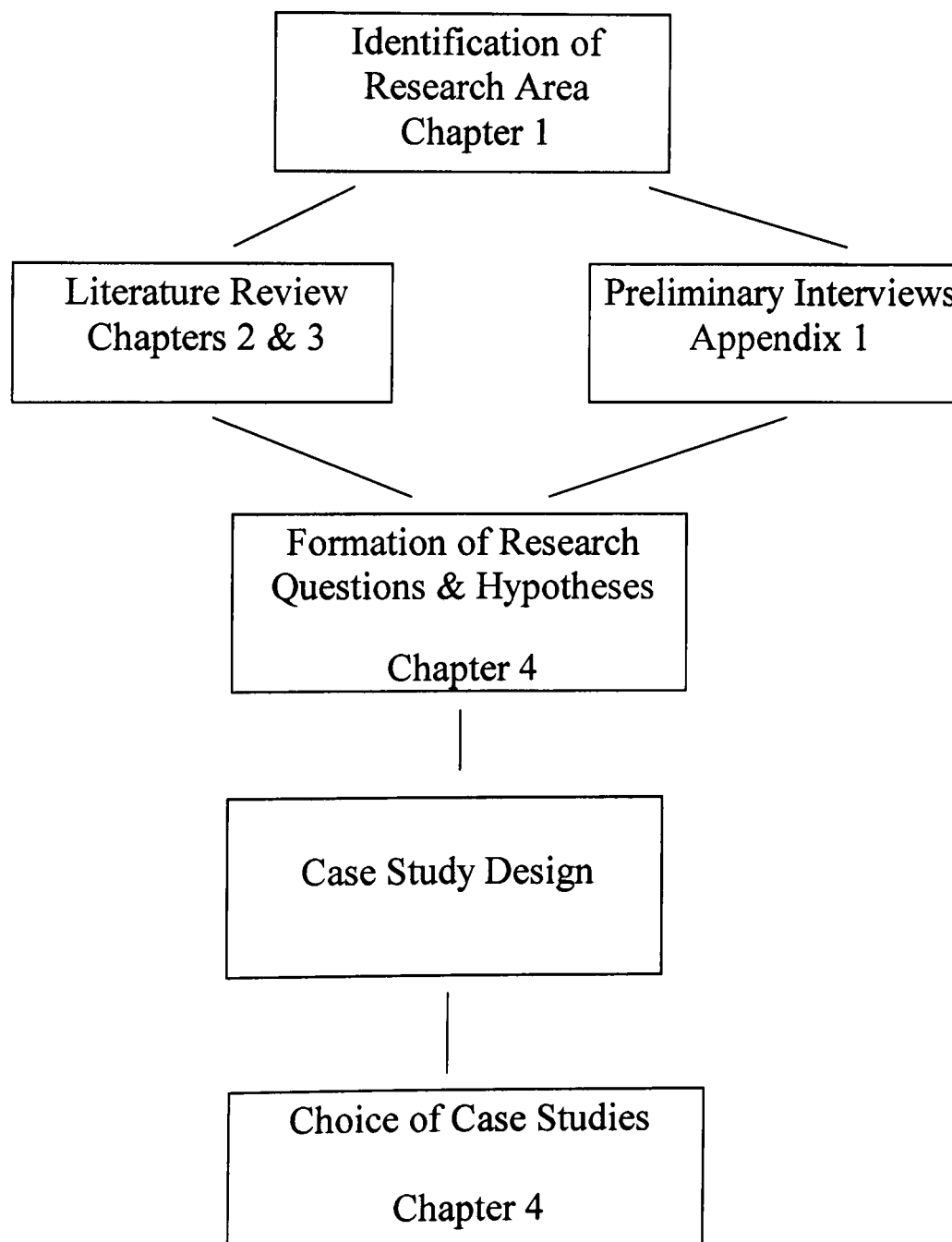
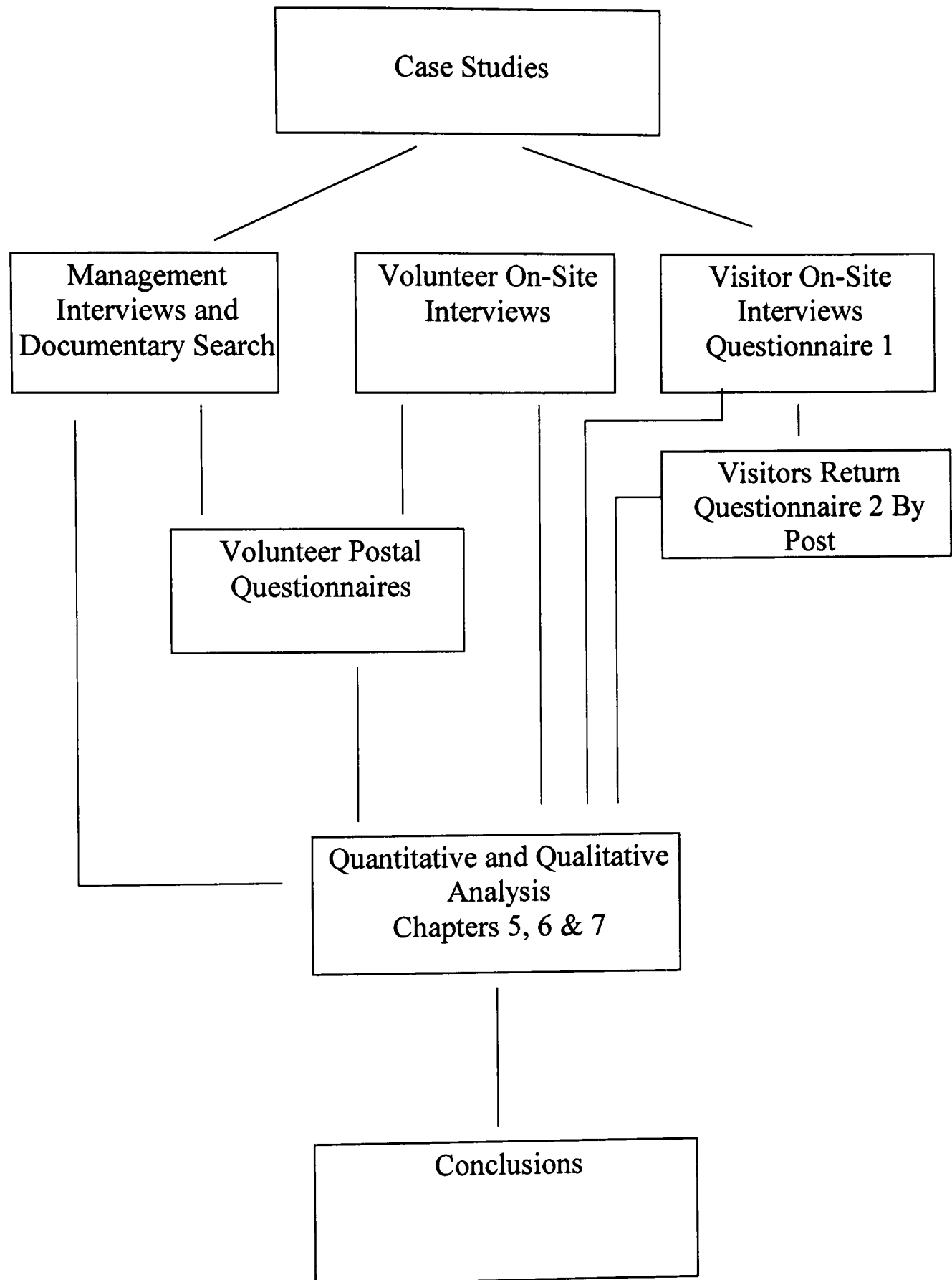


Figure 4.2 Case Study Protocol



#### 4.5 Methodological Tools

The overall research approach and the specific method to be utilised is discussed above. The actual research tools used in this study are described below.

##### Preliminary interviews

In order to validate the review of literature on the current state of volunteering and volunteer management in the heritage sector in Chapter Three and support the quantitative data from surveys, reported in Chapter Two, with qualitative data, a series of semi-structured interviews were conducted with key informants. These interviews were exploratory and a series of prompts, derived from the literature, rather than questions were used. The informants were chosen because of their overview of the situation. They included the Head of Research at the National Centre for Volunteering, the Volunteer Co-ordinator at Quarry Bank Mill – noted as an example of good practice by the Carnegie Trust UK, the Professional Development Manager for the Yorkshire Museums Council and a representative from the then Museums Training Institute (now CHNTO). These interviews supported the model for professional volunteer management, as presented in the literature and its adoption within organisations in the UK. They also noted the proportion of retired volunteers and that the volunteers varied demographically across different locations. A summary of the interviews is presented in Appendix 1.

The review of literature pertaining to the current debate surrounding volunteer management and motivation was further supported by the researcher's attendance at two focus groups run by the BAFM as part of their training and development project. Focus groups were held across the country for volunteer managers and coordinators to air their views. The researcher attended one focus group in York and one in London, while a colleague attended and transcribed a focus group in Crich, Derbyshire, thus gaining an idea of geographical spread. The focus group discussions were taken up for a large part by a presentation about the BAFM project. However, participants commented on the problems of introducing a *professional* management approach and noted the high proportion of older, retired volunteers. A summary of attendance and key points raised at the York and London focus groups is in Appendix 2.

### Case studies

The research questions required a qualitative approach. Since the management style adopted by each individual organisation was expected to have an impact on the volunteers' motivation, in the context of the economic or leisure paradigm, the volunteers needed to be examined within their organisation. Thus a case study methodology was deemed to be the most likely means of yielding meaningful data to address the hypotheses. As noted above, case studies offer the researcher a range of data sources and types.

### Interviews

Yin states that interviews are an essential source of information in a case study (Yin, 1994). The research questions required that three groups of people needed to be interviewed: managers, volunteers and visitors. Managers were interviewed to establish the history of the volunteer programme and current management style. Volunteers needed to be interviewed since they are the focus of this study and visitors needed to be interviewed, in order to gain their views on the volunteer encounter. Gremler and Gwinner note that in order to investigate the service encounter both participants need to be questioned (Gremler & Gwinner, 2000), and this has also been the case with studies of hosts and guests and peer tutoring.

Face-to-face semi-structured interviews were chosen as the most appropriate means of data collection. Face-to-face interviews enable development of rapport between interviewer and interviewee, they can increase the response rate and, in particular, they enable the interviewer to explain questions not understood or to query interesting answers. Moreover, the data are collected in the natural setting and the subject's cooperation is gained, allowing the researcher to check details at a later date (Healey & Rawlinson, 1993).

Semi-structured interviews seek to combine the benefits of structured and unstructured interviews. A larger sample can be obtained than with an unstructured interview but the interviewer can deviate where appropriate to query further interesting responses (Arksey & Knight, 1999). However, the unstructured and open questions included in these interviews, makes data analysis more complex and this is discussed in Chapter 5.



### Documentary evidence

The interviews were supplemented by documentary evidence including where possible volunteer policies and handbooks, surveys of volunteers and visitor surveys. Documentary evidence also included information on the organisation's web site. The documentary evidence varied from case to case and is summarised in Chapter 5. These data were used to triangulate the interview responses and to develop a greater understanding of the individual case studies.

### Postal Questionnaires

The BAFM survey, documented in Chapter 2, shows that volunteers do not attend every day (BAFM, 1998). Since the researcher was only able to visit the case study sites on a finite number of occasions there were a substantial number of volunteers who she was not able to interview face-to-face. Thus, the interviews were supplemented with a postal questionnaire distributed to the volunteers via their manager, although a self-completion questionnaire was enclosed so that the respondents could post the questionnaire directly back to the researcher. Clearly, this gave rise to the possibility of gate-keeping by the managers, as they could choose which volunteers were given questionnaires. Moreover, the application of postal questionnaires had additional limitations. Postal questionnaires tend to have lower response rates than face-to-face interviews and neither researcher nor respondents can ask for clarification. However, the postal questionnaire responses could then be compared to the face-to-face interviews to assess their validity. Both methods yielded similar responses, although the interviews produced richer data.

## **4.6 Study Population**

The heritage sector has already been deduced as a meaningful sector for studying volunteer motivation. However, there is no accepted definition of what the sector may or may not include. When the British Association of Friends of Museums designed their survey of volunteering, reported in Chapter Two, they expressed disbelief that there was no national database of heritage-related organisations and attractions (BAFM, 1998). Previous definitions include the heritage web (Davies & Gee, 1993), which compared museums to libraries and botanical databases, and segmenting museums and heritage visitor attractions by governing body or subject. Swarbrooke classifies attractions into: natural; man-made, but not originally designed primarily to attract visitors; man-made and purpose built to attract tourists; and special events (Swarbrooke, 1995). Drummond

expands these approaches by noting that heritage visitor attractions can be both indoor and outdoor, manmade or natural, site or event-based and nodal or linear (Drummond, 2001). None of these approaches has a particular relevance to a study of volunteers, since they may be involved in a diverse range of museums. Rather than try to unravel the definitional complexities of the sector, a function-based segmentation approach to the heritage sector has been adopted for this research. This segmentation is presented in full in **Table 4.1**. The segmentation was developed through a literature review and a series of telephone interviews to ascertain which types of organisations involved volunteers in which roles.

**Table 4.1 Heritage sector segmentation**

<b>Type of Attraction</b>	<b>Function of Attraction</b>	<b>All Staff</b>	<b>Paid Roles</b>	<b>Voluntary Roles</b>	<b>Examples</b>	<b>Relevant Organisations</b>
National Trust Properties	Protect and preserve for the nation	Conservators Education Garden Staff House Stewards Managers Park Staff Reception Retail/catering Visitor Services	Catering/retail Education Housekeeping Managers Reception Staff Visitor Services Volunteer Co-ordinator	Events and education House stewards, Park and Garden wardens, Stewards	Fountains Abbey Knole Kinver Rock Houses	National Trust
Cathedrals and Historic Places of Worship	Diocesan seat of bishop and centre of Christian worship and mission	Bell-ringers Canons Chapter Clerk Choristers Churchwardens Organist Provost Retail/refreshments Servers Stewards Vergers	Canons Chapter Clerk Organist Provost Vergers	Bell-ringers Choristers Churchwardens Retail/refreshments Servers Stewards	Durham Cathedral Westminster Abbey York Minster	Cathedral Fabric Commission Historic Churches Preservation Trust
Public Country Houses, Castles and Abbeys	Conserve and open for the public	Custodian Assistant Custodian Guides Keeper	Custodian Assistant Custodian Guides Keeper	Work Placement Students	Addington Palace Kirkstall Abbey Temple Newsam	Local Authorities
Private Country Houses, Castles and Abbeys	Open for tax and grant aid purposes and to enable the family to keep living there.	Administration Catering/Retail Events/Games House Guides Gardeners Reception Staff	Administration Catering/Retail Cleaning Events/Games Gardeners House Guides	NADFAS Volunteers working in the library	Castle Howard Harewood House Windsor Castle	Historic Houses Association Historic Royal Palaces Agency

Steam Railways	Preserve and open steam railways	Cleaning Loco shed Management Sales/admin	Loco Shed Reception Operations Management Sales/Admin.	All management and other tasks	Keighley and Worth Valley Railway Severn Valley Railway	Railway Heritage Trust
Historic Buildings: mills, barns,	Preserve and open local buildings of historical interest.	All management roles Demonstrators Interpreters Reception Staff	Expert Advisors Management	All management roles Demonstrators Interpreters Reception Staff	Cranbrook Union Mill	English Heritage National Monuments Record Centre
Craft Centres	Demonstrate and sell crafts. Keep old crafts alive.	Demonstrators Sales	Demonstrators Sales	Demonstrators Sales		Crafts Council
Art Galleries	Collect and display works of art	Conservators Curators Education Marketing/developme nt Director/Admin. Wardens Retail	Curators Conservators Technicians Education Marketing/development Director/Admin. Wardens Retail	Development Admin. Press office Curatorial Gallery Teachers	Dulwich Picture Gallery Whitworth Gallery	Resource: the Council for Archives, Museums and Libraries
Archives	Collect, preserve and make available documents, books and other media	Admin. Archivists Conservators Curators Personnel Security Technicians	Admin. Archivists Conservators Curators Personnel Security Technicians	Work placements	National Sound Archive North West Film Archive	The Society of Archivists Resource: the Council for Archives, Museums and Libraries
Historic Libraries	Collect and make available documents and books	Admin Conservators Curators Librarians Retail Personnel Security	Admin Conservators Curatorial work, Guides Librarians Personnel Retail Security Technicians	Guides Curatorial Work	Bodleian Library British Library	Royal Commission on Historical Manuscripts

Open Air Museums	Collect and display buildings	Catering/retail Managers Marketing Reception Staff	Demonstrators Interpreters	Demonstrators Interpreters Reception Staff	Amberley Museum Avoncroft Museum of Buildings Yorkshire Sculpture Park	Association of Independent Museums
National Museums	Research and scholarship, educate the public	Managers Curators Exhibitions Technicians Conservators Attendants/security Retail/catering Researcher/archivist Clerical	Managers Curators Exhibitions Technicians Conservators Attendants/security Retail/catering Researcher/archivist Clerical	Stewards Guides Interpreters Academic Guides	British Museum Museum of Welsh Life National Railway Museum	Depart of Culture, Media and Sport; Resource: the Council for Archives, Museums and Libraries
Local Authority Museums	Provide service for local community	Attendants/security Clerical/Technicians Conservation Curators Documentation Exhibitions Guides/Stewards Managers Retail	Attendants/security Clerical/Technicians Conservation Curators Documentation Exhibitions Guides/Stewards Managers Retail	Documentation Work placement students (curatorial)	Croydon Museum Leeds City Museums	Local Authorities
Military Museums	Perpetuate the deeds of the regiment and educate the public	Cleaner Curator Museum development officer Receptionist	Cleaner Curator Museum development officer Receptionist	Volunteer general dogsbody	Durham Light Infantry Museum Royal Sussex Regiment Museum	Army Museums Ogilvy Trust
Registered Charitable Trust Independent Museums	Preserve and display collection to the public	Cataloguing Clerical Conference Curator Guides Guides Librarian	Cataloguing Clerical Conference Curator Guides Librarian	Cataloguing Guides Reception Retail/Catering	Amberley Museum Galleries of Justice Quarry Bank Mill	Association of Independent Museums

		Manager/Admin Marketing Reception Staff Retail/catering Visitor Service	Manager/Admin Marketing Reception Staff Retail/Catering Visitor Service			
Other Independent Museums	Preserve and open for the public	Cataloguing Clerical Conference Curator Guides Librarian Manager/Admin. Marketing Reception Staff Retail/catering Visitor services	Cataloguing Clerical Conference Curator Guides Librarian Manager/Admin. Marketing Reception Staff Retail/catering, Visitor services	Cataloguing Guides Reception Retail/Catering	Laurel and Hardy Museum Newark Air Museum	Association of Independent Museums
Transport Preservation Museums	Preserve and maintain for the public	Cataloguing Clerical Conservation Curators Demonstrators Guides Librarian Manager/Admin. Marketing Reception staff Retail/Catering Visitor services	Cataloguing Clerical Conservation Curators Guides Librarian Manager/Admin. Marketing Reception staff Retail/Catering Visitor services	Cataloguing Conservation Demonstrators Guides Reception staff Visitor services	British Commercial Vehicle Museum National Railway Museum National Tramways Museum	
Historic Parks and Gardens	Conserve and open for the public	Admin Gardeners Guides Stewards	Admin Gardeners Guides Stewards	Guides Stewards	Harlow Carr Garden Kew Gardens Rufford Abbey	Garden History Society Countryside Commission

Corporate Museums	Promote the company/product and be a leisure attraction	Managers Marketing Exhibitions Personnel Finance Reception staff retail/catering	Managers Marketing Exhibitions Personnel Finance Reception staff retail/catering	Work experience and student placements	Cadbury's World Guinness Museum Sellafield Visitor Centre	
University Museums	Display university collections and resource for students	Director Education Keeper Secretarial Technical support	Director Education Keeper Secretarial Technical support	Admin. Documentation Guides	Ashmolean Museum Fitzwilliam Museum Hatton Gallery	University Museums Group
Historic Landscapes and Battlefields	Conservation and Presentation to the Public				Bosworth Culloden	Cadw English Heritage Historic Scotland
Monuments	Preserve and open for the public	Cleaning Manager Publicity Reception Retail Security/Attendants	Cleaning Manager Publicity Reception Retail Security/Attendants		Maiden Castle Stonehenge West Kennet Long Barrow	Cadw English Heritage Historic Scotland Royal Commission on the Ancient and Historical Monuments
Ships	Preserve and present to the public	Cleaning Conservation Education Guides Manager Publicity Reception Retail	Cleaning Conservation Education Guides Manager Publicity Reception Retail	Guides	Cutty Sark SS Great Britain Mary Rose	Historic Ships Heritage Trust

#### 4.7 Sampling

A case study approach has been proposed as the most appropriate methodology for this study. Moreover, the diversity of the museums and heritage sector has also been noted. However, previous qualitative studies have focused on one case study (McIvor, 1996; Graham, 2000a) or a particular type of case study (Smith, 1999). Thus not only has previous research on volunteer management been limited by its quantitative nature, but qualitative studies have failed to take into account the diversity and so have limited external validity. This research aimed to bridge these gaps by adopting a case study approach but seeking to maximise external validity both in the number of volunteers across the case studies and with the choice of actual case studies.

Where relevant only one case study may be used as noted above, however, there is a strong case for multiple cases to avoid coincidence and multiple case studies make the conclusions from the overall study more compelling. Each subsequent case study should be carefully chosen so that it either predicts similar results and is therefore a literal replication, or because it produces contrasting results but for predictable reasons, that is a theoretical replication. Yin (1994) suggests 6-10 case studies as a suitable number, depending on the study questions, resources and the existence of possible cases. Moreover, a greater number of case studies increases the external validity and generalizability of the data (Huberman & Miles, 1998), which was a concern of this thesis. These detailed studies, at a number of different sites, are termed a meso-scale study by Richards (2001).

Sightseeing in the UK detailed that four types of heritage organisations involve large numbers of volunteers: cathedrals and churches, National Trust properties, open-air museums and preserved railways (Hanna, 1998). Telephone interviews revealed that of these four only three involved a significant proportion of volunteers in front-of-house roles. These three are National Trust properties, open-air museums and preserved railways. Cathedrals and churches include among their volunteers choristers, churchwardens and bell-ringers, rather than front-of-house activities to service the visitor. The three segments, which represent these three groups, were chosen from the **Table 4.1** above.



As a concern of the study was to increase external validity by acknowledging the diversity of the museums and heritage sector, three cases were chosen from each segment to represent the range within the segment. Thus variation in size, the number of volunteers, and the subject matter were sought. Geographical variance was also sought as previous studies of volunteers had been grounded in discrete geographical locations (Osborne, 1993; Walter, 1995; Graham, 2000a). A further consideration was to include case studies, which were likely to represent volunteering both managed within the economic paradigm and the leisure paradigm. Finally, case studies which had been involving volunteers for a length of time and those that had only recently begun to involve volunteers were sought, in order that both long term and recent volunteers were included in the study. This would enable a comparison of the motives of long-serving and recent volunteers.

The first case study chosen was Fountains Abbey, which presented itself as a natural choice. It is a World Heritage Site and accords some prestige because of this. It also involves the largest number of volunteers of any National Trust property in the UK, and is self-funding, therefore the voluntary input is crucial to its continued operation. Subsequent case studies involving volunteers were chosen to provide literal replication, although some differences were expected as the result of size (a larger volunteer programme might be more structured), subject matter (which has an impact on the gender make-up of volunteers (Mattingly, 1984; Holmes, 1999)) and geographical location (depending on the population in the area from which volunteers may be recruited).

The research plan identified two major constraints on the research: time and access. Time was a limiting factor as interviewing was limited to the visitor season, Easter to October. While some of the case studies are open all year round, others are not. In practice the case study interviews were all conducted between May and October 1998. Access was also a potential constraint as the choice of case studies was dependent on gaining allowed access to the museums and heritage attractions chosen for the study, their managers, volunteers and visitors. Gummesson documents the divergence between ideal research practice and the reality of conducting research with real people and organisations (Gummesson, 2000). All social research relies on the co-operation of either individuals or organisations or both, and in some cases it is not possible to

obtain data or to publish research based on the data once they are obtained, in order to maintain confidentiality. However, access was generously granted at each of the case studies approached, so the choice of case studies was not compromised. After the case studies were chosen, each of the managers was contacted by post. This letter was followed up with an initial site visit and interview with the manager, or relevant staff, to discuss the role of volunteers (for a copy of this letter please see Appendix 3).

In total, ten case study locations were selected for this research (i.e. the maximum from Yin's suggested range), drawing approximately one third of the sample from each of the segments noted above.

**Table 4.2 National Trust Properties**

Case	Location	Number of Volunteers	Volunteer Front-of-House Activities
Fountains Abbey and Studley Royal	North Yorkshire	250	Estate Wardens Guides Room Stewards Special Events
Knole †	Kent	100-150	Guides Room Stewards
Kinver Rock Houses	West Midlands	26	Room Stewards
Brodsworth Hall *	South Yorkshire	150	Room Stewards

† Selected for pilot study

\* An English Heritage site, please see note below.

Fountains Abbey, Knole and Kinver are all owned by the National Trust, an independent charity established by Act of Parliament in 1895. The National Trust estimate that there are 35, 000 volunteers working with the Trust each year (The National Trust, 1998). Moreover, the Trust is committed to working with volunteers as part of its National Strategic Plan, and introduced a new policy on volunteering in 1999 (National Trust, 1999). This policy states that the National Trust as an organisation is committed to the voluntary principle as it is one of the organisations

“greatest strengths”

and

“without their active participation, the organisation would be unable to prosper.” (National Trust, 1999)

The National Trust Policy on Volunteering covers all the points of good volunteer management practice, as set out in Figure 3.1. It clearly covers the purpose of volunteers, recruitment and selection, training and development, support and recognition and management and communication, including insurance. However, the National Trust policy states that the volunteer role is a “gift relationship” and that

“no enforceable obligation, contractual or otherwise can be imposed”

although there is a

“presumption of mutual support and reliability. Reciprocal expectations are acknowledged.”

The significance of Fountains Abbey has already been discussed. Knole, as a country house, represented the typical National Trust property, as the National Trust are known for their country house programme. In contrast Kinver Rock Houses is one of their more unusual properties, as a series of houses cut into the base of a rock. The volunteers are a self-managing group of local people and may be more likely to represent the leisure paradigm of volunteering than their colleagues, working alongside paid staff.

In addition, a further case study was chosen as a contrast to Knole. This was Brodsworth Hall, a country house publicly owned and managed by English Heritage, the government’s official advisory body on conservation of the historic environment. English Heritage is directly responsible for some 400 buildings in its care and is also a major source of funding and advice for other organisations. English Heritage do not usually involve volunteers at their properties but Brodsworth Hall had been planned with the involvement of volunteer room stewards, working alongside paid front-of-house staff, in mind. Brodsworth Hall was opened by English Heritage in 1995 and has since been voted English Heritage visitors’ favourite property as well as winning Best Overall Property in the 1997 NPI National Heritage Awards, an awards scheme for historic houses run by National Providence with the BBC Homes and Antiques Magazine.

**Table 4.3 Open Air Museums**

Case	Location	Number of Volunteers	Volunteer Front-of-House Activities
Amberley Museum	Sussex	220	Demonstrators Selling tickets
Avoncroft Museum of Buildings	West Midlands	100-150	Room Stewards Selling tickets, shop & restaurant
Yorkshire Sculpture Park †	West Yorkshire	25	Room Stewards

† Selected for pilot study

The three open-air museums chosen demonstrate diversity in size, geographical location and the number of volunteers. Amberley museum is the only open air museum involving more than 200 volunteers (Hanna, 1998). Moreover, both Amberley and Avoncroft began as all-volunteer museums, which have since introduced paid staff. As case studies they may reveal how volunteers have reacted to the introduction of a more structured management approach. In contrast, while the volunteers at the Yorkshire Sculpture Park work alongside paid staff and under their direction, they are all members of the separate Friends of the Yorkshire Sculpture Park and this may have some impact on their motivation.

**Table 4.4 Transport Preservation Museums**

Case	Location	Number of Volunteers	Volunteer Front-of-House Activities
Cutty Sark	London	24	Guides
National Railway Museum †	York	100	Demonstrators Guides Room Stewards
Severn Valley Railway	West Midlands	500	Demonstrators

† Selected for pilot study

Again the three case studies chosen represent variance in size and geographical location. The National Railway Museum is a public sector organisation, which introduced a very specific volunteer programme in negotiation with the union. The Cutty Sark and the Severn Valley Railway both have paid staff working alongside volunteers, but the Severn Valley Railway was started as a voluntary organisation, and like the open air museums above, has only since introduced paid staff.

#### Volunteers in front-of-house roles

The case studies revealed that volunteers worked in a range of front-of-house roles. These included selling tickets, working in the shop or the restaurant, giving guided tours to visitors, stewarding specific rooms and answering visitors' questions, and demonstrating how the exhibits worked. Volunteers also worked as estate wardens at Fountains Abbey and helped at special events at several of the case studies.

#### Sampling within the case studies

As has already been stated within each case study managers, volunteers and visitors needed to be interviewed. Managers were the first port of call for each case study and were interviewed face-to-face, and asked for documentary evidence. In each case study the overall site manager was interviewed except where there was a manager with specific responsibility for the volunteers, in which case they were interviewed.

Both volunteers and visitors were interviewed over three days at each case study. Since a feature of the research was to examine the significance of older volunteers (and as they were considered more likely to volunteer during the week), volunteers and visitors were interviewed over one weekend day and two weekdays at each case study. Volunteer respondents were randomly chosen to be interviewed towards the end of their shift – or afterwards in the case of guides - when they were considered to be less busy and would therefore have time to answer questions. As many volunteers as possible were interviewed on each day.

Initially visitors were to be interviewed after their visit and questioned about their interaction with volunteers. However, piloting, detailed below, revealed that visitors were more amenable to being interviewed on arrival at the museum or heritage visitor attraction, and were asked a few questions at the start of their visit and asked to fill in

a more detailed self-completion questionnaire afterwards. While the benefits of face-to-face interviews would be lost, piloting with exit interviews had yielded a low response rate and the focus of the study was on the volunteers, not the visitors. Visitors were selected randomly as they arrived at the museum or heritage visitor attraction and were asked if they would participate in the study, interviewed, then the next visitor, or group of visitors, were interviewed.

#### **4.8 Interview schedules**

While this was a qualitative study, a combination of closed and open questions were used generating both quantitative and qualitative data. The quantitative data related mostly to the nature of volunteer management and to the personal characteristics of the volunteers and visitors. The quantitative data allowed comparisons to be drawn with existing studies.

##### **Management interviews**

In order to aid generalisation above the case study level, managers were interviewed using the questionnaire from the 1998 repeat of the Mattingly study (Holmes, 1999). This provided greater context for their responses. However, while this led to a structured interview, respondents were encouraged to pursue particular lines of interest in case new ideas or concepts emerged. Respondents were not constrained by the interview schedule.

Questions 1-8 asked about the nature of the volunteer programme: what activities the volunteers did, how long volunteers had been involved and how the volunteer programme was integrated with the case study. These questions were designed to reveal information about the background of the volunteer programme and how it had developed. For example, has it developed on an ad hoc basis, over a number of years, or was it planned and established following the guidelines for a *professional* management approach. Questions 9-12 asked about the Friends group, and how it was related to the volunteers. Questions 13-16 asked about the 'cost' of involving volunteers, and particularly if their contribution had ever been assigned an economic value. Question 17 asked what extrinsic rewards were offered to volunteers, in order to address Hypothesis 5. Questions 19-34 asked more about the way volunteers are managed, including recruitment and training of volunteers, disciplinary procedures,

dismissal and insurance. These details were to enable comparison with McCurley and Lynch's model for *professional* volunteer management (McCurley & Lynch, 1998). Questions 35-40 asked about the characteristics of the volunteers, including age and level of educational attainment. Questions 41 and 42 asked about the benefits to the museum or heritage visitor attraction of involving volunteers and questions 43 and 44 asked managers about the benefits to the volunteers, in order to address Hypotheses 1-7. Question 45 asked the managers to define what they thought was meant by the term 'volunteer', in order to help set the context for the research and ensure that the definitions used by the researcher corresponded with the managers' understandings of volunteering. Questions 46-65 asked about the front-of-house role of the volunteers, how they interacted with the visitors and whether the organisation collected any feedback from the visitors. These last questions were designed to address Hypotheses 2, 3 and 4.

The aim of these questions was to establish how far a *professional* management approach had been adopted. The management interviews were recorded and transcribed to ensure accuracy in reporting and analysis. For a copy of the management interview schedule please see Appendix 4.

#### Volunteer interviews

As stated above, volunteers were interviewed on site both while on duty and during breaks. Interviewing volunteers on their days on site provided the best access to as many volunteers as possible. Because volunteers were interviewed while on duty a structured interview was used, which would also enable analysis and comparison across cases. Question 1 asked volunteers how long they had been volunteering at the case study and question 2 asked what had attracted them to volunteer, as the literature suggested that volunteers' motivations changed over time (Pearce, 1987; Ilsley, 1990). Questions 3-5 asked volunteers about their interest in heritage and their volunteer career, since careers are a feature of serious leisure (Stebbins, 1992). Question 6 and 7 asked about their expectations of volunteering, what benefits did they hope to gain from volunteering and whether these have been met or not. Questions 8-10 asked about the nature of their voluntary activities. Questions 11-15 asked about their interactions with visitors, in order to address Hypotheses 1-4. Questions 17-21 asked about the benefits and drawbacks of volunteering. Questions

22-27 asked about the way in which they were managed, to ascertain if a *professional* approach was used. The responses to these questions could then be compared with management responses and documentary evidence. Questions 28-32 asked for demographic information, so that the respondents' characteristics could be compared to volunteers in the surveys reported in Chapter Two and in order to compare the motivations of older, retired volunteers, with younger volunteers. Finally question 33 asked again about the volunteers' motivation.

A copy of the volunteer interview schedule is in Appendix 4. The volunteer interviews were recorded where possible and transcribed.

#### Visitor interviews

In order to investigate the nature of the interaction between volunteers and visitors, the visitor response was needed. The best way to investigate visitors is to research them on site during their visit. However, in order not to interfere with their visit the interview schedule was structured and kept short, since the length of the interview was likely to have an impact on the response rate. Piloting established that interviewing visitors at the start of their visit and giving them a self-completion questionnaire to fill in after their visit and return on the day or by post in a freepost envelope resulted in the best responses. Since it was impossible to predict whether visitors were likely to interact with the volunteers, as many visitor respondents as possible were sought.

On the entrance interview schedule questions 1-5 asked visitors generally about their visit as a means of building rapport between the respondent and the interviewer. Questions 6-9 asked about their visiting habits to establish if they were regular heritage consumers and therefore likely to know how to interact in encounters with volunteers (McCallum & Harrison, 1985). Questions 10-13 asked for basic demographic details so that the visitor could be compared with the volunteers. The theoretical concept of the host-guest encounter suggested that similarities and differences between the individuals involved would have a significant impact on the encounter. On the self-completion questionnaire, questions 1, 7-8, 11-12 asked about the overall visitor experience. Questions 2-5 and 15-16 focused on visitors' interactions with volunteers, in order to address Hypotheses 2, 3 and 4. Question 6



asked visitors if they had ever worked as a volunteer, as familiarity with the role would increase the likelihood of the visitor and volunteer *interlocking* in a service encounter (Czepiel, Solomon & Surprenant, 1985) and would reduce the cultural gap between participants in a host-guest encounter (Smith, 1992). Question 10 asked how long visitors had spent on their visit and questions 13 and 14 asked about future visiting intentions.

The visitor entrance interviews were not recorded as they were short and the questions were mostly closed. Copies of the visitor interview schedule and the self-completion questionnaire are in Appendix 4.

#### **4.9 Piloting**

Yin (1994) states the importance of choosing a pilot case study, and states that this is the final stage of preparation for the fieldwork. Moreover, the vital importance of piloting interview questions with their intended respondents is acknowledged (Oppenheim, 1992; Arksey & Knight, 1999).

The pilot case may be chosen for one of three reasons

- It is convenient geographically
- The informants are particularly helpful
- There are a large amount of data

Fountains Abbey was chosen to help design and pilot the case study protocol. Not only is it an interesting case in its own right as the estate involves the largest number of volunteers of any National Trust property and it is a World Heritage Site, but the staff were very keen to be involved in the study, and it was one of the closest case studies geographically, thus allowing for additional visits for piloting. The interviews were further piloted at the National Railway Museum and the Yorkshire Sculpture Park.

The pilot interviews with both managers and volunteers needed little alteration, particularly since they were conducted as face-to-face interviews and respondents' queries could be dealt with by the researcher at the time. However, the visitors preferred to answer questions on entry, rather than exit, as on entry the visitors had

more time and were more relaxed. This was a significant finding as visitor surveys have been typically administered on exit. It was also important to delay the visitors for as short a time as possible on entry, and piloting helped in paring down the entry questionnaire to include only the most essential questions. Open-ended qualitative questions were reserved for the questionnaire (Questionnaire C), which visitors took away with them, as they would be able to answer these at their leisure. Finally, it was observed that visitors rarely visit alone, therefore the questionnaire was modified so that the socio-demographic details of up to two of the group could be noted.

The postal questionnaire for the volunteers was adapted from the interview schedule for the face-to-face interviews, therefore the interviews were used as the piloting tool for the questionnaire.

#### **4.10 Chapter Summary**

This chapter has presented the research design selected to test the hypotheses. A predominantly qualitative case study approach based on face-to-face interviews (supported by questionnaires) was chosen. To capture the breadth of the heritage sector and to maximise the external validity of the study, ten organisations from three segments were selected for study. In addition three groups of respondents were identified for each organisation, managers, front-of-house volunteers and visitors. The design and piloting of the interview schedules and questionnaires for each of these respondent groups is also described.

The next chapter reports on the fieldwork, reviews the validity and reliability of the data collected and describes the data analysis.

## **Chapter 5: The Data**

### **5.1 Introduction**

Chapter three set out the hypotheses, the methodological approach, the data collection tools and the sampling process used in this research. This chapter reports on the data collected, who the respondents were, and what data were collected and examines the validity of these data. The means by which these data were analysed are discussed and the limitations of the research methodology are considered.

### **5.2 The data**

The case studies were designed to generate as much variability within the respondents as possible. Previous studies had revealed that variations could be expected due to the type of exhibit or collection and geographically (Mattingly, 1984; Walker, 1996; Holmes, 1999; Osborne, 1999). Moreover, a variation due to the size or the governing body of the case studies was also allowed for within the sampling frame. Table 5.1 lists all the interview and documentary data collected from managers at the ten case studies.

**Table 5.1 Management data collected from each case study**

	<b>Interviewees</b>	<b>Documents</b>
Fountains Abbey	Volunteer Coordinator Assistant volunteer coordinator	National Trust Policy on Volunteering Information for Volunteers booklet
Knole	Property manager Volunteer coordinator	National Trust Policy on Volunteering Visitor surveys
Kinver rock houses	Estate warden Site custodian	National Trust Policy on Volunteering History of the volunteers, written by the Volunteer Coordinator
Brodsworth Hall	Property manager	Volunteers in English Heritage: policy guidelines
Amberley Museum	Director	Volunteer training and development survey
Avoncroft Museum of Buildings	Director	Annual report 1997 Newsletter 1998
Yorkshire Sculpture Park	Volunteer coordinator Member of Executive of the Friends	No written material available
Cutty Sark	Visitor Services Manager	No written material available
National Railway Museum	Visitor Services Manager	Customer Charter Annual Report 1999-2000 Volunteer Agreement
Severn Valley Railway	Volunteer coordinator Commercial Manager	Visitor Survey 1995 Newsletter 1998

A total of 222 interviews and postal responses were collected from the volunteers, thus increasing the external validity of the study. The overall response rate and the number of responses collected within each individual case study are presented in Table 5.2.

**Table 5.2 Volunteer Response Rate by Case Study**

<b>Case</b>	<b>Interviews (Number)</b>	<b>Postal Survey (Number and % respondents)</b>
Fountains Abbey	12	12/30 = 40%
Kinver Edge	3	12/23 = 52%
Knole	10	23/30 = 77%
Brodsworth Hall	13	17/30 = 57%
<b>Total Historic Sites</b>	<b>37</b>	<b>76/113 = 67%</b>
Amberley Museum	10	See Note Below
Avoncroft Museum of Buildings	11	10/30 = 33%
Yorkshire Sculpture Park	3	6/21 = 29%
<b>Total Open-air Museums</b>	<b>23</b>	<b>16/51 = 31%</b>
Cutty Sark	6	10/18 = 56%
National Railway Museum	11	16/30 = 53%
Severn Valley Railway	6	13/30 = 46%
<b>Total Transport Preservation</b>	<b>23</b>	<b>49/78 = 63%</b>
<b>Total (all cases)</b>	<b>83</b>	<b>139/242 = 57%</b>

Amberley Museum undertook a volunteer research and development project during 1998, which involved a postal survey to the volunteers. The data from this study was used to support the interviews, as a further survey was thought likely to generate a low response rate from over-surveyed volunteers.

In almost all cases the response rate to the interviews was 100%. That is all respondents, who were approached, agreed to be interviewed. In one case, at Fountains Abbey, a tour guide did not have time to answer all the questions before beginning their tour and thus their responses were not included in the analysis or the figures given in Table 5.2. Three factors were likely to have contributed to the high interview response rate. Firstly the research was supported by the organisation where the volunteers were helping. Since they were willing to give their time for the organisation, they were also likely to support other ventures, which they perceived would benefit the organisation. Response rates are known to be higher for studies, which are of interest to the respondents (Oppenheim, 1992). A second factor was the largely captive nature of the respondents' activities. Since the volunteers were typically stationed in one room for their shift, the interviewer was able to 'capture' their attention and co-operation. A final factor, which may have contributed to the high response rate, was that the interviewer benefited from the respondents desire for social interaction. However, while almost all respondents agreed

to the interview, some respondents were hostile towards the interviewer, this is discussed further in 5.5.

The postal response rates vary between 29% at the Yorkshire Sculpture Park and 77% at Knole. Oppenheim notes that any response rate of 30% or higher is a good response rate (Oppenheim, 1992). Therefore only the Yorkshire Sculpture Park has a slightly marginal response rate and those at the other case studies are good, which helps to reinforce the conclusion validity of this research.

A total of 509 visitors were interviewed at the ten case studies, again in order to maximise external validity. 253 visitors returned the second questionnaire, either by post in a pre-paid envelope, or in person at the end of their visit. This gives a response rate of 49.7%, which is acknowledged as good (Oppenheim, 1992).

**Table 5.3 Visitor Response Rate by Case Study**

<b>Case</b>	<b>No of Visitors Interviewed (Response rate in %)</b>	<b>No Returning Second Questionnaire</b>
Fountains Abbey	59/75 = 77%	36/59 = 66%
Kinver Edge	22/28 = 79%	9/22 = 41%
Knole	75/92 = 82%	41/75 = 55%
Brodsworth Hall	48/54 = 89%	27/48 = 56%
<b>Total Historic Sites</b>	<b>204/249 = 82%</b>	<b>113/204 = 55%</b>
Amberley Museum	72/81 = 89%	32/72 = 44%
Avoncroft Museum of Buildings	54/65 = 83%	31/54 = 57%
Yorkshire Sculpture Park	38/47 = 81%	24/38 = 63%
<b>Total Open-air Museums</b>	<b>145/193 = 75%</b>	<b>87/145 = 60%</b>
Cutty Sark	75/92 = 82%	25/75 = 33%
National Railway Museum	58/72 = 81%	18/58 = 31%
Severn Valley Railway	27/37 = 73%	10/27 = 37%
<b>Total Transport Preservation</b>	<b>160/201 = 80%</b>	<b>53/160 = 33%</b>
<b>Total (all cases)</b>	<b>509/643 = 79%</b>	<b>253/509 = 50%</b>

The response rates for visitor interviews is lower than that for volunteers, but this is still a high response rate, which increases the validity of the data. This is likely to be because the visitors were less interested in the research, since they were not a part of the organisation. However, a review of response rates for face-to-face interviews, found that 81.7% was the mean response rate (Yu & Cooper, 1983), thus the interview response

rates for the visitors are acceptable. The postal response rates were lower for the three transport preservation case studies. The sample of visitors to the Cutty Sark includes many overseas visitors, which may explain the lower response rate at this case study. However, it is unclear what may have contributed to a lower response rate at the two other transport preservation cases, although the response are still reasonable for a postal questionnaire (Oppenheim, 1992).

### 5.3 The case studies

The ten case studies were chosen after careful sampling, with reference to previous research and with consideration for maximising external validity. The case studies were selected in order to vary in the number of volunteers involved, geographical location, subject matter and governing body. Specifically, the literature suggests gender variation based on subject matter (Mattingly, 1984; Holmes, 1999) and previous studies had been rooted in geographic locations (Osborne, 1993; Walter, 1995). However, how far did the ten case studies meet expectations? Since Fountains Abbey was used as the pilot case study, a fair amount was known already about the volunteer programme and there were no surprises. The programme conformed to National Trust policy, for example in terms of recompense offered volunteers:

“Discounts in the shop if you’ve done enough and free tickets for evening events” (Volunteer)

And

“10p a mile and Christmas cards from the estate’s people” (Volunteer)

Knole, however, proved to be even more interesting than might have been expected. Knole has a volunteer recruitment problem. Many are elderly, over 80 or even 90, and in spite of a proactive recruitment campaign there is still a shortage, which increases the time demands on existing volunteers. There are approximately 120 current volunteers, and the Property Manager and Volunteer Co-ordinators at Knole would ideally like another 80. Currently there is a mixture of long-serving and newly recruited volunteers. Paid guides were used from when the National Trust first took over in 1947 until only a few years ago (The Volunteer Co-ordinators are unsure exactly when the change took place). Volunteer room stewards were initially introduced for security purposes and they had to refer to the guides for information about the house when answering visitor questions. This attitude is still found among the respondents, although this was the exception.

“Although we are there for mainly security purposes we can also answer questions about the rooms and house.” (Volunteer)

All the volunteers bar one described themselves as ‘room stewards’. Only one long-serving volunteer stated that

“I’m a guide, not a room steward. There is a difference.” (Volunteer)

There is clearly conflict between the managers and the long-serving volunteers.

In contrast, Kinver is a tiny property on the edge of National Trust region, both physically and psychologically. The Estate Manager stated that Kinver Edge has never been a priority of the Trust in that region because it is one of the smaller properties, on the edge of the region. As the volunteers have designed the interpretation themselves, it may not be what the Trust would want, but it is the only way the rock houses would have been opened and interpreted,

“We actually got the place opened and run and the information across...You’ve got to keep bringing it down to money. We don’t charge for access, there’s no admission charge...We couldn’t afford to open it any other way.” (Estate Warden)

Brodsworth Hall provided a contrast, both as an English Heritage property which involves volunteers and also as an organisation which had only recently opened, therefore the volunteers were likely to remember their initial motivations more clearly than perhaps longer serving volunteers elsewhere. Unlike the National Trust properties, at Brodsworth Hall there are also paid staff working alongside volunteers, who are responsible for security and admissions. A clear distinction has been made between staff and volunteers, as required by English Heritage’s volunteer policy, with staff undertaking all the formal operational procedures: security, admissions, ticket checking and staffing the café and the shop. Staff wear a uniform, and volunteers stewarding the rooms wear their own clothes and a volunteer badge. This has developed a good working relationship between staff and volunteers as each group’s responsibilities are explicitly laid out. Staff only act as stewards to cover volunteers on their breaks and volunteers do not handle any money.

Amberley Museum, the first of the open-air museums, was in a state of managerial flux at the time of the study. Amberley was pursuing a volunteer training and development programme, funded by the Carnegie Trust UK, sparked mainly by the shortage in new



volunteers, especially those with specialist skills. While the management of the volunteers was likely to change as a result of this project, recent communication with the Museum Director (January, 2002) revealed that the main recommendation of this project was to employ a Volunteer Co-ordinator, which the museum cannot afford to do.

Both Amberley Museum and Avoncroft Museum of Buildings began life with one paid museum director and a team of volunteers. At both museums volunteers were initially involved in putting together the exhibits and only over the years has their role become more visitor-oriented. However, at Amberley volunteers still restore the exhibits, while at Avoncroft volunteers are only involved in front-of-house activities. The Museum Director comments on their evolved role from running the museum, to acting as information stewards as:

“I know one of two museums where it has been a problem. The volunteers started the museum off and over the years it’s become more commercial. The volunteers feel that they’ve been pushed to the periphery. If anything we are going round full circle as we are trying to use volunteers more and more, purely for financial reasons.”

In addition, an unusual situation has evolved at Avoncroft where a number of the volunteers are paid an allowance of approximately £1.10 an hour. Although this is a payment, it is a very small allowance and well below the national minimum wage.

“I get £1.10 an hour, but really you work for free.” (Volunteer)

Avoncroft was the only case study with this situation and this makes it particularly interesting. Are ‘paid’ volunteers motivated differently from ‘unpaid’?

The Yorkshire Sculpture Park had been chosen as a small open-air museum, in terms of the numbers of volunteers involved and because the subject matter, art, might attract different volunteers. At a basic level this was the case, as the majority of respondents at both Amberley and Avoncroft were male, while at the Yorkshire Sculpture Park there was an even number of male and female respondents. Thus, this would help to redress the gender imbalance at the two other open-air museums, should gender be found to have an impact on motivation.

The three transport preservation museums also proved to represent a cross section of respondents. At the Cutty Sark, half the respondents had begun their involvement as part of a placement for an NVQ in guiding and interpretation, therefore work experience

seekers' motivation could be compared with that of other volunteers. The National Railway Museum, like Brodsworth Hall, the only other public sector case study, had strict guidelines for volunteer involvement, which had been agreed with the trade union. This contrasted with case studies such as Amberley Museum, where volunteers carry out a wide range of tasks. Moreover, as the next chapter will document, the National Railway Museum provided the strictest example of a *professional* volunteer management programme out of all the case studies.

Finally the Severn Valley Railway was chosen as an organisation involving a huge number of volunteers and also as the only example of a preserved steam railway, which involves large numbers of volunteers across the UK. The Severn Valley Railway had begun as an all-volunteer railway, but as with Amberley and Avoncroft, paid staff had been brought in to run the business side of the organisation.

The above summary demonstrates that the sampling procedure did elicit a wide range of organisations, both in number of volunteers, subject matter, sector (public or voluntary) and geography. Moreover, each individual case study introduced new contexts to the study, for example, the paid volunteers at Avoncroft Museum of Buildings and the work experience seekers at the Cutty Sark, which mean that additional variables can be included within the analysis of volunteers' motivations.

#### **5.4 The validity of the data**

External validity is the extent to which the observations and conclusions derived from a sample can be generalised to the wider population. As stated in Chapter 4, this study is particularly concerned with maximising external validity, as this has been a weakness in previous research with volunteers. Both the large numbers of volunteer and visitor respondents help to contribute to this but in addition, the large number of case studies further enhances external validity (Yin, 1994; Miles & Huberman, 1998). High external validity also enables valid statistical tests to be applied to the countable data in a study, thus increasing the overall validity of the conclusions.

Since this thesis is not seeking to establish a causal link, internal validity was limited in exchange for the focus on external validity. However, internal validity can be reinforced through the analysis, by seeking alternative explanations (Miles & Huberman, 1998).

Construct validity was another major concern of this thesis, particularly as interviews were the primary research tool and respondents may have wanted to please the researcher or give positive images of themselves. Triangulation of data types and data sources is the most common method of addressing these concerns (Arksey & Knight, 1999). Management data was drawn from the managers, where possible more than one respondent, documentary evidence, where available, and through questions to the volunteers. The interview design was used to try and minimise the dangers of such bias entering the data on the volunteers, by asking volunteers several times about their motivations during the course of the interview (Arksey & Knight, 1999). Construct validity is also increased by the accurate recording of data, which enables a clear chain of evidence back to the original source. This has been facilitated in this thesis by clear and accurate reporting of the data analysis procedures used, below. Moreover, Yin recommends the use of pattern matching in demonstrating construct validity, by comparing the pattern of agreement between the predicted and empirical patterns (Yin, 1994). Indeed Arksey and Knight note that the validity of an interview-based study is enhanced by drawing questions explicitly from the literature and pilot work, careful sampling and by acknowledging the impact of the interviewer on the respondents (Arksey & Knight, 1999).

Conclusion validity is concerned with data analysis. The data analysis is discussed below. However, before analysis can begin, the researcher must review whether their data is worth analysing. In particular, whether there is sufficient variation within the data so that alternative expectations can be sought, as required by construct validity. The case studies generated respondents with a variety of lengths of service, from less than 6 months to over 10 years, so that variations between motivation and length of time volunteering could be examined. Across the ten case studies, 60% of respondents were male and 40% were female. However, this varied from case to case, with 95% of respondents male at the National Railway Museum and 72% female at Brodsworth Hall. These gender differences reflect the responses from Mattingly's 1984 survey and the 1998 repeated survey (Holmes, 1998), with the gender of volunteers reflecting the subject matter of the site or museum collection.

The volunteers who were interviewed or surveyed were predominantly older, with only 7% aged less than 45 years. This corresponds with data from the BAFM and National Trust surveys, reported in Chapter 2. 66% of respondents to the BAFM survey were aged 60 years or older, which corresponds to the 63% of volunteers across the ten case studies were aged 60 years and above. 82% of respondents to the National Trust survey described themselves as permanently retired, compared to 74% of respondents across the ten case studies. Across the three National Trust sites, the average was slightly higher at 76% and commented on by the Volunteer Coordinator at Fountains Abbey, who noted that

“...it’s easier to get retired people for during the week”

While all age groups, from 18-24 years, were represented within the sample, so that questions about a the relationship between age and motivation could be examined, the large proportion of older, retired volunteers (as expected in this research) meant that only a small proportion of younger volunteers were interviewed during this study.

Triangulation of data sources and data types is also a means of increasing conclusion validity (Miles & Huberman, 1994). Individuals’ and documents’ accounts of phenomena are not taken at face value and inconsistencies can be revealed. In this study triangulation was achieved by collecting managers, volunteers and visitors’ accounts, supplementing this where possible with documentary evidence and by design of the interview schedules. In actuality, while not all verbal accounts corresponded with the documentary evidence, managers and volunteers’ responses corroborated each other. For example, National Trust policy states that volunteers should be paid travel expenses as mileage, yet at Knole they only received a flat £2 payment per shift. The General Manager, the Volunteer Coordinator and the volunteer respondents all stated this:

“£2 towards expenses, this has been the same for 11 years” (Volunteer)

“All you get is £2 for travel, also a volunteer’s card and a discount in the shops and an end of term party” (Volunteer)

In other cases, the volunteer respondents elaborated on management statements, for example about training. There were no cases where documentary evidence, management data and volunteer respondents completely disagreed.

Conclusion validity is also ensured through writing a thorough account of the research process, to enable readers to establish a clear chain of evidence from the conclusions back to the data (Arksey & Knight, 1999).

### **5.5 Data Analysis**

The main techniques for analysing qualitative data involve various methods of sorting, organising and indexing data (Lee, 1999). Lee further notes that this is a creative, rather than a mechanical process. However, such qualitative analysis techniques have often been criticised for undermining the validity of the study. Either researchers have not been transparent or honest enough in describing their methods, or they have subjectively searched for patterns and meanings among the data, neither of which allows for replicability. In order to avoid these criticisms, researchers have urged each other to 'count the countable', by both analysing quantitative data statistically, as above, and by applying quantitative techniques to qualitative data (Lee, 1999).

While the research strategy was fundamentally qualitative, quantitative data were also collected. Traditionally researchers have argued that both methodological approaches stand at opposite ends of the epistemological spectrum (Gill & Johnson, 1991; Denzin & Lincoln, 2000; Silverman, 2001). However, qualitative researchers are now aware of the benefits of including quantitative data, where appropriate, in a qualitative study (Cassell & Symon, 1994; Mason, 1994; Miles & Huberman, 1994). The interview schedule employed in this research integrated quantitative and qualitative data throughout, as an holistic picture of each case study and each volunteer was needed. Quantitative data on length of service, age and employment status were needed in order to investigate the research propositions.

The means employed to analyse the quantitative data were different from those used for the qualitative data and these are explained separately, followed by the method used for cross-data analysis.

#### **Management Interviews**

Data from the management interviews was transcribed and compared with documentary evidence for triangulation. The data for each case were then indexed against McCurley and Lynch's model for professional volunteer management (Figure 3.1, Chapter 3). This

is a form of pattern-matching, one of the dominant forms of case study analysis (Yin, 1994), whereby data are compared to a pattern generated from the literature (Lee, 1999). As noted above, pattern matching can also help demonstrate the construct validity of a study. The data were further triangulated by comparison with the volunteers' responses. The management data are presented case by case in tabular form in order to set the context for each case study. However, inconsistencies between the different data sources are noted and the data are compared with the surveys reported in Chapter Two.

#### Volunteer Interviews

The data from the volunteer interviews is a combination of quantitative and qualitative data, and both types of data were analysed separately. The quantitative data were numerically coded and entered into SPSS, the standard statistical analysis computer programme (Bryman & Cramer, 1997). The data were all either nominal or ordinal, and frequencies and cross tabulations were carried out and tested with the chi-square test of statistical significance where appropriate.

The qualitative responses for each case study were indexed under the interview question headings (Arksey & Knight, 1999). Content analysis was then carried out, using the dictionary in Table 5.4. Content analysis is a form of pattern matching (Weber, 1990). Pattern matching is a dominant method of analysing case study data (Yin, 1994) and seeks to compare actual patterns within the data with theoretical patterns generated by the literature (Lee, 1999). Content analysis examines textual forms of human communication, which is a fundamental part of social interaction (Weber, 1990) and is therefore a meaningful means of analysis for this study. The use of content analysis enables subsequent researchers to ascertain the reliability and validity of the analysis since key words are actually counted (King, 1994; Silverman, 2001).

Content analysis is a quantitative way of dealing with qualitative text, whether documentary evidence or interview responses (Weber, 1990; Ryan & Bernard, 2000; Silverman, 2001). The conceptual framework of a study is used to identify key words and concepts for categorising textual data. Within qualitative studies, researchers often refer to a process called template analysis (King, 1998; Miles & Huberman, 1994). Template analysis differs from content analysis, in that keywords and concepts are allowed to arise from the data. They are not entirely prescribed from the conceptual

framework. However, the researcher can best visualise the differences between the two approaches by imagining a linear scale, with pure content analysis at one end and pure template analysis at the other (King, 1998). Both approaches are primarily concerned with categorising data according to a dictionary or template of key words and concepts, which will address the research questions and both methods note the frequency of the occurrence of these key words (King, 1998).

Pure content analysis is where there is no variation from the prescribed dictionary and the frequency of key word citations is the most important consideration, with little reference to the original texts on which the analysis is based (Weber, 1990). Pure template analysis derives the codebook entirely from the data collection process and relies on presenting significant quotations to illustrate the results (King, 1998). The mode of analysis used in this study falls somewhere along this scale. The content dictionary has largely been derived from the literature, but new categories arising from the data are also included. While the frequency of key word citations is presented quantitatively in tabular form, this is not divorced from the interview responses, which add context and richness to the results (Miles & Huberman, 1994). To avoid confusion, the mode of analysis will be referred to as content analysis throughout this study.

The theoretical propositions are represented in this study by the keywords and concepts in the content dictionary (Weber, 1990; Ryan & Bernard, 2000), which were derived from the literature (King, 1994) and then a key word search was carried out within the data, using Word for Windows. In particular the key words were derived from Hood's definition of enjoyable leisure, Box 3.2 (Hood, 1983), Stebbins' definition of serious leisure, Box 3.4 (Stebbins, 1992), words reflecting the three types of interaction, and words directly relating to the hypotheses. The key words related to enjoyable leisure are: *challenge or new experience, comfortable in surroundings, enjoyment and recreation, doing something of value or something worthwhile, social opportunities and benefits and knowledge, learning and skills*. The key words related to serious leisure are: *belongingness, involved, identify and team, career, colleagues or like-minded people, enhancement of self-image, knowledge, learning and skills, self-development and social opportunities and benefits*. Clearly there is an overlap between enjoyable leisure and serious leisure. However, serious leisure varies from enjoyable leisure, as noted in Figure 3.2 and includes elements that are not in themselves enjoyable, such as

the need to persevere. The antithesis of leisure volunteering is represented by any words or phrases in the volunteers' responses, which referred to *work, job or obligation*.

Chapter Three also addressed the issue of older volunteers and the relationship between volunteering and reengagement theory and activity theory. This is represented in the content dictionary by the key words *keeping active in retirement*. The other key words in the content dictionary refer directly to the hypotheses. *Colleagues; like-minded people, interaction: enjoyment; welcome; share learning; service and social opportunities and benefits* represent hypotheses 1-5; while *doing something of value or something worthwhile* represents hypotheses 6 and 7; and *subject interest* represents hypothesis 7.

As noted above, in addition to the content dictionary, key words and concepts were also sought from the data, a technique that is employed in compiling a code book for a template approach to the analysis of qualitative interviews, whereby categorisation of data is not exclusively prescribed by previous research or theory (King, 1998).

As stated above, the content analysis was initially carried out within each category, within each case and subsequently cross-case analysis was undertaken to ascertain if the theoretical generalisations can be at a cross-case level, and therefore the results may be generalisable to the wider heritage and voluntary sectors.



**Table 5.4 Content Dictionary for Analysis of Volunteer Interviews**

<b>Keyword or phrase</b>	<b>Theoretical Proposition</b>
Be active in retirement	Activity theory/reengagement theory
Belongingness; involved; identify; team	Serious leisure
Career	Serious leisure
Challenge; new experience	Enjoyable leisure
Colleagues; like-minded people	Serious leisure; Hypotheses 1-5
Comfortable; surroundings	Enjoyable leisure
Enhancement of self-image	Serious leisure
Enjoyment; recreation	Enjoyable leisure
Interaction: enjoyment; welcome; share learning; service	Hypotheses 1-5
Knowledge; learning; skills	Enjoyable leisure, serious leisure, peer tutoring
Persevere; personal effort	Serious leisure
Self-development	Serious leisure
Social opportunities and benefits	Enjoyable leisure, serious leisure, Hypotheses 1-5
Subject interest	Hypothesis 7
Value; worthwhile	Enjoyable leisure. Hypotheses 6 & 7
Work: job; obligation	Volunteering is work, not leisure

Three other categories were added to these keywords, which were drawn from the data rather than from the conceptual framework and featured as significant factors in the respondents' decision to volunteer. These were *local*, the proximity of the organisation and *work experience*, since only a small proportion of respondents was seeking work experience or this had been their initial prompt to offer their services. *Work experience* and *work* differ as key concepts as *work* refers to respondents description of their activity using the language of work, for example calling it a job, however, they do not state that they are seeking work experience.

Analysis of the data concerning the volunteers' interaction with visitors generated additional key words including *share learning*, which was when visitors imparted information along with the volunteers, in contrast to *answering questions*. *Provide service* reflected volunteers' comments about their role and *dull without visitors* highlighted the important role interaction has in the volunteers' motivation. Specifically, *welcoming*, *help* and *provide service* refer to the service encounter model; *enjoy meeting people* and *welcoming* link to the host-guest encounter and *share learning* and *answering questions* refer to peer tutoring. However, these key words

emerged from the data and were not prescribed by the literature, although there are clear links with the three models presented in 3.9 and hypotheses H2-H4.

#### Visitor interviews

Visitor data were analysed using the same methods as for the volunteer interviews. Quantitative data were coded and entered into SPSS to calculate frequencies and cross-tabulations, with the results tested where appropriate with the chi-square test of statistical significance (Bryman & Cramer, 1997). This allowed a comparison between the visitors' and the volunteers' characteristics.

Qualitative data were analysed using content analysis, as above, however, a separate content dictionary was devised, using the literature on encounters. *Comfortable*, *atmosphere* and *enjoyment* referred to Hood's definition of enjoyable leisure, as presented in Box 3.2 (Hood, 1983), while the other key words relate directly to hypotheses 2-4, exploring the nature of the volunteer-visitor encounter. The content dictionary is presented in Table 5.5.

**Table 5.5 Content Dictionary for Analysis of Visitor Responses**

<b>Keyword or Phrase</b>	<b>Theoretical Proposition</b>
Comfortable; atmosphere	Enjoyable leisure
Enjoy(ment)	Enjoyable leisure
Friendly	Host-guest encounter – hypothesis 3
Helpful	Service encounter – hypothesis 2
Knowledge; learning	Peer tutoring – hypothesis 4
Satisfaction	Service encounter – hypothesis 2
Social	Service encounter, host-guest encounter – hypotheses 2 and 3
Welcome	Service encounter, host-guest encounter – hypotheses 2 and 3

Additional key words, which emerged from the data, included *added value*, that is the volunteers provided something extra to the visitor experience; and *negative*, since not all the visitors were complimentary about the volunteers and this should be acknowledged within the analysis.

The quantitative and qualitative data was linked, by attributing each volunteer interview a unique code, for example F1, for the first interview at Fountains Abbey. All

qualitative comments by respondent F1 were labelled as such, meaning that respondents could be sorted by specific variables in SPSS, for example length of service, which could then be cross-referenced with their qualitative responses. This enabled comparison of volunteers' motives by length of service, age group and work status to be carried out. Finally, the data from all the interviews has been stored on disk, in order for replication of the study, if required.

## **5.6 Limitations of the study**

### **Sampling**

The sampling process has been documented in detail both in the previous chapter and in this chapter. The aim of the sampling process was to maximise external validity through the range of case studies chosen. However, within the time scale and resources of the project only a limited number of case studies could be included. While all possible variations, as identified in previous research, were taken into account, no private sector organisations were included in this research, all case studies were either from the public or voluntary sectors. The BAFM survey (BAFM, 1998), reported in Chapter Two, found that members of the Historic House Association did involve volunteers, though it is not clear how far volunteers, rather than paid staff, are involved in front-of-house roles. Unfortunately this thesis does not increase our understanding of volunteering within privately owned historic houses. However, since this study is intended to be relevant to the wider voluntary sector, rather than limiting itself to the heritage sector, the focus on voluntary organisations, with a small number of public sector comparisons is legitimate.

### **Fieldwork**

The research plan identified two major constraints on the research: time and access. Time was a limiting factor as interviewing was limited to the visitor season, Easter to October. While some of the case studies are open all year round, others are not. In practice the case study interviews were all conducted between May and October 1998. Within this timescale there were clearly more popular days for visitors, for example good weather, weekends and school and bank holidays. While volunteers were on duty on all days (depending on the case study, as some are not open every day), the number of visitors could clearly have some impact on their mood when being interviewed. For example, if motivated by interaction, then a volunteer may be less motivated on a quiet

day, with fewer visitors. However, on a very busy day, volunteers may not have time to talk to visitors, or each other, as much as they would choose and may be equally demotivated. In order to compensate for this, fieldwork was carried out at weekends and both during and outside school holidays. However, it was more difficult to compensate for poor weather and this is noted within each case study summary. The impact of poor weather on response rates is discussed further under 'Interviewing visitors'.

Access was also a potential constraint as the choice of case studies was dependent on gaining allowed access to the museums and heritage attractions chosen for the study, their managers, volunteers and visitors. Gummesson documents the divergence between ideal research practice and the reality of conducting research with real people and organisations (Gummesson, 2000). In practice each of the original case studies sampled for the research agreed to take part in this study, however, some managers were more forthcoming than others and were more generous in allowing access to internal documents.

#### Interviewing volunteers

Since volunteers give their time freely, it was important to interview them while they were on site for their shift, in order to maximise the number of respondents. As it was not possible to ask the volunteers to stay longer than their shift, some of the older volunteers had transport pre-arranged, the interview time was limited in some cases. This was particularly the case with room stewards, although it was possible to interview a small number during their breaks. For volunteer guides it was possible to obtain longer interviews between tours.

Researchers note that the interview is a two-way conversation and the interviewer cannot ignore the influence they might have on both the respondent and the responses (Arksey & Knight). The interviewer's age, gender, clothes and accent can all influence the respondent (Healey & Rawlinson, 1993). The only measures that could be taken to counteract these influences within this study was that all interviews were conducted by the same person, the researcher, who dressed in a similar manner for each interview, wearing a name badge and jacket.

However, the impact of the interviewer was made clear in the differing attitudes of volunteers towards the interviewer as volunteers varied in their cooperation. At almost all case studies volunteers were happy to talk about their activities, at the Cutty Sark, for example, the interviewer was clearly seen as independent and volunteers gave, what may be classed, as confidential information, asking for it not to be tape-recorded. However, at one site in particular, Knole, the volunteers were hostile to the interviewer. The volunteers were also hostile to the managers and it seems they connected the interviewer with the management. In addition, the interviewer was a young woman and found that older male volunteers were more open than older female volunteers, though again it was only at the one site, Knole, where the older female volunteers were particularly hostile. King notes that interviewers will sometimes meet hostile interviewees and these must be balanced against the more numerous cooperative respondents (King, 1994).

Finally, the postal questionnaire was subjected to possible bias, since the managers of each case study could choose which volunteers to send the questionnaire to. While this was an inevitable drawback of involving the managers in the selection procedure, this form of gate-keeping was unavoidable. If the researcher had asked the manager for a list of volunteers' addresses, a determined manager could choose to provide only the addresses of those volunteers they wish to respond. This gate-keeping may have resulted in the volunteers reporting a more positive view of their experience, than is representative of the volunteers as a whole and this should be borne in mind in the reporting and interpreting of the results.

#### Interviewing visitors

As with the volunteer interviews, the impact of the interviewer on the visitor respondents cannot be ignored, although no particular pattern presented itself. Again, the researcher sought to minimise any adverse impact by maintaining consistency in appearance and by wearing a badge indicating that the research was for a university project. The key limitation with interviewing visitors was that at some of the sites there was nowhere indoor to stand while interviewing visitors. In poor weather this was clearly a problem, which decreased response rates, since visitors were unwilling to stand and be interviewed. The case studies where this was evident were Kinver rock houses, Yorkshire Sculpture Park and Fountains Abbey. Even relatively indoor attractions

suffered from poor weather, for example the last day of interviewing at Brodsworth Hall was cold and rainy, and there were very few visitors. Since visitors were interviewed at the ticket desk, before entering the house, they were very unwilling to stop and be interviewed. In addition, at the Severn Valley Railway it was particularly difficult to gain visitor respondents, as visitors tended to only arrive in time for the train journey and had little time to answer questions. Weather is acknowledged as having a significant impact on visitor numbers at museums and heritage visitor attractions (Hanna, 1997). However, in this particular study the impact was likely to be even more significant as the choice of case studies, such as National Trust properties and open-air museums, included a large proportion of outdoor attractions.

Overall these problems were unlikely to have a significant impact on the validity of the data. Measures were taken to try and counteract any bias from entering the data being collected, such as always dressing in a similar manner. All social research designs have flaws as researchers are dealing with real people in real world situations and the best researchers can do is to acknowledge problems and seek ways to either eliminate or embrace these in the research design and analysis.

### **5.7 Chapter summary**

This chapter reported on the data collection, detailing the number of respondents and discussing the quality of the data. The validity of the data is debated since a primary aim of this research is to maximise external validity necessitating a trade-off with internal validity. This was achieved by obtaining a large number of responses with a high response rate, which were found to be representative of the sector as a whole, when compared to the surveys reported in Chapter 2. While the data were variable enough in order to answer the research questions and allow alternative explanations to be sought, as required by conclusion validity, the high proportion of older, retired volunteers means that comparisons with younger volunteers' motivations are limited.

Construct validity was reinforced through a triangulated research design and conclusion validity through the data analysis. The collected data were a combination of quantitative and qualitative data and these were analysed separately, using statistical analysis with SPSS and content analysis in Word, though the two analysis techniques were linked through coding the respondents, in order to allow cross-data analysis. Finally, the

limitations of the study were considered and mainly consisted of the difficulties of undertaking real-life social research *in situ*. These limitations were not considered to have biased the sample.

The next chapter provides background on the ten case studies and reports on the data pertaining to the management of the volunteers and development of the volunteer programmes, in order to set the context for the volunteers' responses.

## Chapter 6: The Case Studies

### 6.1 Introduction

Chapter Three presented two models of volunteering: the economic model and the leisure model. Moreover, each model was noted to have implications for volunteer motivation. This chapter reports on the background to each case study and presents the analysis of the management data. Since the strength of case studies is their context (Yin, 1994), a brief description of each case study is given. The management of the volunteers and the volunteer programme is compared with McCurley and Lynch's model for professional volunteer management (McCurley and Lynch, 1998). Since *professional volunteer management* represents the economic model for viewing volunteers, this comparison enables each case study to be scored according to how far the economic model or leisure model is prevalent at each of the organisations studied. This analysis is important because the way in which the volunteer is viewed by the organisation may well impact on the type of encounter they have with visitors. For example, if the volunteers are viewed as unpaid staff, whose role is to provide a service for the visitors, then the visitors may well view the encounter as a service encounter, even if the volunteers do not. In turn this provides contextual data for the analysis of volunteers' motivations in the next chapter.

Each case study is scored according to how far they conform to the *professional volunteer management* model. This gives them a Volunteer Management Orientation Score (VMOS). The categories used are

- Needs assessment and programme planning
- Job development and design
- Recruitment
- Interviewing and matching
- Orientation and training
- Supervision and motivation
- Recognition
- Evaluation (with community involvement)



The scoring system uses a simple Yes = 2; No = 0; Some = 1. Thus, a case study with a VMOS of 0 uses no professional management procedures, while a case study scoring 18 (or more) conforms entirely to the professional management model. A VMOS of between 8 and 12 means that some professional management procedures are used. Thus a score of less than 8 would suggest that professional management has not been applied at that organisation, while a score of 13-17 would suggest that several professional management procedures had been introduced. Additional points were awarded for the following: attributing an economic value to the volunteers' activities; for each member of staff (paid or voluntary) with specific responsibility for volunteers e.g., two points are awarded for a paid volunteer coordinator, with an additional point if they have an assistant; a signed volunteer agreement and plans to introduce more formal structures. Finally, the data is compared with the surveys reported in Chapter 2.

## 6.2 Fountains Abbey and Studley Royal Estate, Ripon

Fountains Abbey is a large multi-site estate. The significance of the Fountains Abbey estate means that it is also a UNESCO World Heritage Site. At Fountains Abbey the National Trust work in partnership with English Heritage, which maintains the structure of the Abbey and own St Mary's Church, while the National Trust own the estate and manage the whole site.

**Table 6.1 Management profile at Fountains Abbey**

Number of volunteers	250 across the site involved in education, events, as organists in the church, distributing leaflets, giving wildlife talks, as well as the estate wardens, guides and information stewards interviewed in this study.	
	350 on residential projects	
	50-60 specifically involved as guides	
How the programme developed	The number of buildings open to the public could no longer be staffed by paid staff and a National Trust primary objective is to achieve access. Involving volunteers "Gives greater capacity for putting people front-of-house." (Volunteer Coordinator) Volunteers were involved since 1985, first as Information Stewards, then Guides and then in education projects. The estate's size and status mean that it is self-financing, in that it does not receive any central funds from the National Trust and must generate its own income. This means that the work provided by the volunteers is vital to the smooth running of the estate.	
Volunteer coordinator	One paid volunteer coordinator, with two seasonal assistants	4

Volunteer policy	The National Trust policy and own policy booklet, although this is mostly factual information for the volunteers. There is a verbal, rather than a written, agreement as volunteers objected to the latter.	2 1
Job development and design	This has evolved.	0
Recruitment	Fountains Abbey no longer actively recruit, word-of-mouth attracts new volunteers.	0
Interviewing and matching	In the process of tightening up procedures – cannot ask existing body of volunteers for references; “We have a chat with them on the phone, get a feel for them and line up their interest with various vacancies, then get in touch with the team coordinator, introduce them to the site and training” (Volunteer Coordinator). Volunteers are asked to give references if they will be working with children.	1
Orientation and training	“It’s very low key” (Volunteer Coordinator). All new staff and volunteers are inducted together. This covers visitor care, health and safety, tour of the property for 1 ½ days and ½ day on their specific area of work. The guides get a minimum of 8 days training.	2
Supervision and motivation	Volunteers work in teams, with a voluntary team coordinator. Staff spend around 63 hours a month supervising volunteers – who contribute approximately 1500 hours of work per month.	1
Recognition	Travel expenses, National Trust volunteer card after 50 hours service; volunteers’ contribution attributed an estimated economic value of £92 000 p.a. at £4 an hour.	2 1
Evaluation	Indirect – e.g. depends on visitors’ comments	0
Documentation	Informal training records are held.	1
User evaluation	This is usually from unsolicited letters sent by visitors, however there are comments slips for visitors to fill in.	1

VMOS = 16

While Fountains Abbey already has a high VMOS, the Volunteer Coordinator stated that they would like to introduce a more structured approach to volunteering. For example, the turnover of volunteers is low so there is no active recruitment and he believes it would be difficult to ask existing volunteers for references. However, the day-to-day management of such a large number of volunteers, in spite of help from two assistants, takes up all his time and leaves little room for planning. Yet the volunteer programme at Fountains Abbey does follow the National Trust policy (National Trust, 1999) as the volunteers do have a line manager for each volunteer group, they are able to claim their expenses and they are given induction training, including health and

safety. Moreover, each volunteer is provided with a volunteer handbook covering all the health and safety procedures for the estate. These features contribute towards Fountains Abbey's high VMOS.

### 6.3 Knole, Sevenoaks, Kent

Knole was given to the National Trust in 1947, with the proviso that the Sackville family, who owned the house, could still live there. Although Knole is one of the largest country houses in Britain, only 13 rooms are open to the public.

**Table 6.2 Management Profile at Knole**

Number of volunteers	120, but numbers are decreasing as it is difficult to replace aging volunteers. They would like another 80, to relieve pressure from existing volunteers.	
How the programme developed	Originally there were paid guides. Room stewards have been involved on voluntary basis for at least a decade. Volunteers who worked as guides refuse to steward some rooms.	
Volunteer coordinator	Two paid volunteer coordinators on job share and two voluntary coordinators, who help with working out rotas and making tea for the volunteers.	4
Volunteer policy	National Trust policy booklet	2
Job development and design	This has evolved from guiding to stewarding.	0
Recruitment	Local National Trust groups, NADFAS groups and volunteer bureaux. A mailshot was done to all local residents, but was expensive.	2
Interviewing and matching	Potential volunteers are interviewed and references are sought.	2
Orientation and training	40 of the volunteers have completed the Tourist Board's visitor-care training, Welcome Host. This also includes health and safety awareness, conservation and a pre-season briefing each year. A file, which is provided at each steward station, contains the health and safety procedure, information about the room and a list of the volunteers' responsibilities.	4
Supervision and motivation	The paid volunteer coordinators supervise volunteers.	
Recognition	Travel expenses of £2 a shift; National Trust volunteer card after 50 hours of service; tea, coffee and biscuits.	1
Evaluation	"Not really, we very much need volunteers, so we'll take anyone." (Volunteer Coordinator). The volunteers contribute an estimated 1100-1300 hours per month.	0

Documentation	Names and addresses from applications forms and training records for Welcome Host are held.	1
User evaluation	Occasional visitor surveys, administered by the regional office. Unsolicited letters from visitors.	0

VMOS = 16

Knole has a relatively high VMOS, though this is clearly a more recent feature. An example of how the management at Knole has changed over the years is training. While one long-serving volunteer commented that:

“We’re offered training, but I’ve been doing it so long. I’ve grown up with it and they are only recently offering the course. I went along but didn’t learn much.”

This contrasts with the experience of a volunteer who had only been involved for two months:

“I spent time with Bobby [one of the paid Volunteer Coordinators], who showed me the health and safety. Bobby went through the conditions and the stewards’ book and I’m on a trial period, but I don’t know how strict they are.”

As with Fountains Abbey, Knole has largely followed National Trust policy and has many similarities with McCurley and Lynch’s model for *professional volunteer management*. While Knole has scored as highly as Fountains Abbey, Knole offers out-of-date travel expenses and there is conflict between the long-serving volunteers and the management. This may contribute to their recruitment problems.

#### **6.4 Kinver Rock Houses, Kinver Edge**

Kinver Rock Houses are a feature of the National Trust site of Kinver Edge, a natural sandstone cliff, which attracts many visitors for its views and wildlife. The rock houses at Holy Austin Rock were carved out of the sandstone at the foot of the cliff and were inhabited for centuries before finally being abandoned in the 1950s.

**Table 6.3 Management profile at Kinver**

Number of volunteers	26 volunteer at the rock houses, 3 during the week and about a dozen helping on site at the weekend.	
How the programme developed	A group of local volunteers began clearing around the rock houses, and decided to try and get them restored and open to the public. Volunteers have been involved across the estate since 1996 and the rock houses have been open since September 1997.	
Volunteer coordinator	The volunteer group is self-regulating with a voluntary coordinator.	2
Volunteer policy	National Trust policy.	2
Job development and design	Evolved on impetus of volunteers	0
Recruitment	Notices around the village, one outside the rock houses, people's friends. The Estate Warden thinks that with opening the rock houses the National Trust are now seen to be doing something positive with the site and that this has helped in attracting volunteers.	1
Interviewing and matching	"We don't have any. With some places you have to be careful, as they've either got to be compatible with children or valuables. Obviously we use common sense but we would take anybody. When you've been working in this business for a long time you tend to spot a bad lot." (Estate warden)	0
Orientation and training	Welcome Host was organised by the Regional National Trust office for about half the volunteers. "We don't [have health and safety induction], we really should have something. All the information is in the rock houses, I don't suppose they've all read it. We're lacking a little in things like health and safety procedures, we'll get round to it one day" (Estate warden) However, new volunteers are put on the same shift as two experienced stewards when they first start:	1
	"We've arranged the rota so there's two experienced volunteers and one less experienced person who listens to what goes on." (Estate warden)	1
	When a new volunteer starts they are rotaed on with two experienced volunteers.	
Supervision and motivation	"At the rock houses most do it because of the historical importance of the rock houses. They grew up with the rock houses, they knew them as inhabited and they want to do something to support them" (Estate warden)	0
Recognition	"Technically we should offer mileage rates, as every other National Trust property should, but I can't afford to offer them" (Estate warden); National Trust discount cards after 50 hours of service, but as volunteers only help for a few hours on occasional Saturdays, this is difficult to attain. Some volunteers have them, including the voluntary coordinator.	1

Evaluation	None. "I've known most of them personally over the past 10-12 years before they actually volunteered" (Estate warden)	0
Documentation	The voluntary coordinator keeps names and addresses.	1
User evaluation	None.	0

VMOS = 9

As there are no facilities at the lower houses they are only open for two hours at a time on Saturdays, with three volunteer stewards on duty.

As the volunteer group is self-regulating and such a small number there is much more scope for involvement in decision-making than at a larger National Trust property, although the close autonomy enjoyed by the volunteers can bring them into conflict with the staff. On one of the study days the Parish Council were visiting the rock houses since the volunteers had nominated it for a local heritage award. However, the Custodian, who had to actually show the Council around as none of the volunteers had come that day, was not so impressed and said that the volunteers sometimes forget that it is the National Trust, not them, that own the rock houses. In contrast to this, one of the volunteers commented:

"I would like to feel a full member of the National Trust, i.e. part of their organisation and not just an odd body."

Moreover, while some of the volunteers are very involved in the rock houses, others simply want to do their shift and leave:

"Peter [the voluntary coordinator] ...does try and involve as many people in the group, but sometimes they won't volunteer to do things like that [designing leaflets], they just want to come and talk to people on a Saturday afternoon for a couple of hours." (Estate warden)

Professional management procedures are not employed at Kinver and the National Trust policy is not adhered to strictly, for example volunteers do not receive any travel expenses. The volunteers are self-regulating, but the above example of the conflict between the Custodian and the volunteers shows that while the volunteer group may be an example of 'organising around enthusiasms' (Bishop & Hoggett, 1986), the

Custodian views the volunteers from the economic paradigm, as primarily to assist the National Trust.

### 6.5 Brodsworth Hall, Doncaster

Brodsworth Hall is a 19th century country house near Doncaster, owned and managed by English Heritage. Thus, Brodsworth Hall is publicly owned and funded.

**Table 6.4 Management profile at Brodsworth House**

Number of volunteers	120 volunteers involved as room stewards.	
How the programme developed	The house opened to the public in 1995. As a large number of rooms are open, 30, it was realised that these could only be stewarded by volunteers.	
Volunteer coordinator	Volunteers are managed directly by the property manager.	1
Volunteer policy	English Heritage policy, issued after the interviews conducted. For insurance purposes volunteers must be appointed formally with a pro forma letter, which they must sign and return.	2
Job development and design	The role of the volunteers has been based on the National Trust model for room stewards.	1
Recruitment	When the property first opened local media appeals and talks to local groups were used, however, since then, the number of volunteers has been fairly stable with no specific recruitment campaign.	1
Interviewing and matching	Volunteers are invited for a visit and are asked to sign an application form. Only one volunteer role means no matching is required.	2
Orientation and training	½ a morning basic induction, then a briefing session at the start of each season, detailing any changes to the house. Training is becoming more difficult as volunteers start at different times and they are at different levels. "At the beginning of the season we have an induction day and a tour of the house. A new bloke was put on with me, which is comforting as when you're on your own it's a lot to learn." (Volunteer)	2
Supervision and motivation	The house steward supervises the volunteers.	1

Recognition	The policy states that volunteers can be offered recompense in the form of travel expenses as mileage, tea and coffee facilities and free membership of English Heritage after 30 days service in any one year. "A discount in the shop, tea and biscuits, social events for the staff and stewards, Christmas party and a barbecue. Pre-season briefings, updates and a buffet" (Volunteer). "Volunteers don't expect more, they come here for the pleasure" (Property Manager).	2
Evaluation	Indirect, i.e. comments from volunteers.	0
Documentation	Names and addresses of volunteers are held.	1
User evaluation	None, other than unsolicited letters and comments from visitors.	0

VMOS = 13

English Heritage issued a two-page policy report on the involvement of volunteers in October 1998. However, while individual properties, such as Brodsworth Hall, can involve volunteers and volunteers have also been involved on specific projects such as archaeological digs, volunteers are not involved on such a wide scale as with the National Trust. English Heritage's volunteer policy states that volunteer involvement should be additional to existing staff and should not be used to replace existing posts. In addition, the trade union should be consulted on all proposals to involve volunteers.

Brodsworth Hall has no member of staff with specific responsibility for volunteers and they are responsible to the Property Manager. Professional volunteer management procedures are partly adhered to. However, aside from English Heritage's generic policy, which clearly considers volunteers in relation to what they can offer the organisation, rather than what the organisation can offer the volunteers, there are no specific procedures for Brodsworth Hall. For example, there is no recruitment policy and word of mouth recommendation is relied on for this. In addition, while the volunteers have a different role from paid front-of-house staff, they have no job description. Yet since all volunteers undertake the same activities, this would be fairly simple to construct.

## 6.6 Amberley Museum, Sussex

Amberley Museum was opened in 1979 after several local historical groups had come together to try and form an industrial museum for the South of England, similar to



Beamish North of England Museum, near Durham, and the Black Country Museum in the West Midlands. Amberley is spread over a large site in an old quarry, which includes a bus garage and a steam railway, as well as 28 other industrial heritage exhibits. Amberley Museum is a charitable trust.

**Table 6.5 Management profile at Amberley Museum**

Number of volunteers	220 volunteers are involved across the site in various capacities. Volunteer activities include restoring machinery, demonstrating exhibits and helping on the ticket desk and in the café. “The museum wouldn’t operate without the volunteers, they are the essential foundation of the museum.” (Museum Director).	
How the programme developed	The museum opened in 1979 with local voluntary groups and one paid director. Volunteers have been involved ever since.	
Volunteer coordinator	Volunteers work in self-directed teams. The training and development plan recommended employing a Volunteer Coordinator, but the museum does not have the resources to do this.	1
Volunteer policy	This is being developed. Volunteers are provided with a booklet.	1
Job development and design	This has evolved over time with more paid staff taking over volunteer functions.	0
Recruitment	Usually self-recruitment, i.e. word-of-mouth recommendation or visitors: “I came here with my wife on a visit and got talking to the secretary of the Friends who said they needed volunteers” (Volunteer). “Occasionally we’ll have drives but mostly if you come along or you know someone here, it’s the reverse of equal opportunities, people come because it’s the same sort of people here. They’ll stay for a very short time and go or stay for a very long time.”(Museum Director).	1
Interviewing and matching	All new volunteers are interviewed. The training and development plan has recommended a programme of formalised interviews, however, “at the moment it’s fair to say that we’re not rigorous about turning people away.” (Museum Director). The museum is short of volunteers in some areas, but has too many working in others.	1
Orientation and training	½ day induction and on-the-job training with either a volunteer or paid member of staff. A new training programme is planned to meet visitors’ needs more. For example, new volunteers will be given a basic list of common questions that visitors might ask. “I would like to learn to use all the machines. We are short of people so experienced people are not coming to train us, it’s the biggest snag.” (Volunteer)	1

Supervision and motivation	Self-supervision in teams. “Some come for the good of the museum in general, but most of them work on specific projects or specific enthusiasms.” (Museum Director)	1
Recognition	Discounts in the shop and the café and free admission. Volunteers do not get travel expenses: “It costs a lot of money. I would like petrol at £5 a time.” (Volunteer)	1
Evaluation	No particular evaluation. Volunteers contribute an estimated 35 000 hours p.a.	0
Documentation	A record form collecting details, especially to record training to comply with health and safety legislation.	2
User evaluation	Comment cards, occasional focus groups and formal surveys. Unsolicited letters from visitors.	1

VMOS = 10

The Museum Director believes that the volunteers at Amberley Museum are a great asset and commented that:

“Volunteers are perceived to be more friendly and interested than paid staff, because they’re not here everyday...they don’t get as stale”

Amberley Museum does not employ professional volunteer management procedures. Recruitment is ad hoc and payment of expenses non-existent. However, the new training and development plan is moving towards introducing more structured recruitment, training and supervision. This is partly the result of an aging volunteer group and partly a move to be more visitor-friendly, for example by ensuring that all volunteers on site, whether demonstrating exhibits or restoring machinery, can answer basic questions for the visitors. In spite of these proposed moves, limited resources mean that the professional management model can only be pursued so far.

### **6.7 Avoncroft Museum of Buildings, Bromsgrove**

Avoncroft Museum of Buildings was founded in 1967 as a response to the threat of development facing the last medieval building in Bromsgrove and now has 24 buildings. Avoncroft Museum of Buildings is a charitable trust.

**Table 6.6 Management profile at Avoncroft Museum of Buildings**

Number of volunteers	100-130 volunteers, mostly involved in stewarding buildings, but also helping in the shop, café and on the admissions desk.	
How the programme developed	The museum opened in 1967 with one paid director and volunteers. Volunteers have been involved ever since.	
Volunteer coordinator	Various members of paid staff have roles – the site manager makes sure the rota is covered and manages volunteers on site; the administrator gets people to fill the rota, another member of staff does the weekend rota. “This year we’ve created the role of volunteer liaison, who’s a chap who’s taken early retirement from teaching because of medical problems. He comes in once a fortnight when he’s feeling fit enough. That’s worked very well but it’s very ad hoc as he’s not very well.” (Museum Director)	1
Volunteer policy	There are written files for each manned building, consisting of health and safety procedures and historical information, but no written volunteer policy. A new member of staff is working on developing a volunteer handbook.	1
Job development and design	“Volunteers were really involved from the beginning, about 30 years later the role of volunteers has changed beyond all recognition” (Museum Director). The first building was manned by an information steward in 1987.	0
Recruitment	“We have close links with the local volunteer bureau in Bromsgrove. Two or three of our very good volunteers we’ve recruited recently have come through that method...a piece in the annual newsletter to members (Friends of Avoncroft Museum) at the beginning of each season. For the telephone collection we wanted to recruit a totally new group and we did that very differently through the BT magazine and press releases.” (Museum Director)	2
Interviewing and matching	“It sounds very grand to say we have selection methods. [These are] informal, if someone approached us as a response to any recruitment, we telephone them and meet them and go on gut reaction immediately for where they could get involved, they may strike you as someone who is very gregarious, very outgoing and we would think ‘Yes, front of house’. They clearly have their own views and we say to them ‘You’ve seen the museum, you’ve seen what we do, what sort of area would you be interested in?’” (Museum Director)	1
Orientation and training	No general volunteer training, though issued with site rules, health and safety rules and a badge for which they have to sign. Then a day or two shadowing an existing warden, “I was petrified. I came on Easter	1

	Monday and it was a busy day. There were two wardens and I spent the day with them to learn the patter. I was thrown in at the deep end at the prefab and the same at the windmill.” (Volunteer). One week’s closed season training in February. “Briefing about the developments and new procedures before the start of the new season; role-play before the start of the new season.” (Volunteer). This is not compulsory but volunteers are encouraged to attend. “Normally the people who don’t attend are the people we would like to, some of our longer standing volunteers who are set in their ways.” (Museum Director)	1
Supervision and motivation	New volunteers shadow an existing volunteer. There is also a site manager, who is assisted by volunteers at the weekends. “They enjoy the work they do when they’re here – a combination of the work they do and the people they meet.” (Museum Director)	1
Recognition	Some volunteers receive an hourly allowance of £1.10. 10% discount in the shop and café (the same as paid staff) and free entry to the museum, “also for friends and family if they ask in advance, but this is not promoted.” (Museum Director). Volunteers do not receive travel expenses: “It costs me money, no expenses.” (Volunteer)	1
Evaluation	“Yes, we mainly make an effort to talk to their shadow person, it’s a person to person evaluation, too much of this sort of thing is written, and that’s not helpful when you’re dealing with visitors.” (Museum Director) Volunteers contribute an estimated 240 hours per week. There is a comments book held by the Site Manager for volunteers to write in. Two volunteers are members of the Museum’s Council of Management.	1
Documentation	Names and addresses of volunteers are held.	1
User evaluation	Self-completion questionnaires at weekends. Unsolicited letters from visitors.	1

VMOS = 13

In spite of paying some of the volunteers, volunteer management at Avoncroft Museum of Buildings does not follow all good practice procedures for professional management. Moreover, the Museum Director sees this more ad hoc approach as beneficial:

“It’s for morale and the philosophy [of the museum], as people are involved because they want to be, rather than they have to be. This has a beneficial impact on the whole atmosphere.”

However, the plans for a volunteer handbook may lead to a more structured approach to managing volunteers.

### 6.8 Yorkshire Sculpture Park, West Yorkshire

The Yorkshire Sculpture Park was opened in 1977 and is an open-air sculpture gallery. As well as the exhibits outside there are two covered galleries, the Bothy and the Pavilion, both small exhibition spaces. The Yorkshire Sculpture Park is a charitable trust.

**Table 6.7 Management profile at the Yorkshire Sculpture Park**

Number of volunteers	25 volunteers, involved as invigilators in the Pavilion Gallery	
How the programme developed	Volunteers were involved from the early 1980s, when the park first opened. However, their day-to-day duties have increased. "Friends were brought in at the beginning to ease the pressure off staffing when the park first opened" and "a secure, reliable workforce is needed." (Volunteer Coordinator)	
Volunteer coordinator	Introduced March 1998. "They've actually got someone who they can go to when they have any queries." (Volunteer Coordinator)	2
Volunteer policy	The volunteer coordinator is hoping to implement a volunteer policy.	1
Job development and design	The job has evolved, recently increasing to include book sales and longer opening hours.	0
Recruitment	The volunteers are all members of the Friends of the Yorkshire Sculpture Park, which has been in existence for 11 years, and volunteers are only recruited from the Friends organisation. The Friends group is a separate organisation from the Yorkshire Sculpture Park and has its own constitution and charity registration. Volunteer opportunities are advertised in the Friends' newsletter. "I assume the majority of volunteers are retired or students, as they work during the week." (Volunteer Coordinator). The Friends Committee promotes volunteering in their newsletter.	1
Interviewing and matching	Interview and references are asked for. "We have a formal sort of application that new volunteers fill in, where they write down interests and experience and references, we interview as well."	2
Orientation and training	2 hours in the gallery to "get the feel of it", then more formalised training including "the day to day running of the gallery, cleaning, working the till, sort out takings at the end of the day". This takes place over a few weeks during which time the new	2

	volunteer shadows an experienced volunteer. “Pre-exhibition talks, meetings with other volunteers and health and safety matters.” (Volunteer). The Volunteer Coordinator wants to set up a formal induction for all gallery staff, whether paid or voluntary.	
Supervision and motivation	The volunteer coordinator supervises the volunteers in the gallery. “They are very committed people, part of their generation ethos, they enjoy being in a public space and in charge of the gallery.”	1
Recognition	£2 for travel, parking permits, trips and talks.	2
Evaluation	Not formally, the coordinator verbally checks that the volunteer is happy and understands.	1
Documentation	Application form with personal details.	2
User evaluation	None	0

VMOS = 14

Just before the case study interviews were conducted, a volunteer co-ordinator had been recruited, who planned to introduce more structured training that could lead to National Vocational Qualifications (NVQs), and develop a better input from the volunteers into the running of the park. It is unclear how the volunteers would welcome these changes as some felt that their role had already been exploited through the extra demands placed on them with the cash till and opening hours described below,

“Too much is expected.” (Volunteer)

For example,

“I check the float, man the Pavilion and clean if it needs it. I meet the public and make them welcome and sell books.” (Volunteer)

A member of the Friends Committee contends that the volunteers are treated like staff, however, their role has gradually increased from simply invigilating the art gallery with a small amount of cleaning, to selling books and postcards. For example, afternoon meetings used to include some training, an opportunity for a grumble and afternoon tea. Now there is only training. This expanded role, with little consultation with the volunteers, has become too much for some. In fact, when the Park extended its opening hours by one hour, the volunteers on duty were not informed until they had arrived for their shift and were expected to stay for the extra hour.

The Yorkshire Sculpture Park has only a small number of volunteers and has maintained a fairly ad hoc approach to managing them. However, this has been helped by recruitment limited to the Friends of the Yorkshire Sculpture Park and by the volunteers only undertaking one role. Volunteers are clearly seen as supportive to the paid staff and are expected to put the Yorkshire Sculpture Park first, in the same way as paid staff would be, as the expanded opening hours with no consultation demonstrates. Yet the new Volunteer Coordinator clearly plans to introduce a more structured policy, such as training for NVQs, which will follow professional management procedures more closely. While this may be appropriate for the students she mentions as regular volunteers, retired volunteers may not welcome these further changes.

### 6.9 Cutty Sark, Greenwich

The Cutty Sark is a tea clipper ship, famous for its speed, which is now moored at Greenwich, where it forms one of the maritime heritage visitor attractions. The Cutty Sark was originally towed to Greenwich in 1951 for the Festival of Britain and was officially opened to the public in 1957. The Cutty Sark is managed by a charitable trust.

**Table 6.8 Management profile at the Cutty Sark**

Number of volunteers	24 volunteers are involved as tour guides and helping school visits	
How the programme developed	Volunteers have been involved since May 1992 to give free, guided tours.	
Volunteer coordinator	The Visitor Services Manager is responsible for all the volunteers.	1
Volunteer policy	None written.	0
Job development and design	Volunteers were recruited from the start as guides.	1
Recruitment	“When we’ve advertised, we’ve usually got weirdos and you spend a lot of time weeding them out. Mostly now I used word-of-mouth, the Royal Naval Association and the British Seaman’s Association, it’s appeared in their newsletter.” (Visitor Services Manager). Some volunteers are studying for National Vocational Qualifications (NVQs) in Guiding and Interpretation at nearby Woolwich College: “This began as a placement for my NVQ course, though I stayed on.” (Volunteer)	1
Interviewing and matching	Volunteers fill in an application form, have an interview and give references “but I rarely take them up.” (Visitor Services Manager)	1

Orientation and training	“Health and safety, it depends on their background, a basic script for the tour, a lot of time with other volunteer guides because that is the way they learn the stories and pick up useful information from visitors. Not really any specific visitor care training.” (Visitor Services Manager). “For the first few weeks you’re given a script, it’s basic information that the public should know and you incorporate it.” (Volunteer)	2
Supervision and motivation	“It’s something to do when they get up. They’re all retired bar one or two, but young enough in mind to want to do something.” (Visitor Services Manager)	0
Recognition	Travel and parking expenses, £2 for food and a uniform to wear (sweater, Breton, pea-jacket and t-shirt).	2
Evaluation	Only from informal observation.	0
Documentation	Application form with personal details, such as names and addresses.	1
User evaluation	Occasional surveys. Unsolicited letters from visitors.	1

VMOS = 10

The volunteer role at the Cutty Sark is clearly defined, which is made easier as the ship is such a small organisation. The only paid front-of-house staff are the admission staff and the people working in the snack bar, thus there is a distinction between paid and voluntary roles, with the paid staff taking responsibility for money transactions.

Volunteer management at the Cutty Sark includes some of the procedures expected in a professional volunteer programme. For example, volunteers fill in application forms, are interviewed and asked for references. Volunteers receive expenses for both travel and food while on duty and they receive a basic level of training. Moreover, a significant proportion of volunteers were initially attracted to the Cutty Sark as part of a work placement for their NVQ. Yet there is no written volunteer policy, there is no job description in spite of there being only one volunteer role and the programme is not evaluated. Therefore the volunteer programme at the Cutty Sark does go some way towards being a professionally managed programme, but more documentary support for both the volunteers and the managers would be needed. For example, a written job description or a written volunteer policy would increase the VMOS.



## 6.10 National Railway Museum, York

The National Railway Museum is a branch of the National Museum of Science and Industry and as such it is publicly funded. The museum houses one of the most extensive collections of railway stock and memorabilia in Europe.

**Table 6.9 Management profile at the National Railway Museum**

Number of volunteers	120 volunteers, of which 50 are involved front-of-house, as information stewards and operating a miniature railway ride. One volunteer gives guided tours, although this was not in the original agreement with the trade union.	
How the programme developed	The front-of-house volunteer programme started in 1992.	
Volunteer coordinator	The Visitor Services Manager is responsible for all front-of-house volunteers. Volunteer supervision takes up around 15-20% of her time. The museum has just appointed a volunteer manager.	2
Volunteer policy	There is a written volunteer policy, agreed with the union representing paid staff at the museum.	2
Job development and design	There is a clear job description for front-of-house volunteers, who do different work from paid staff, and this was agreed with the union. Volunteers sign an agreement with the museum.	2
Recruitment	The Friends' newsletter, a press campaign when the miniature railway opened. "There is already a great interest and we have a constant trickle" (Visitor Services Manager). The Visitor Services Manager would rather recruit potential volunteers with people skills, rather than railway enthusiasts, as she states that she can teach volunteers about railways.	2
Interviewing and matching	There is an interview, and volunteers have to take exams to operate the miniature railway.	2
Orientation and training	"All are required to pass Welcome Host, which none have failed. Induction and knowledge about railways. There are 4 seminars a year and volunteers are required to attend at least one, we set them team objectives. We have a new budget to do Welcome All (disability awareness training)." (Visitor Services Manager). "Welcome-Host was very useful...feel more confident to direct visitors." (Volunteer). Volunteers must pass exams in order to qualify for driving the miniature railway: "Every possible bit of training so that we can carry out the job safely and competently." (Volunteer)	2

Supervision and motivation	“Hopefully front-of-house staff are assessed on a daily basis by the duty manager: have they arrived on time etc.” “They have spare time because they’re retired, although some are extremely busy. It’s a hobby, they can indulge their enthusiasm...they’ve now able to live a little dream by coming to the museum and being with the engines.” (Visitor Services Manager)	0
Recognition	The volunteer policy states that volunteers “...will be rewarded by such modest concessions as are felt to be reasonable.” These are in practice the same discounts in the shop and restaurant as paid staff “I think that’s very important that they get the same.” (Visitor Services Manager). “Discount in the restaurant and shop, free parking, free admission to the Science Museum and the Photography Museum, Bradford.” (Volunteer)	1
Evaluation	There is a committee for each team of volunteers, both the Information Stewards and the Miniature Railway drivers, and these committees meet every three months to discuss issues relevant to the volunteers.	2
Documentation	Names, addresses and training records held. This is particularly important for the volunteers who operate the miniature railway.	2
User evaluation	Visitor’s complaints are followed up. “We’re trying to move into this area and we’ll not be able to take it forward until we have more management to deal with it, and hopefully it will be volunteer managers who will take it on.” (Visitor Services Manager)	1

VMOS = 18

The National Railway Museum has a written volunteer policy which states that volunteers should be:

“Professionally guided, managed and controlled.”

Volunteers must sign an agreement that they will attend their shifts and inform the museum if they cannot. They will work under supervision and agree to undergo induction and ongoing training, as well as performance assessment. However, the Visitor Services Manager commented that there are not enough staff at the National Railway Museum to conduct appraisals for the volunteers. Volunteers are also required to give four weeks notice if they wish to discontinue their involvement with the museum. The volunteer policy sets out a maximum time contribution volunteers may make to the museum in any one year to approximately one day a week. This is in order

to limit the possibility of volunteers either taking over the role of paid staff, or appearing to. However, the Visitor Services Manager notes that the volunteers are giving their time freely and must be negotiated with, rather than told what to do:

“You’ve got to remember that they are coming here for nothing, but on the other hand you’ve got to have rules. At a big organisation you’ve got to have standards.”

Trade union involvement at the museum means that job descriptions are more important than at other case studies, as the volunteers’ roles need to be carefully prescribed. The only other case study, which discusses union negotiations is Brodsworth Hall, which is also the only other public sector organisation in this study. As at the National Museum of Science and Industry in London, where McIvor introduced a volunteer programme (see Appendix 1), the introduction of volunteers has been done with close consultation with the union. The volunteers have very specific roles, which have been agreed, and are separate from those of paid staff. Indeed, the volunteers perform strictly supplementary roles to the paid staff, which would otherwise not be done, and are able to add an extra dimension to the visitor experience. Members of staff work as explainers, moving around the galleries and providing interpretation rather than information. Volunteers can provide only non-teaching support.

The National Railway Museum is the only case that has fully applied the model for professional volunteer management, with a VMOS of 18. There is a written volunteer policy, job descriptions, volunteer agreements and volunteers receive regular training. The museum has just appointed a volunteer manager to supervise the volunteers and they receive carefully prescribed recompense, though not travel expenses. This case study also demonstrates the most explicit application of the economic model of volunteer involvement presented in this thesis.

### **6.11 Severn Valley Railway, Bewdley**

The Severn Valley Railway is a charitable trust, established by a group of volunteers in 1965. It is the third longest preserved steam railway in the UK. As with many of the other case studies, there are now paid staff, who manage the business side, although the railway itself is managed and maintained by volunteers. Volunteers are members of the board that manages the railway and of various operating committees.

**Table 6.10 Management profile at the Severn Valley Railway**

Number of volunteers	Never a constant figure. Approx. 1200, with approx. 250 working front-of-house.	
How the programme developed	Volunteers started the railway by getting together to preserve it after the Beeching cuts.	
Volunteer coordinator	There is a voluntary Volunteer Coordinator who has an assistant, also voluntary.	2
Volunteer policy	New volunteers must join the Severn Valley Railway, which is the Friends organisation, as this covers their insurance. They must sign up to the health and safety requirements and have a copy of the railway rulebook, an extensive manual covering every eventuality. A welcome pack and booklet for new volunteers is being written.	1 1
Job development and design	There are clear job descriptions for anyone involved in the operation of the railway.	2
Recruitment	Mostly volunteers offer their services.	0
Interviewing and matching	Potential volunteers are interviewed, asked for references, and have to pass exams for operational work.	2
Orientation and training	Training is taken very seriously because of the health and safety regulations governing a working railway. However, this varies from role to role, for example training can take 8-10 years for a part time volunteer engine driver, where as someone working on the ticket desk may only receive 'on the job' training. Indeed the level of training required by health and safety legislation is demonstrated by the 84% of respondents who had received some form of training: "Training on heritage railways is as stringent as a real railway, with health and safety and regular medicals. We are legally bound by the Transport and Works Act. There's a written exam and you learn the signal boxes and have to be passed out and examined the same as Railtrack." (Volunteer) This contrasts with the training offered a volunteer who works on the ticket desk: "They do have induction, but I missed it. It's probably just common sense."	2
Supervision and motivation	Volunteers involved in operating the railway are strictly supervised and a hierarchy exists, with the Guard in charge on the trains and the stationmaster at the stations.	2
Recognition	Volunteers receive expenses at some events, and free travel passes for the train when on duty: "Working volunteers get a free travel pass." (Volunteer)	1
Evaluation	Operational staff have to pass regular exams.	1
Documentation	Names, addresses and training records are held for volunteers involved in operating the trains.	2

User evaluation	Occasional visitor surveys. Unsolicited letters from visitors.	1
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VMOS = 17

As the Severn Valley Railway is managed as an operating railway, the management of volunteers is very professional and all health and safety regulations are adhered to, meaning that the case study has a high VMOS. Volunteers are members of the railway board and have an opportunity to influence decision-making within the organisation. However, this is not a deliberate attempt to introduce professional management procedures as outlined by McCurley and Lynch (McCurley & Lynch, 1998), but a response to stringent legal requirements, although there are plans to introduce more documentation for new volunteers, such as the welcome pack and booklet for new volunteers.

### **6.12 Cross-case analysis**

The National Railway Museum has the highest VMOS, at 18 (the most out of the ten case studies), and it does conform to the model of professional volunteer management, set out in Chapter Three. However, Fountains Abbey, Knole and the Severn Valley Railway also had high scores. It is notable that two of these case studies – the National Railway Museum and the Severn Valley Railway – are governed by stringent health and safety legislation. In contrast, two case studies which have a moderate VMOS, Amberley Museum and Avoncroft Museum of Buildings, have limited the role of volunteers over the years in order to comply with health and safety legislation. Moreover, the need for references was stated at Fountains Abbey, in order to comply with legislation, such as for volunteers who may be involved in children's activities. Thus, external influences have been very important in the introduction of more professional volunteer management procedures.

Many of the other case studies follow professional volunteer management procedures to some extent and Fountains Abbey, Amberley Museum, Avoncroft Museum of Buildings, the Yorkshire Sculpture Park, the National Railway Museum and the Severn

Valley Railway all stated that their intention is to introduce more structured volunteer management in the near future.

All the case studies were clear in making a distinction between the roles of paid staff and of volunteers. At Brodsworth Hall, the Cutty Sark, the National Railway Museum and the Severn Valley Railway volunteers were clearly involved in supporting roles and paid staff dealt with money transactions. However, this did not mean that their volunteer policy was based around a leisure model. Indeed, at both Knole and Kinver, managers talked of their frustration with volunteers who did not know that their role was to help the National Trust and that they had overstepped this in making their own decisions. In contrast, both Museum Directors at Amberley Museum and Avoncroft Museum of Buildings commented that the volunteer experience is different from that of paid staff and this was the volunteers' strength in front-of-house activities, as they were more enthusiastic than paid staff.

Amberley Museum and Avoncroft Museum of Buildings were both established by volunteers and may be expected to have a less managerial approach. However, the National Trust case studies do not entirely adhere to the National Trust policy on volunteering. For example, at Knole, travel expenses are not in line with the National Trust's policy, while Kinver does not offer expenses at all. With the exception of the Severn Valley Railway's stringent health and safety policy, it is the two public sector case studies, Brodsworth Hall and the National Railway Museum, which have the strictest guidelines on involving volunteers. The reasons for this appear to be twofold. Firstly, both organisations have to deal with trade unions and must ensure that volunteers are not replacing paid staff. Secondly, at the National Railway Museum the aim is to maintain customer care standards, which seems to contradict the Visitor Services Manager's comment that this provides a hobby for the volunteers.

The surveys reported in Chapter Two enable the data from the ten case studies to be compared with the involvement of volunteers across the wider heritage sector. The respondents to the 1998 survey stated that their main reasons for involving volunteers were that they undertook tasks that would otherwise not be done or that the volunteers worked on specific projects. Since three of the case studies were founded by volunteers (Amberley Museum, Avoncroft Museum of Buildings and the Severn Valley Railway)

and the opening of the rock houses at Kinver was also a volunteer-led initiative, volunteer involvement was fundamental to the existence of these organisations, rather than a conscious decision to set up a volunteer programme. Seven of the case studies, Fountains Abbey, Knole, Kinver, Brodsworth Hall, Amberley Museum, Avoncroft Museum of Buildings and the Severn Valley Railway, stated that financial limitations meant the involvement of volunteers was necessary. Five of the case studies, Kinver, Brodsworth Hall, the Yorkshire Sculpture Park, the Cutty Sark and the National Railway Museum involved volunteers on specific projects or in only one role.

The managerial respondents to the Mattingly, 1984 and repeated, 1998 surveys (Mattingly, 1984; Holmes, 1998) stated that they believed volunteers primarily offered their services because of interest in the subject, which was only mentioned by the Visitor Services Managers at the Cutty Sark and the National Railway Museum. The second most important reason, aside from work experience, was to support the museum, which was given as a reason by the Estate Warden at Kinver and the Museum Director at Amberley Museum. This was also implied by the Volunteer Coordinator at the Yorkshire Sculpture Park, who noted that the people who volunteered had a propensity to help, which was related to their generation. Only at Brodsworth Hall and Avoncroft Museum of Buildings was it suggested that enjoyment of the activities was the main motivator for volunteers. This corresponds to the responses given by volunteers to the BAFM and National Trust surveys (Davis Smith & Chambers, 1997; BAFM, 1998). The high proportion of retired volunteers was noted by the Volunteer Coordinator at the Yorkshire Sculpture Park and the Visitor Services Managers at both the Cutty Sark and the National Railway Museum. Indeed the Visitor Services Manager at the Cutty Sark stated that volunteering was a means for the volunteers to keep active in retirement.

The economic model is evident even at organisations where volunteers are able to manage themselves, for example, at the Severn Valley Railway. However, in this case it is the result of external influences in the form of health and safety requirements. Since the Severn Valley Railway must be run as a professional railway operation, it should not be surprising that the volunteers are managed as professional staff doing a professional job. The VMOS scoring system means that it would be difficult for a case study to score nothing and the ad hoc procedures – or lack of procedures – at such a case would not benefit the volunteers. For example, this would require that they receive no training

whatsoever and receive no recompense for their activities. However, four of the case studies had a high VMOS and others had plans to introduce new procedures, which are likely to increase their score. This is even while acknowledging that existing volunteers have been resistant to a more structured approach, for example at Fountains Abbey and Knole.

Although a completely unstructured programme may be disadvantageous to volunteers, the benefits of a structured programme appear to be assumed or else result from negotiations with paid staff or their representatives. Thus, volunteers are increasingly managed along the economic model, with little concern for the impact this may have on their motivation. However, the reasons for adopting the economic model seem largely the result of external pressures, such as needing to conform to health and safety requirements at the National Railway Museum and the Severn Valley Railway or the need to accommodate trade unions, again at the National Railway Museum and at Brodsworth Hall.

### **6.13 Chapter summary**

This chapter presented the volunteer programmes at the ten case studies and compared the management procedures with professional volunteer management as set out in Chapter Three by McCurley and Lynch (McCurley & Lynch, 1998). A scoring system using McCurley and Lynch's model was proposed, giving a Volunteer Management Orientation Score. This provided a quantitative way of comparing the management programmes across the very different case studies. The case studies varied in their application of professional procedures, but most noted their intention to introduce a more structured programme. The main reasons for introducing more professional management procedures are largely a response to external pressures. The ten case studies were also compared with the surveys presented in Chapter Two. The next chapter presents the analysis of the volunteer and visitor interviews.



## Chapter 7: Motivating Volunteers

### 7.1 Introduction

The previous chapter introduced the ten case studies and examined the management context using data from management interviews, documents and volunteer interviews. This chapter reports on both the quantitative and qualitative data analysis of the volunteers at each case study, presenting a sample profile and analysing their responses and those of the visitors.

### 7.2 Volunteer sample profile

The following tables, Tables 7.1-7.6, summarise the characteristics of the volunteer respondents across the ten case studies.

**Table 7.1 Volunteers' gender by case study**

	Male (%)	Female (%)	<i>Number of respondents</i>
Fountains Abbey	48	52	23
Knole	34	66	33
Kinver	55	45	11
Brodsworth Hall	28	72	30
Amberley Museum	80	20	10
Avoncroft Museum of Buildings	76	24	21
Yorkshire Sculpture Park	50	50	6
Cutty Sark	69	31	16
National Railway Museum	95	5	27
Severn Valley Railway	96	4	19
<b>Total</b>	<b>60</b>	<b>40</b>	<b>199</b>

As noted in Chapter Five, the gender ratios vary across the case studies, see Table 7.1, as was expected from the review of previous research in Chapter Two (Mattingly, 1984; Holmes, 1999). In particular, four case studies, Amberley Museum, Avoncroft Museum of Buildings, National Railway Museum and the Severn Valley Railway, clearly appealed more to male than female volunteers and this has resulted in a greater proportion of male than female respondents. Table 7.2 shows the older age bias of the sample, again as expected from the review of previous research in Chapter Two. Only at Avoncroft Museum of Buildings is the modal age group for volunteers under the statutory age for retirement, at 45-54 years. However, this must reflect early retirement,

since 60% of respondents at Avoncroft were retired, while only 35% were aged over 60 years, the minimum statutory age of retirement for women (the statutory retirement age for men is 65 years). Table 7.3 confirms the older age of the sample by showing that 75% of respondents were retired. This is again consistent with the characteristics of respondents to the surveys reported in Chapter Two. Overall, as noted in Chapter Five, the respondents show similar characteristics of gender, age and work status as the respondents to the previous surveys discussed in Chapter Two. Moreover the volunteers also display a high level of educational attainment (Table 7.4), in comparison to the current proportion of the UK population holding a university degree or higher, which is 16% for men and 13% for women (Matheson & Summerfield, 2001). This is particularly significant given that the majority of respondents are aged 60 years or above, and therefore had less access to many of the qualifications listed in Table 7.4. Indeed, while educational attainment is only one element in designating an individual's social class (Rose & O'Reilly, 1997), it is indicative of higher socio-economic status, which again correlates with the data from previous studies of volunteers, as reported in Chapter Two, both within the heritage sector (Mattingly, 1984 & Holmes, 1999) and across the wider voluntary sector (Davis Smith, 1997). Finally, Table 7.5 shows the length of service given by volunteers. For this study any volunteer with three or more years service is considered a long-serving volunteer. In particular, it is notable that even at Brodsworth Hall, which had only been open for four seasons when the fieldwork was conducted, the majority of respondents were long-serving and had been involved since the property opened. As well as long-serving volunteers, all case studies had volunteers who had been involved for less than a year. In the case of Knole there was a clear polarisation between long serving volunteers, with more than ten years service, and those who had been involved for less than six months, reflecting their recent recruitment drives (see Chapter Six). This means that each case study has respondents who should be able to remember their initial motives quite clearly and any differences between motivations in short-serving and long-serving volunteers can be examined.

**Table 7.2 Volunteers' age group by case study**

	<b>18-24 years (%)</b>	<b>25-34 years (%)</b>	<b>35-44 years (%)</b>	<b>45-54 years (%)</b>	<b>55-59 years (%)</b>	<b>60-64 years (%)</b>	<b>65-74 years (%)</b>	<b>75 years and over (%)</b>	<b><i>Number of respondents</i></b>
Fountains Abbey	0	0	0	13	13	17	56	0	23
Knole	3	0	3	3	10	24	35	21	29
Kinver	9	0	0	18	18	9	18	27	11
Brodsworth Hall	0	0	3	6	19	31	44	0	30
Amberley Museum	22	11	0	11	0	11	11	33	9
Avoncroft Museum of Buildings	10	0	0	45	10	15	20	0	20
Yorkshire Sculpture Park	0	0	0	0	17	50	17	17	6
Cutty Sark	7	0	0	27	7	27	20	13	15
National Railway Museum	4	4	8	27	4	35	19	0	26
Severn Valley Railway	6	0	0	18	18	41	12	6	17
<b><i>Total</i></b>	<b>5</b>	<b>1</b>	<b>2</b>	<b>17</b>	<b>12</b>	<b>26</b>	<b>29</b>	<b>8</b>	<b>186</b>

**Table 7.3 Volunteers' work status by case study**

	<b>Full-time education (%)</b>	<b>Looking after the house (%)</b>	<b>Working full-time (%)</b>	<b>Working part-time (%)</b>	<b>Unemployed (%)</b>	<b>Retired (%)</b>	<i>Number of respondents</i>
Fountains Abbey	0	5	5	9	0	81	<i>21</i>
Knole	0	12	9	3	0	75	<i>32</i>
Kinver	9	9	9	0	0	73	<i>11</i>
Brodsworth Hall	0	5	3	0	3	85	<i>30</i>
Amberley Museum	10	0	20	0	0	70	<i>10</i>
Avoncroft Museum of Buildings	9	0	5	17	9	60	<i>21</i>
Yorkshire Sculpture Park	0	0	0	11	11	78	<i>9</i>
Cutty Sark	6	6	0	12	6	69	<i>16</i>
National Railway Museum	0	0	28	7	0	65	<i>27</i>
Severn Valley Railway	5	0	5	5	0	84	<i>19</i>
<b><i>Total</i></b>	4	5	9	6	3	75	<i>196</i>

**Table 7.4 Volunteers' educational attainment by case study**

	<b>None (%)</b>	<b>School certificate (%)</b>	<b>GCSE/ CSE/ O-Levels (%)</b>	<b>A-levels/ BTEC (%)</b>	<b>HND/ HNC (%)</b>	<b>Degree (%)</b>	<b>Postgraduate qualification (%)</b>	<b>Professional qualification (%)</b>	<b>Number of respondents</b>
Fountains Abbey	6	6	0	18	18	29	12	12	17
Knole	5	13	9	30	9	24	5	5	27
Kinver	0	9	9	27	9	18	0	27	11
Brodsworth Hall	6	2	12	4	0	24	10	42	24
Amberley Museum	0	14	14	29	29	14	0	0	7
Avoncroft Museum of Buildings	6	17	28	11	17	11	0	11	21
Yorkshire Sculpture Park	0	17	17	0	0	17	33	17	6
Cutty Sark	12	12	6	0	6	50	6	6	16
National Railway Museum	0	11	15	18	15	15	11	15	27
Severn Valley Railway	6	12	37	12	6	6	6	12	16
<b>Total</b>	5	15	13	14	10	16	8	17	172

**Table 7.5 Volunteers' length of service by case study**

	<b>Less than 6 months (%)</b>	<b>6 months- 1 year (%)</b>	<b>2 years (%)</b>	<b>3 years (%)</b>	<b>4 years (%)</b>	<b>5 years (%)</b>	<b>6-10 years (%)</b>	<b>More than 10 years (%)</b>	<i>Number of respondents</i>
Fountains Abbey	0	9	9	9	0	18	37	18	22
Knole	24	3	18	6	0	6	9	33	33
Kinver	10	43	8	8	8	19	0	0	11
Brodsworth Hall	6	6	0	28	59	0	0	0	24
Amberley Museum	0	20	0	0	10	0	30	40	10
Avoncroft Museum of Buildings	9	0	24	24	0	5	19	19	21
Yorkshire Sculpture Park	0	40	0	0	0	20	40	0	5
Cutty Sark	13	20	7	13	20	7	20	0	15
National Railway Museum	0	7	18	15	11	11	26	11	27
Severn Valley Railway	10	5	0	0	16	0	21	47	19
<b>Total</b>	<b>9</b>	<b>10</b>	<b>10</b>	<b>13</b>	<b>15</b>	<b>7</b>	<b>17</b>	<b>19</b>	<b>187</b>

Table 7.6 Volunteers' occupations by case study

<b>Fountains Abbey</b>	The volunteers held, or had held before they retired, mainly professional and managerial occupations, including five teachers, a research scientist, librarian and architect. <i>N</i> = 19
<b>Knole</b>	The volunteers listed a combination of clerical and professional occupations including two clerks, five secretaries, two teachers and a variety of office-based jobs. This is likely to reflect the high proportion of retired females among the sample. <i>N</i> = 24
<b>Kinver</b>	Respondents listed a range of skilled and managerial occupations including engineer, council officer, nurse, architect, police officer and farmer. <i>N</i> = 11
<b>Brodsworth Hall</b>	Volunteers listed mostly professional occupations, with six teachers, a doctor, two nurses and three engineers. However, these also included a farmer's wife, four secretaries and a school cook. <i>N</i> = 27
<b>Amberley Museum</b>	There was no pattern among the occupations reported by the volunteers at Amberley. However, only five respondents answered this question. Their responses were postal worker, office manager, procurement officer, lab technician and carpenter. <i>N</i> = 5
<b>Avoncroft Museum of Buildings</b>	There was a polarisation among the volunteers' occupations. Of the 12 volunteers who answered this question, four listed their occupation as teacher or lecturer, three were students, including one mature student and one who had stayed on at the museum after a work placement. In contrast, a former telephone engineer and an electrician stewarded the telephone box collection. <i>N</i> = 12
<b>Yorkshire Sculpture Park</b>	As only seven respondents answered this question it is difficult to draw a pattern. However, four respondents listed professional occupations of teacher, nurse, engineer and psychiatrist; two worked in clerical occupations and one was a former paid warden at the Yorkshire Sculpture Park. <i>N</i> = 7
<b>Cutty Sark</b>	The volunteers responding to this question listed an eclectic range of occupations from post office manager to nurse. Two had been involved in shipping during their working lives, one as a sailor and the other in the merchant navy. <i>N</i> = 11
<b>National Railway Museum</b>	The volunteer respondents listed a combination of professional occupations, including police officer, teacher, civil servant and librarian, as well as transport related jobs, including seven engineers, a railway executive and two vehicle technicians. <i>N</i> = 22
<b>Severn Valley Railway</b>	The Severn Valley Railway attracted volunteers from a range of occupations. These included some professional workers, such as a senior lecturer, an accountant and a banker, but also manual workers including a gardener, a gas technician and a joiner. <i>N</i> = 14

### 7.3 Volunteers' initial motivation

The reasons given by volunteers for initially offering their services are analysed separately to their expectations.

Volunteers' reasons for offering their services (Question 2)

The results of the content analysis for volunteers' initial motivation is presented in Table 7.7 The most frequently cited reason for initially volunteering was *subject interest*. This was the case for all the organisations:

“I wanted to learn about art and the history and be with people. I'm even learning French as there's quite a few French people.” (Volunteer, Knole)

“I've always had a love of history and the year before I retired they were advertising for volunteers. I thought it would be nice.” (Volunteer, Brodsworth Hall)

“A lifelong love of all things railway and a wish to get more involved.” (Volunteer, National Railway Museum)

“Interest in railways, best steam railway in the country and company.” (Volunteer, Severn Valley Railway)

*Keeping active in retirement* was also cited by many of the volunteers:

“I'm retired so I've plenty of time and it seemed a nice thing to do – meeting people and something different.” (Volunteer, Fountains Abbey)

Retirement is discussed further in 7.9.

*Social opportunities* and *helping the organisation* or *doing something worthwhile* were both cited 16 times:

“[I was] immediately attracted to the peaceful/relaxing surroundings, friendliness of the staff and other volunteers and feeling of being accepted.” (Volunteer, Avoncroft Museum of Buildings)

“I liked the National Trust and it is worthwhile.” (Volunteer, Knole)

Volunteers listed other prompts, for example seeking work experience or seeking enjoyment and recreation, though these were less commonly cited as reasons for volunteering compared to the others discussed above:

“A work experience scheme through the job centre, since disbanded.” (Volunteer, Cutty Sark)



“The enjoyment and experience I would gain.” (Volunteer, National Railway Museum)

The number of citations of *local* as a prompt, shows that the proximity of the organisation to where the volunteer lives is also important. Clearly, if someone is going to be persuaded to give their services for free, then the process must be made as simple as possible. This is particularly evident at Brodsworth Hall, where volunteers stated that they had wanted to volunteer at a country house prior to the hall opening, but there had been nowhere suitable:

“I was always a member of the National Trust and since none are nearby this is the next best thing”

“There’s nowhere else to volunteer.”

What is clear from the above comments is that volunteers were often motivated by more than one reason. However, the dominance of interest as a motive shows that intrinsic motivation is very significant in attracting volunteers. The manager respondents to the surveys in Chapter Two both cited subject interest as the main reason why volunteers had offered their services (Mattingly, 1984; Holmes, 1999), while the volunteer respondents had both stated that they wanted to do something they enjoyed (Davis Smith & Chambers, 1997; BAFM, 1998). However, it would be fair to suggest that *subject interest* and *enjoyment* are closely related. Noticeably helping the organisation or doing something worthwhile featured as the second most important reason for the survey respondents in Chapter Two, both for the volunteers and the managers. However, these were less cited reasons for the volunteers at the case studies. Indeed it might be expected that volunteers at charitable organisations, such as the respondents to the National Trust survey in Chapter Two, might be more likely to cite pro-social reasons. Yet, while this is the case for Knole and Amberley Museum, which are both charitable organisations, this is also the case for the National Railway Museum, a museum funded from public money and this was not cited at all by volunteers at other charitable case studies, including Kinver and Avoncroft Museum of Buildings.

**Table 7.7 Volunteers' reasons for initially volunteering**

	Challenge	Comfortable/ surroundings	Enjoyment/ recreation	Help/ do something worthwhile	Keep active in retirement	Learning/ new skills	Local	Pursue Interest	Social opportunities	Work	Work experience
<b>Fountains Abbey</b>	1	1	2	2	9	1	4	3	3	1	
<b>Knole</b>	1			4	3		4	12	3		1
<b>Kinver</b>								8	1	1	1
<b>Brodsworth Hall</b>					5		7	14	3		
<b>Amberley Museum</b>				3				5		1	
<b>Avoncroft Museum</b>			2		6			4		1	2
<b>YSP</b>		1	2		1			3		2	
<b>Cutty Sark</b>				1			2	7			4
<b>NRM</b>			1	5	2			17	4		
<b>SVR</b>				1	2			16	3		
<b>Total</b>	2	2	7	16	28	1	17	89	17	6	8

**YSP = Yorkshire Sculpture Park**

**NRM = National Railway Museum**

**SVR = Severn Valley Railway**

'I had time to spare' was the third most cited reason by volunteers in the BAFM and National Trust surveys. Since a large proportion of these respondents were retired, this motive could be correlated to an extent with keeping active in retirement. Social motives featured significantly among the case study volunteers as with the respondents to the surveys in Chapter Two. That is, it was an important reason but not the most important factor in prompting volunteers to offer their services.

Thus, aside from the lower rating of pro-social motives, the volunteers from the case studies gave similar reasons to the volunteer respondents to the surveys reported in Chapter Two. Overall, intrinsic motives were the most significant for volunteers initially offering their services. This corresponds with previous research on volunteer motivation by Pearce, Lapham and Thomas, who proposed that volunteers were primarily intrinsically motivated (Pearce, 1987; Lapham, 1988; Thomas, 2000)

Volunteers' expectations (Questions 6 and 7)

Table 7.8 presents the results of the content analysis of volunteers' expectations. Volunteers' expectations contrast with their reasons for offering their services, in that *social opportunities* overtakes subject interest as the most frequently cited reason. Indeed *subject interest* slips behind *opportunity to learn* and *helping the organisation*. However, since *opportunity to learn* is clearly linked to *subject interest*, this is less significant than Table 7.8 suggests:

"An interesting hobby. Learning about a Victorian house and also about the furniture." (Volunteer, Brodsworth Hall)

*Social opportunities* covers a range of social motives, however the key word *colleagues* refers to any comment specifying making new friends or meeting likeminded people, rather than the more simple case of wanting to meet people. *Colleagues* was cited 15 times in addition to the 47 citations of *social opportunities*:

"Companionship since my wife died, always on a Wednesday." (Volunteer, Amberley Museum)

"Meeting many different people of all ages and sharing experiences." (Volunteer, Avoncroft Museum of Buildings)

“The people here were so enthusiastic. It was something new and therapeutic”  
(Volunteer, Yorkshire Sculpture Park)

“Sharing my enthusiasm and interest in clipper ships with visitors.” (Volunteer, Cutty Sark)

“I thought I would meet similar people. This is my main leisure interest and my wife never shared it.” (Volunteer, National Railway Museum)

“To work with steam trains and meet likeminded people.” (Volunteer, Severn Valley Railway)

*Belonging* was cited as frequently as *colleagues*. *Belonging* has a link with *social opportunities* as it refers to feeling part of an organisation or team:

“To be involved in the estate and meet people.” (Volunteer, Fountains Abbey)

However, it also includes comments related to identifying with an organisation, as in this case:

“I like to identify with the best. Severn Valley is the best, especially for signalling. It’s the most sophisticated and the best in the country, if not the world.”  
(Volunteer, Severn Valley Railway)

Pro-social motives were the second most frequently cited after social opportunities:

“To contribute to the National Trust in return for the pleasures I have had visiting other houses.” (Volunteer, Knole)

“To support the venture and help repay many years of enjoyment on the Edge”  
(Volunteer, Kinver)

“Helping the museum function successfully” (Volunteer, Avoncroft Museum of Buildings)

“Doing something worthwhile and unique for the museum.” (Volunteer, National Railway Museum)

Two of the National Trust sites, Fountains Abbey and Knole, *helping the organisation* or *doing something worthwhile* were the most frequently cited expectations, which does correlate with the National Trust survey in Chapter Two, whose respondents listed ‘helping the National Trust’ as the second most important reason for volunteering. Yet, again volunteers at the National Railway Museum cited pro-social motives frequently. This hints at a link between subject interest and pro-social motives. An individual is

likely to consider an activity which will further their interest or assist the area they are interested in to be *doing something worthwhile*.

Thus, as with volunteers' initial reasons for volunteering, volunteers' expectations were a combination of intrinsic motives: wanting to help the organisation; wanting to learn; seeking enjoyment; but opportunities to meet people and make friends were also important.

**Table 7.8 Volunteers' expectations**

	Belonging	Challenge	Colleagues	Enjoyment/recreation	Help/ do something worthwhile	Identify with	Keep active in retirement	Learning / new skills	Personal effort	Pursue Interest	Social opportunities	Satisfaction	Work	Work experience
<b>Fountains Abbey</b>	2		1		9		2	2		2	7		2	
<b>Knole</b>	2		3	4	8		3	7	1	8	7		1	
<b>Kinver</b>	1			1	2			1		2	2		1	
<b>Brodsworth Hall</b>		2	2	1				8		5	5			
<b>Amberley Museum</b>			1	1	2		1				1	3	1	
<b>Avoncroft Museum</b>	2	1		2	2			1			6		2	
<b>YSP</b>	2	1	2	1	3	1		4	1		3			
<b>Cutty Sark</b>			1	2	3			2		1	5			2
<b>NRM</b>	4		2	4	7			9		4	5			
<b>SVR</b>	2		3	2	4	1	2			5	6	1		
<b>Total</b>	15	4	15	18	40	2	8	34	2	27	47	4	7	2

YSP = Yorkshire Sculpture Park  
 NRM = National Railway Museum  
 SVR = Severn Valley Railway

#### 7.4 Volunteers' continuing motivation

The content analysis of volunteers' reasons for continuing to volunteer (Question 16) is presented in Table 7.9. *Social opportunities* is by far the most cited reason by the volunteers for continuing to offer their services. *Colleagues* is the third most cited reason,

"There's a nice lot of people here, no one's been coerced, everyone's come forward and it's lovely to see someone surprised and pleased about it." (Volunteer, Kinver)

"I enjoy meeting the different people. It's something different, I can't put my finger on it." (Volunteer, Brodsworth Hall)

"Social occasion with other blokes." (Volunteer, Cutty Sark)

"The friendly atmosphere, nearly all the volunteers are regular Thursday volunteers. The more you learn the more you enjoy." (Volunteer, Brodsworth Hall)

"Feeling that I am part of a splendid team." (Volunteer, Yorkshire Sculpture Park)

However, *enjoyment and recreation* are cited almost as frequently.

"I enjoy it. It's a big boys playground, a hobby like golf." (Volunteer, Amberley Museum)

"I enjoy railways, I enjoy the Severn Valley Railway. It also feels nearer to God on the Severn Valley Railway because you're closer to nature." (Volunteer, Severn Valley Railway)

Learning and developing skills were both listed 23 times, along with *helping the organisation* and *doing something worthwhile*.

"I'm getting to know the permanent staff. We're one big happy family and I'm acquiring knowledge." (Volunteer, National Railway Museum)

"I don't come here for what I can get out. I expect personal satisfaction. It's a worthwhile organisation, I enjoy visiting it anyway and I can help to keep it open." (Volunteer, Avoncroft Museum of Buildings)

Thus, both general social opportunities, such as meeting people and specifically meeting friends, were by far the most listed reason, overtaking subject interest and helping the organisation. Noticeably, *colleagues* scored highly among respondents at Brodsworth

Hall. This may well reflect the comparatively recent opening of the property, meaning that volunteers began at similar times and were able to get to know each other better. This contrasts with Knole, where the Property Manager believed that newer volunteers might be discouraged from joining an already established social group. Since enjoyment was rated as the most important motivator in the BAFM and National Trust surveys reported in Chapter Two, it is no surprise that this features so highly as a motivator among the respondents from the case studies. Indeed *enjoyment* was cited several times by respondents at all ten case studies.

Helping the organisation scored second highest at Kinver, Avoncroft Museum of Buildings, the Yorkshire Sculpture Park and the Severn Valley Railway. This is a change from the scorings in this category as a reason for initially volunteering. All these organisations are charitable trusts, though so are some of the other case studies, where respondents did not even cite *helping the organisation* as a motive. While all the volunteers at the Yorkshire Sculpture Park are first members of the Friends organisation and therefore are likely to wish to support the park before even volunteering, at Kinver, Avoncroft and the Severn Valley Railway these responses are perhaps indicative of a volunteer developing a close attachment after time spent at the place. This contrasts with the proposed theory of this thesis, which is that volunteers become more self-oriented in their motives, rather than pro-social, the longer they volunteer. However, if *colleagues* and *social opportunities* are combined they remain the most frequently cited motive at all ten case studies.

In addition to being asked why they continue to volunteer, respondents were also asked why they fulfil their shift every week, since (except at the National Railway Museum) they are not under contract (Question 33). The responses to this question were analysed separately and are presented in Table 7.10. While *social opportunities* and *colleagues*, when combined, were still the most cited reasons, *commitment* and *enjoyment and recreation* were both frequently given as motives:

“I enjoy it. You don’t do it unless you enjoy it. Large numbers of hours are given freely and I imagine they couldn’t manage without us. I think the Trust knows that and appreciates it. You don’t want to let them down.” (Volunteer, Fountains Abbey)



“I enjoy it. I wouldn’t do it if I didn’t enjoy it. I’m unpaid so I wouldn’t do it.”  
(Volunteer, Knole)

“Knowing that you’re going to have a lovely time. This museum is part of me and my wife comes and helps as well.” (Volunteer, Amberley Museum)

“It’s very pleasant. It’s a regular commitment. I like to give something back to society, perhaps I’m the sort of person who does voluntary work.” (Volunteer, Avoncroft Museum of Buildings)

“Knowing that I am going to have a challenging day but that I will enjoy it.”  
(Volunteer, Yorkshire Sculpture Park)

“Because I know that I will enjoy my work and there will never be a dull moment.” (Volunteer, National Railway Museum)

“I love what I’m doing, it’s a joy never a chore.” (Volunteer, Severn Valley Railway)

Many volunteers have also cited *commitment* as their reason for continuing the volunteer. In some cases this is commitment to the organisation:

“I’ve undertaken to be at the museum and I won’t let it down without a good reason.” (Volunteer, National Railway Museum)

“Loyalty to the National Trust. I wouldn’t want to let anyone down.” (Volunteer, Knole)

And in others this is commitment to colleagues:

“I am expected at Avoncroft Friday and Saturday. I don’t like letting people down.” (Volunteer, Avoncroft Museum of Buildings)

“Loyalty to fellow workers.” (Volunteer, Brodsworth Hall)

In addition, some volunteers do not specify:

“I have a moral obligation to come, except if illness prevents.” (Volunteer, Fountains Abbey)

“It’s your duty. You can’t volunteer and not turn up.” (Volunteer, Severn Valley Railway)

**Table 7.9 Why volunteers continue to offer their services**

	Belonging	Challenge	Colleagues	Commitment	Comfortable/	Enjoyment/recreation	Help/do something worthwhile	Keep active in retirement	Learning/ new skills	Interest	Satisfaction	Self-development	Social opportunities	Work
<b>Fountains Abbey</b>				1	7	10	2	3	3		6		9	
<b>Knole</b>			4	2		3		1	6	2	5		11	
<b>Kinver</b>	2		1			2	4			2			3	1
<b>Brodsworth Hall</b>	2	2	13		4	7		4	1		1		10	3
<b>Amberley Museum</b>	1	1	1	3	1	3				4				2
<b>Avoncroft Museum</b>			1			7	4	2	4	1		4	6	1
<b>YSP</b>	1		2			4	5		1				4	1
<b>Cutty Sark</b>	2		3			4				2	4		6	
<b>NRM</b>	2	4	2		1	8	2	1	8	3		1	5	4
<b>SVR</b>	1		3		1	3	6				5		5	3
<b>Total</b>	11	7	30	6	14	51	23	11	23	14	21	5	59	15

YSP = Yorkshire Sculpture Park  
 NRM = National Railway Museum  
 SVR = Severn Valley Railway

**Table 7.10 Volunteers' motivation**

	Belonging	Challenge	Colleagues	Comfortable	Commitment	Enjoyment/ recreation	Help/ do something worthwhile	Keep active in retirement	Learning/ new skills	Pursue Interest	Social opportunities	Work
<b>Fountains Abbey</b>			1	5	5	3	6	2		1	2	
<b>Knole</b>		1	1	2	5	4	5	4	3	2	2	
<b>Kinver</b>	1				5	1	2	1			1	
<b>Brodsworth Hall</b>		2	6	3	3	4	3		3	2	5	2
<b>Amberley Museum</b>			2		4	2					3	1
<b>Avoncroft Museum</b>			1	1	5	5		4	1		1	
<b>YSP</b>		3		3	3	2				4		
<b>Cutty Sark</b>			3			2	1	2	1		5	1
<b>NRM</b>		3	1		3	5			3		6	3
<b>SVR</b>			1		5	6	1	1		3	1	1
<b>Total</b>	1	9	16	14	38	34	18	14	11	12	26	8

YSP = Yorkshire Sculpture Park  
 NRM = National Railway Museum  
 SVR = Severn Valley Railway

The Oxford English Dictionary defines commitment as:

“1. An engagement or (Esp. financial) obligation that restricts freedom of action;  
2. The process or an instance of committing oneself; a pledge or undertaking.”  
(Hawkins & Allen, 1994)

The first statement suggests that commitment might be restrictive, which suggests that volunteering is like work. The second statement suggests a less work-like form of commitment. Clearly the number of volunteers citing their commitment suggests this is not a casual activity and managers need not worry unduly about unreliable volunteers (Pearce, 1993). Moreover this also shows that commitment does not rely on contracts or financial recompense. Serious Leisure, discussed in more detail below, requires an element of commitment (Stebbins, 1992). This will be discussed further in 7.7.

### **7.5 Changing motivation?**

Previous research reviewed in Chapter Three (Ilsley, 1990; Pearce, 1993) suggested that volunteers' motivations changed over time, with length of service. Respondents had all been assigned a code and the motivations of those serving less than three years were compared with long-serving volunteers. In addition, any volunteer who had stated that their initial reason for volunteering was work-related, for example in order to gain work experience, was examined in relation to the other respondents at each case study.

Across the ten cases, two characteristics of short-serving volunteers were noted. Firstly, they tended to cite the means by which they had been recruited as their reason for initially offering their services:

“I received a letter, they had targeted our postcode...” (Volunteer, Knole)

“An article in our local evening paper.” (Volunteer, National Railway Museum)

Secondly, many respondents cited retirement as the reason for initially offering their services. This was particularly the case at Fountains Abbey and Avoncroft Museum of Buildings. Indeed, a small number of respondents suggested that this was the first opportunity they had for volunteering:

“I retired at Easter and felt this would be interesting. I have always been interested in history.” (Volunteer, Brodsworth Hall)

“Been a member since 1972, other interests meant not been able to volunteer full-time before.” (Volunteer, Severn Valley Railway)

As noted in 7.2, at Knole there is a polarisation between long-serving volunteers and recent recruits. While some of the newer volunteers listed pro-social motives among their expectations, this was not unanimous and the small number means that no firm conclusions can be drawn. Moreover, only one of these new volunteers listed *helping the organisation* as their reason for continuing to volunteer. Subject interest and learning were more commonly cited. At Kinver one volunteer had stated that they were seeking work experience, but as with Knole, their cited reasons for continuing to volunteer were no different from volunteers motivated by subject interest or the opportunity to develop social contacts:

“The chance I might meet interesting people” (Volunteer, Kinver)

At Avoncroft, two of the volunteers stated that they were using their volunteering in order to prepare them for the work place after long-term sick leave. While one of these respondents suggested that they have an obligation to fulfil their shift:

“I don’t like letting people down, they are expecting you here.” (Volunteer, Avoncroft Museum of Buildings)

This is not supported by the other volunteer, who states:

“ I look forward to enjoying myself.” (Volunteer, Avoncroft Museum of Buildings)

The unusual case of paying some volunteers at Avoncroft Museum of Buildings raised the issue of whether paying volunteers even this small amount changes the relationship between the volunteers and the organisation to one akin to paid staff. The volunteers who receive this allowance are all seasonal volunteers, in that they come in and help at busy times of the year. The seasonal volunteers tend to work in the shop, café and ticket desk, and the first three exhibits to be staffed were manned by seasonal volunteers. In other words, the seasonal volunteers are those who do essential roles where the museum needs to guarantee that someone will come in:

“So you have volunteers and paid people working side by side and it always amazes me how well that works...but it has always been accepted that there are slightly different roles.” (Museum Director, Avoncroft Museum of Buildings)

One of the respondents who received this allowance did state:

“I am expected at Avoncroft Friday and Saturday. I don’t like letting people down.” (Volunteer, Avoncroft Museum of Buildings)

However, another stated that:

“They didn’t expect to get paid” (Volunteer, Avoncroft Museum of Buildings)

While yet another cited their reason for continuing to volunteer as:

“I really love being here, the atmosphere, also gleaning knowledge from visitors, the only chance to talk to the biggest range of visitors.” (Volunteer, Avoncroft Museum of Buildings)

It seems that the allowance may be too small to appear as anything more than the repayment of out-of-pocket expenses:

“I get £1.42 an hour, but really you work for free.” (Volunteer, Avoncroft Museum of Buildings)

At the Yorkshire Sculpture Park, three of the respondents used to be paid members of staff. While one of these volunteers mentions they have “a sense of duty” towards the park, all three cite *belonging* and *colleagues* motives for continuing to offer their services:

“I believe in the place and want to be part of it.” (Volunteer, Yorkshire Sculpture Park)

“I enjoy being here, it’s a chance to meet old friends.” (Volunteer, Yorkshire Sculpture Park)

The Cutty Sark had the highest number of work-experience seekers among the sample of volunteer respondents (see Table 7.6). Moreover, two additional respondents stated that they wished to be paid or receive a small wage. However, a comparison of work experience-seeking volunteers and their reasons for continuing to volunteer does not reveal a conclusive pattern. This is illustrated by the responses of two volunteers engaged in NVQ placements to the question of whether they receive any recompense:

“I enjoy it, it’s so different every hour. It fulfils the needs for my course” (Volunteer, Cutty Sark)

“Pretty limited, I’m hoping to get paid work. I’ve applied to the Globe, but the Cutty Sark is enjoyable.” (Volunteer, Cutty Sark)

While work experience is still a factor in their reasons for continuing to volunteer, it is not the only consideration.

This analysis has been based on too small a sample to provide any conclusive evidence. Moreover, while some of the short-serving respondents have given more pro-social motives, others have cited a wide range of different motives. It seems likely that there is a relationship between the initial prompt to volunteer, i.e. whether it was for work experience or for leisure reasons, and the continuing motive. However, this is not the case universally and the sample of work-experience seekers in this study is too small to be conclusive.

A pattern was sought across the ten case studies, according to how high their VMOS had been. Fountains Abbey, Knole, Brodsworth Hall, the National Railway Museum and the Severn Valley Railway had all achieved a high VMOS. Respondents at all of these cases, except for Brodsworth Hall, had frequently cited *help the organisation*. Does this mean there is a link between managing volunteers as though they are unpaid staff and developing a level of commitment towards the organisation? Table 7.10 shows that *commitment* does score highly among respondents at Fountains Abbey, Knole and the Severn Valley Railway, but then it also scores well at Kinver, Amberley and Avoncroft Museum of Buildings, which all had a lower VMOS.

Again a link between VMOS and levels of volunteer commitment can only be suggested by the data in this study and no conclusions can be drawn.

Thus, while across the ten case studies there is a change in motivation from more intrinsic subject interest to more extrinsic social motives, there does not appear to be any variation based on the length of service of the respondents.

## **7.6 Visitors sample profile**

The visitors' characteristics were different from the volunteers. Host-guest theory proposes that the most rewarding encounters occur between individuals from similar backgrounds (Smith, 1992). The gender differences at individual case studies were less

marked among the visitors than among the volunteers and these are presented in Table 7.11. Indeed only at the Severn Valley Railway were more male respondents interviewed than female. As only 6% of respondents were visiting on their own, this is likely to reflect the proportion of family groups (49%) and couples (31%) among the sample.

**Table 7.11 Visitors' gender by case study**

	Male (%)	Female (%)	<i>Number of respondents</i>
Fountains Abbey	48	52	94
Knole	38	62	111
Kinver	39	61	31
Brodsworth Hall	41	59	87
Amberley Museum	49	51	109
Avoncroft Museum of Buildings	39	61	83
Yorkshire Sculpture Park	30	70	56
Cutty Sark	43	57	112
National Railway Museum	44	56	82
Severn Valley Railway	65	35	37
<b>Total</b>	<b>44</b>	<b>56</b>	<b>802</b>

Overall, the visitors were experienced at visiting museums and heritage visitor attractions. 55% of respondents stated that they were making a repeat visit to that particular site, although they did not state how long ago their first visit had been. Only 8% of respondents stated that they had not visited another museum or heritage visitor attraction in the past 12 months, while 46% had visited more than 5. Since service encounters require that both participants are experienced in order for the encounter to be successful and the participants to *interlock* (Czepiel, Solomon & Surprenant, 1985), this is significant. In addition, visitors were asked if their visit had met their expectations (Question 11). The responses are reported in Table 7.12:



**Table 7.12 Visitors' expectations of their visit**

	Visit met or exceeded expectations	Visit was disappointing	Visitor did not know what to expect
Fountains Abbey	29	3	
Knole	30	11	
Kinver	2	1	2
Brodsworth Hall	24	1	
Amberley Museum	21	3	3
Avoncroft Museum of Buildings	22	2	
Yorkshire Sculpture Park	11	2	
Cutty Sark	18		2
National Railway Museum	15		1
Severn Valley Railway	9		
<i>Total</i>	<i>205</i>	<i>23</i>	<i>8</i>

In the majority of cases their expectations were either met or exceeded:

“The visit met all my expectations and was a very enjoyable day.” (Visitor, Fountains Abbey)

“We have been before and knew exactly what to expect” (Visitor, Brodsworth Hall)

“Great day, I have been 2-3 times previously. It’s nice to see additions.” (Visitor, Amberley Museum)

This is largely because visitors had either visited before or were experienced enough heritage consumers that they knew what the visit would entail and, indeed, that was why they had decided to visit that particular museum or heritage visitor attraction. The visitors that were disappointed with their visit were so because they had clear expectations, derived either from previous visits or from visiting similar organisations:

“I had hoped for a walk around the garden, rather than just parkland.” (Visitor, Knole)

“Having been to Singleton [a similar heritage visitor attraction] I was somewhat disappointed in the range of buildings on site.” (Visitor, Avoncroft Museum of Buildings)

“Sculpture not as good as previous visits.” (Visitor, Yorkshire Sculpture Park)

Indeed, only eight respondents stated that they had not known what to expect from their visit. The comments above and content analysis in Table 7.12, further demonstrate how the visitor sample consists of experienced heritage consumers.

The sample breakdown of visitors by age group is shown in Table 7.13. In comparison with the volunteers, the visitors are younger, with the majority aged 25-54 years old. In addition, Table 7.14 shows visitors' work status and *working full-time* is by far the most common response, with 47% of respondents across the ten case studies. Again these responses are likely to reflect the high proportion of family groups visiting the case studies. Moreover, the visitors are demographically more representative of the UK's population, where the largest age group currently is people aged 30-39 years, closely followed by those aged 40-49 years and 20-29 years (Matheson & Summerfield, 2001). Thus, while the visitors may be experienced consumers of museums and heritage visitor attractions, many of them are at a different life-stage from most of the volunteers.

**Table 7.13 Visitors' age group by case study**

	<b>18-24 years (%)</b>	<b>25-34 years (%)</b>	<b>35-44 years (%)</b>	<b>45-54 years (%)</b>	<b>55-59 years (%)</b>	<b>60-64 years (%)</b>	<b>65-74 years (%)</b>	<b>75 years and over (%)</b>	<b><i>Number of respondents</i></b>
Fountains Abbey	2	17	25	21	12	8	15	0	92
Knole	1	9	15	30	8	11	20	5	110
Kinver	6	19	29	23	3	3	16	0	31
Brodsworth Hall	4	9	12	29	12	6	21	19	85
Amberley Museum	1	13	30	28	5	7	14	4	111
Avoncroft Museum of Buildings	0	10	35	23	8	10	12	2	83
Yorkshire Sculpture Park	11	24	16	20	9	14	5	0	55
Cutty Sark	3	18	30	18	3	6	19	3	113
National Railway Museum	1	23	32	17	2	11	11	2	82
Severn Valley Railway	3	22	19	8	14	11	11	11	36
<i>Total</i>	<i>2</i>	<i>16</i>	<i>25</i>	<i>22</i>	<i>7</i>	<i>9</i>	<i>16</i>	<i>3</i>	<i>798</i>

**Table 7.14 Visitors' work status by case study**

	<b>Full-time education (%)</b>	<b>Looking after the house (%)</b>	<b>Working full-time (%)</b>	<b>Working part-time (%)</b>	<b>Unemployed (%)</b>	<b>Retired (%)</b>	<i>Number of respondents</i>
Fountains Abbey	0	9	58	13	0	21	92
Knole	2	2	47	11	0	38	107
Kinver	7	10	50	13	3	13	30
Brodsworth Hall	5	5	34	10	1	45	86
Amberley Museum	0	7	55	9	3	25	110
Avoncroft Museum of Buildings	1	6	45	24	0	24	83
Yorkshire Sculpture Park	16	5	39	20	3	16	56
Cutty Sark	5	12	44	11	1	28	112
National Railway Museum	4	10	54	11	1	20	83
Severn Valley Railway	0	8	44	10	0	38	36
<i>Total</i>	3	7	47	13	1	28	795

### 7.7 The role of interaction between volunteers and visitors

Volunteers' comments about the visitors (Questions 11-15) are summarised according to the content analysis in Table 7.15. Visitors' comments about the volunteers are summarised in Table 7.16. Immediately it is clear that the volunteers do enjoy their interaction with visitors. This is evident as much from the content analysis as individual comments:

"I like the interaction, unfortunately it's not always there." (Volunteer, Fountains Abbey)

"The more people who ask questions the more interesting. It's a bit dull otherwise." (Volunteer, Knole)

"Every activity at Avoncroft is designed for visitor interaction. It can get very boring without visitors." (Volunteer, Avoncroft Museum of Buildings)

*Sharing learning* and *answering questions* were also cited frequently by volunteers:

"I prefer talking to someone with some knowledge of the place." (Volunteer, Knole)

"You meet all sorts of people. There's always something they can tell you, or ask questions." (Volunteer, Brodsworth Hall)

**Table 7.15 Interaction with visitors**

	Share learning	Enjoy Meeting people	Welcoming	Answering questions	Provide service	Dull without visitors	Help visitors
<b>Fountains Abbey</b>	5	8	2	4		1	1
<b>Knole</b>	4	4	3	3		1	3
<b>Kinver</b>	1	2	1	3			
<b>Brodsworth Hall</b>	6	10	3	4		1	1
<b>Amberley Museum</b>	2	7	1	5			
<b>Avoncroft Museum</b>	6	2	1	5	1	2	1
<b>YSP</b>	1	2	1				1
<b>Cutty Sark</b>	2	6	1				
<b>NRM</b>	4	8		2			
<b>SVR</b>		7	2	2	2		
<b>Total</b>	31	56	15	28	3	5	7

YSP = Yorkshire Sculpture Park

NRM = National Railway Museum

SVR = Severn Valley Railway

**Table 7.16 Visitor's responses**

	<b>Added value</b>	<b>Friendly</b>	<b>Enjoyment</b>	<b>Helpful</b>	<b>Learning</b>	<b>Satisfaction</b>	<b>Social</b>	<b>Comfortable</b>	<b>Welcome</b>	<b>Negative</b>
<b>Fountains Abbey</b>	1	3		1	5		1			1
<b>Knole</b>	2	3		4	18	1			2	3
<b>Kinver</b>	2	2			5					1
<b>Brodsworth Hall</b>	1	6		5	18			2		4
<b>Amberley Museum</b>	1	3	2	3	13			5		
<b>Avoncroft Museum</b>	3	3	1		16			2	2	4
<b>YSP</b>										
<b>Cutty Sark</b>	3	1		1	9		1			
<b>NRM</b>	1				7					
<b>SVR</b>	2	2		1	2					1
<b>Total</b>	16	23	3	15	93	1	2	9	4	14

YSP = Yorkshire Sculpture Park  
 NRM = National Railway Museum  
 SVR = Severn Valley Railway

Notes: none of the visitor respondents at the Yorkshire Sculpture Park commented on the volunteers. This was most likely the case because volunteers are only in one gallery on a large site and there are only one or two volunteers on duty at a time, therefore the likelihood of meeting and interacting with a volunteer at the Yorkshire Sculpture Park is lower than at the other case studies.

However, *service* featured only a few times in volunteers' comments:

“People pay money to come in so [we're] supposed to be providing service.”  
(Volunteer, Avoncroft Museum of Buildings)

Overwhelmingly, visitors commented on the learning benefits of interacting with volunteers:

“Gained additional ‘quirky’ knowledge not to be found in guide books.”  
(Visitor, Knole)

“Frequently they have a more detailed knowledge than is contained in the guidebooks.” (Visitor, Amberley Museum)

Much less cited was the volunteers' friendliness and the impact volunteers had on the atmosphere of the site:

“It made Brodsworth a friendly place and sympathetic to small children.”  
(Visitor, Brodsworth Hall)

“A very friendly atmosphere.” (Visitor, Knole)

The ‘*added value*’ that volunteers can offer the visitor experience and their *helpfulness* were both also cited frequently. Added value typically took the form of additional learning:

“ Added interest. Made the visit more enjoyable and memorable.” (Visitor, Amberley Museum)

“The ‘added value’ of the information from the stewards” (Visitor, Brodsworth Hall)

*Helpfulness* is the closest service concept that visitors regularly cited:

“They were very helpful and quite knowledgeable about the house and family.”  
(Visitor, Brodsworth Hall)

“She was very helpful, lifting my son over the large step and taking him into the cabin area.” (Visitor, Cutty Sark)

Few volunteers cited *service* directly, though this was implied through welcoming visitors and answering their questions. Indeed, volunteers showed an awareness of their role in promoting the museum to the visitors:

“We’re trying to sell it, visitors feel it when you enjoy it yourself, you transmit enthusiasm.” (Volunteer, Fountains Abbey)

“They [the visitors] thank you profusely for ‘making their day’. If you’ve enjoyed it then you’ll tell you’re friends, you get more advertising that way.” (Volunteer, Amberley Museum)

“If we don’t make a fuss of them they won’t come back.” (Volunteer, Severn Valley Railway)

Overall, service motives were not often cited by volunteers, nor were service benefits frequently stated by visitors. However, the service encounter is primarily a social encounter (McCallum & Harrison, 1985). Indeed since the visitors are experienced heritage consumers they will have the templates necessary to enable them to engage in social interaction with the volunteers.

The host-guest encounter is less about serving the customer, than making the guest feel welcome and at home (Pearce, 1982; Smith, 1992). Both volunteers and visitors talked about enjoying the encounters between them. For the volunteers, enjoyment was the most cited motive for interacting with visitors:

“We pride ourselves on welcoming visitors and informing them and developing a rapport with them.” (Volunteer, Brodsworth Hall)

“I like seeing people’s reactions, seeing smiles and laughs, surprise, to share something and enjoyment with them. I haven’t had a dud one yet.” (Volunteer, Cutty Sark)

“Seeing the bairns happy gives you more satisfaction than money.” (Volunteer, National Railway Museum)

Visitors too had commented on how friendly volunteers were and how this enhanced their visit:

“The human touch makes the place seem more friendly” (Visitor, Fountains Abbey)

“Their friendliness and knowledge makes the place seem more interesting and I have wanted to take visitors there.” (Visitor, Kinver)



“The steward was very friendly, had detailed knowledge which he presented in an interesting way.” (Visitor, Cutty Sark)

Encounters between visitors and volunteers are clearly enjoyable for both parties. The volunteers make the visitors feel welcome and comfortable in their surroundings, which is important since feeling comfortable in one’s surroundings is one of Hood’s characteristics of an enjoyable leisure experience (Hood, 1983). However, Pearce states that within a host-guest encounter the situation is novel for the visitor (Pearce, 1982). Since this is not the case with the majority of visitor respondents in the sample, does the concept of hosts and guests need to be rethought or is this another form of encounter?

Moreover, Smith stated that a rewarding host-guest encounter was likely to occur between individuals with similar backgrounds (Smith, 1978). An individual’s background includes their level of educational attainment. It has been noted above that both the volunteers and the visitors display an above average level of educational attainment. However, does the visitors’ level of educational attainment have any impact on whether they enjoyed their interaction with the volunteers? Visitors’ level of educational attainment was cross-tabulated with whether they made no comment, a negative comment or a positive comment about the volunteers they met. The education categories were aggregated in order for a chi-square significance test to be calculated (Bryman & Cramer, 1997). As there were only a small number of negative comments, these were collated with the no comment respondents in order that no cells would have an expected count of less than five, as this would invalidate the test. The results are presented in Table 7.17:

**Table 7.17 The relationship between visitors’ educational attainment and number of positive comments made about volunteers**

Level of educational attainment	Negative or no comment	Positive comment	Total comments
School level	9 53%	8 47%	17 100%
Post-school	22 27%	58 73%	80 100%
<i>Total</i>	<i>31</i> <i>32%</i>	<i>66</i> <i>68%</i>	<i>97</i> <i>100%</i>

The chi-square test with continuity correction provides some evidence that there is a significant relationship between educational attainment and likelihood of making a positive comment about the volunteers, giving a p value of 0.08 (Bryman & Cramer, 1997). This suggests that visitors with a higher level of educational attainment may value the interaction they have with the volunteers more highly.

Peer tutoring seems a likely contender for visitors' view of volunteers, since learning as a benefit from interacting with volunteers was cited 93 times and was by far the most stated benefit:

“Without the explanations of the windmill steward, the workings of the internal machinery would not have been understood.” (Visitor, Avoncroft Museum of Buildings)

Volunteers too commented on not only enjoying sharing information with visitors, but that they preferred it when they spoke to visitors with some knowledge of the subject:

“The interchange of ideas...Quite often you get back more than you give out.” (Volunteer, Avoncroft Museum of Buildings)

The volunteers and visitors within the sample are typically at different life-stages, but peer tutoring can be between different age groups. The tutors may be older than the tutees (Topping, 1996) but they are still amateurs, i.e. not trained teachers. This is certainly the case with the volunteers at the ten case studies, although those seeking work experience in guiding and interpretation at the Cutty Sark are training to become professionals. The concept of peer tutoring raises the issue of whether older visitors were more able to interact with the volunteers, who were a similar age group. Table 7.18 presents the cross tabulation of visitors' age group and whether they made a positive, negative or no comment about the volunteers they met. The age groups were aggregated to enable a chi-square test to be calculated.

**Table 7.18 The relationship between visitors' age group and likelihood of making a positive comment about the volunteers**

Age Group	Negative or no comments	Positive comments	Total comments
18-34 years	20 45%	24 55%	44 100%
35-59 years	44 34%	87 66%	131 100%
60 years and above	21 30%	50 70%	71 100%
<i>Total</i>	85 35%	161 65%	246 100%

Although the chi-squared test did not reveal a significant relationship between visitors' age and whether they made a positive comment about the volunteers they met (p value = 0.2), there is visually a pattern, with the likelihood of making a positive comment about the volunteers increasing with age.

As noted in Tables 7.17 and 7.18, visitors also made a number of negative comments about volunteers, based on past experiences:

“Their aloofness and rudeness has stopped us going to some places.” (Visitor, Knole)

“They interfere with the ambience.” (Visitor, Avoncroft Museum of Buildings)

These comments only constitute 8% of the content analysis, but they do illustrate that not all visitors enjoy their encounters with volunteers. The volunteers' comments showed that they were aware of visitors' wants and the need to be sensitive in not interfering with their visit:

“You know immediately if they want to know or if they've been dragged here by friends.” (Volunteer, Fountains Abbey).

“We exercise discretion as to whether our approach will be welcomed.”  
(Volunteer, Brodsworth Hall)

“Not everyone does [enjoy the interaction], some are very interested, some not interested at all.” (Volunteer, Amberley Museum)

### 7.8 Volunteering: work or leisure?

Chapter Three documented two models of viewing volunteering: the economic model and the leisure model. Chapter Six demonstrated that the management at the ten case studies had either already adopted the economic model or was moving in that direction. While the analysis reported in 7.5 showed there was no consistent pattern between volunteers' motives at case studies with a high VMOS, the analysis has not examined whether volunteering appears to be either a leisure activity or a form of unpaid work. The sample included a small number of volunteers involved in work experience. While this is not statistically significant, this suggests that a large proportion of the volunteers in this study are not seeking work experience. This is supported by the high number of retired respondents in the sample, which reflects other studies of volunteers in the heritage sector, as reported in Chapter Two (Davis Smith & Chambers, 1997; BAFM, 1998). Having said this, work-related terms were used by volunteers to describe their activities, for example:

“The work is completely voluntary.” (Volunteer, Brodsworth Hall)

This comment shows how the vocabulary for discussing volunteering is limited, thus the term *work* is often used, when unpaid work may not be what the speaker wishes to imply, as may be the case with this respondent:

“I like the job – you never know what’s going to happen.” (Volunteer, National Railway Museum)

The content analysis in Tables 7.7-7.11 is designed to note motives that are indicative of an enjoyable leisure experience as set out in Box 3.2 (Hood, 1983) and those that suggest volunteering is a serious leisure activity, as set out in Box 3.4 (Stebbins, 1992). As stated in Chapter Three, serious leisure has some different characteristics from enjoyable leisure, thus the number of citations for each will vary. Table 7.19 compares the number of work-related citations with the number of enjoyable leisure-related citations. In Table 7.7 eight respondents cited *work experience*, while six others cited work-related motives. In contrast, two volunteers cited *challenge*, two noted *comfortable in surroundings*, seven cited *enjoyment*, one respondent cited *learning* and 17 noted *social opportunities*. So added together, there were 14 work-related citations and 29 leisure-related citations. *Doing something worthwhile* was excluded from Table 7.19 as it was classed as both a characteristic of enjoyable leisure and a work-related motive. This exercise is carried out for all four tables and the results are:

**Table 7.19 Number of work citations compared to leisure citations**

	Work-related citations	Enjoyable leisure-related citations
Initial motivation (Table 7.7)	14	29
Expectations (Table 7.8)	9	103
Continuing to (Table 7.9)	15	154
Final motivation (Table 7.10)	8	94
Total	46	380

Leisure-related comments clearly outweigh the number of work-related citations and this is illustrated by volunteers' comments:

“As a volunteer you can't expect benefits. If you want benefits you get a job. You do what you want to do and try not to let people down.” (Volunteer, Fountains Abbey)

“It's nice to come back here as the duties are infrequent...to do something totally different from work.” (Volunteer, National Railway Museum)

“The beauty of being a volunteer is that you carry on until you don't enjoy it.” (Volunteer, Severn Valley Railway)

The comments of those younger volunteers, who are still working full-time, provide additional support for this premise:

“It provides me with an opportunity to follow an interest. Also it is a major factor in 'relaxing' me from my full-time work.” (Volunteer, National Railway Museum)

“...it's different from [meeting] the public where I work at the Abbey National, you just get them arguing, but here people take an interest, that's why they come.” (Volunteer, Knole)

Thus, it appears that the majority of volunteers in this sample are leisure-seeking. However, are they seeking serious leisure? Serious leisure, as defined by Stebbins in Box 3.4 (Stebbins, 1992), differs from enjoyable leisure, as defined by Hood in Box 3.2 (Hood, 1983), in that serious leisure requires additional commitment, a feeling of belonging to a group or identifying with an activity. Learning knowledge and skills and pursuing an interest are also characteristic of serious leisure. Finally, serious leisure participants develop a career in their chosen pursuit.

The proportion of enjoyable leisure citations given by respondents were further compared to the number of serious leisure citations. Within the content analysis in Tables 7.7-7.10, serious leisure included the key words *belonging, challenge, colleagues, enjoyment, identify, learning/new skills* and *personal effort* so that serious leisure could be compared with enjoyable leisure, as represented by the key words *challenge, comfortable in surroundings, enjoyment, learning, social opportunities* and *doing something worthwhile*. Note that *doing something worthwhile* was excluded from Table 7.19, thus the number of enjoyable leisure citations is higher in Table 7.20.

**Table 7.20 Number of enjoyable leisure citations compared to serious leisure citations**

	Enjoyable Leisure	Serious Leisure
Initial motivation (Table 7.7)	46	10
Expectations (Table 7.8)	143	131
Continuing to (Table 7.9)	177	133
Final motivation (Table 7.10)	112	100
Total	478	374

While there are 20% more citations related to enjoyable leisure, rather than serious leisure, there are a high number of comments denoting serious leisure characteristics. In addition, the number of volunteers citing their commitment was noted in Table 7.10, which was the most commonly stated reason for continuing to volunteer. Moreover, the level of commitment volunteers' show towards their organisation is illustrated by the length of service given, shown in Table 7.5, where nearly one-fifth of respondents have been volunteering for more than ten years. Commitment is a characteristic of serious leisure, encapsulated in the first three qualities of serious leisure (Box 3.4): the occasional need to persevere; participants find a career in the endeavour; and the pursuit demands significant personal effort.

In particular, there is often a focus on the career aspects of serious leisure (Cuskelly, Harrington & Stebbins, forthcoming). Volunteer respondents were asked if they had previously volunteered. Across the ten case studies, 59% of volunteers had offered their services elsewhere. However, this did vary considerably across the cases, with 67% having volunteered before at Amberley Museum, but only 6% at Avoncroft Museum of Buildings. This does not appear to have any impact on the number of citations of commitment at each case study. Moreover, the organisations listed by volunteers, where

they had previously volunteered, varied considerably from other heritage visitor attractions:

“I was living in Devonshire and [volunteering] at a house called Saltram. When I moved I notified the local [National Trust] office.” (Volunteer, Knole)

“I had been stewarding at Skipton Parish Church and had also rewritten the guidebook so I had some experience.” (Volunteer, Fountains Abbey)

“I was already a tourist guide for the village of Kinver and the volunteer work developed further.” (Volunteer, Kinver)

There were also several volunteers who had volunteered for welfare and educational activities, for example:

“At university I tutored in schools.” (Volunteer, Knole)

“Specials with the police – I’m a great believer in helping out.” (Volunteer, Amberley Museum)

“Drive an ambulance for Age Concern.” (Volunteer, Cutty Sark)

While volunteers’ initial reasons for offering their services were closely related to the subject matter of that particular organisation (Table 7.7), their reasons for continuing to volunteer were more generic (Table 7.10) and may well be met by many forms of volunteering. In addition, there was sufficient evidence of former paid employees now volunteering at the case studies. This was found at Fountains Abbey, Amberley Museum and the Yorkshire Sculpture Park:

“I worked at Fountains Abbey for eight years before retiring.” (Volunteer, Fountains Abbey)

“I came first as a volunteer, then I was staff for six years and then back to being a volunteer.” (Volunteer, Amberley Museum)

### **7.9 Retirement as prompt for volunteering**

In Chapter Three it was noted that the high proportion of older, retired volunteers within the heritage sector must be considered as part of the interaction. Since the sample generated a high number of retired respondents and retirement was frequently cited as a reason for initially volunteering in Table 7.7 this makes this analysis even more pertinent to the research questions. In particular two theories were proposed, which were that volunteering was a means of reengaging in society after retirement

(Reengagement theory) or that volunteering was a means of continuing an activity or interest (Activity theory). Although there were a similar number of statements supporting retirement as a prompt for pursuing volunteering as a means to reengage (11 statements) and an opportunity to pursue an existing interest (12 statements), the latter would seem more consistent with subject interest cited as the main prompt overall for initially volunteering.

Reengagement theory, is supported by statements such as:

“I wanted something to do in retirement.” (Volunteer, Avoncroft Museum of Buildings)

“I needed to find something to do when retired.” (Volunteer, Brodsworth Hall)

“I’m retired so it’s a place to meet people and be part of the world.” (Volunteer, Fountains Abbey)

“I had worked for 40 years and wanted to do something completely different.” (Volunteer, Knole)

Whereas activity theory is supported by statements such as:

“I’m retired and I had always wanted to do this, so I wrote as soon as I could.” (Volunteer, Knole)

“As a lifelong railway enthusiast and recently retired it is an interesting way to [spend time].” (Volunteer, National Railway Museum)

“I’d always had a love of history and the year before I retired they were advertising for volunteers.” (Volunteer, Brodsworth Hall)

Thus, both reengagement theory and activity theory are relevant when examining the volunteers within this sample. In some cases retirement offers the volunteers the first opportunity to pursue their interests, while in other cases volunteering is a means of keeping active or developing a new interest. While volunteer managers may wish to target people who have already shown an interest, for example Knole targeting National Trust members, this should not be the limit of their recruitment.

This analysis suggests that Smith’s assertion that volunteers may be visitors at a different stage of their life-cycle (Smith, 1999), while a compelling theory, is only partly the case and that McIvor’s theory, that volunteers are active visitors (McIvor,



1996), should again be viewed with some caution. Having said this, as noted above, subject interest was the most cited reason by volunteers for initially offering their services, this implies that there was more empirical evidence to support activity theory, than reengagement theory.

### **7.9 Chapter summary**

This chapter presented the data analysis of the volunteer and visitor interviews. The characteristics of the volunteers in the sample were discussed and found to be comparable with the volunteer respondents to the surveys in Chapter Two. Volunteers' responses were content analysed and compared across the ten case studies. Overall it was found that intrinsic, personal interest reasons were most important in prompting volunteers to offer their services, but that extrinsic, social motives were more significant in persuading respondents to continue to volunteer.

Interaction with visitors was found to be a major benefit of front-of-house volunteering. While some respondents were concerned with serving visitors well, most were more interested in enjoying their encounters with visitors. In contrast, visitors cited learning as the greatest benefit from interacting with volunteers. This suggests that visitors view their encounters with volunteers as peer tutoring.

Volunteers' comments were further analysed to see if volunteering might be classed more as unpaid work or as a leisure activity. The evidence suggested that volunteering was indeed leisure and, in addition, was a form of serious leisure due to the levels of commitment that the respondents demonstrated. Finally, the role of retirement, frequently cited as a reason for volunteering in Table 7.7, was reviewed. However, volunteers' responses pointed to both reengagement and activity theory as explanations of why they decided to volunteer in retirement.

## **Chapter 8: Discussion**

### **8.1 Introduction**

In this chapter the conceptual framework developed in Chapters Two and Three, on whether volunteering is a leisure activity or unpaid work, is reconsidered. The two research propositions are compared with the data analysis presented in Chapter Seven. In addition, the research hypotheses, models of volunteer-visitor interaction and the relationship between volunteering and retirement are discussed.

### **8.2 Volunteering: a professionally managed leisure activity**

Chapter Three considered the development of two paradigms for examining volunteering: the economic model and the leisure model. The economic model considered volunteers akin to unpaid employees and had devised a blueprint for managing them according to the needs of the managers. This is termed professional volunteer management, which has become accepted best practice for managing volunteers largely due to a series of external and internal pressures, documented in Chapter Three. The leisure model is derived from researchers' examinations of volunteering in itself, not how it can benefit the organisation. Chapter Three concluded by suggesting that there was an inconsistency between professional volunteer management and leisure-seeking volunteers.

Chapter Six, in establishing the context for the ten case studies, compared their management procedures against McCurley and Lynch's model for professional volunteer management (McCurley & Lynch, 1998) and devised a means of measuring the adoption of professional management procedures using a Volunteer Management Orientation Score or VMOS. A VMOS score of around 18 was considered high. Four of the case studies achieved a high VMOS, while all the others gained a score of between 9 and 13, which was considered average. None of the case studies gained a low VMOS. Moreover, all the case studies, which did not already have a high VMOS stated their intention to introduce further professional management procedures.

There were two significant reasons for introducing professional volunteer management. These were health and safety requirements and the involvement of trade unions. The

two public sector case studies, Brodsworth Hall and the National Railway Museum, were both required to negotiate the role of volunteers with trade union representatives. This led to the adoption of certain professional procedures, for example, clear job descriptions for all the volunteers. Secondly, the requirements of health and safety legislation meant that at other case studies, in particular volunteers operating the miniature train at the National Railway Museum and volunteers involved in operating the trains at the Severn Valley Railway, professional procedures such as training programmes with exams and volunteer handbooks had been introduced. Thus, as noted in Chapter Three, the adoption of professional volunteer management is largely due to external and internal pressures. On the other hand, there are certain barriers preventing organisations from adopting professional volunteer management. At Amberley, even though the training and development plan recommended employing a paid volunteer coordinator, the resources were not available.

The comparison of work-related motive citations and leisure-related motive citations in section 7.17 suggests that volunteering is a leisure activity. Given the high proportion of retired volunteers, both within the sample and across the heritage sector (Mattingly, 1984; Davis Smith & Chambers, 1997; BAFM, 1998; Holmes, 2001), there is a logic to this. Retired individuals seem unlikely to be pursuing work experience activities, although some researchers have suggested that retired volunteers are seeking to replace elements of the working life they have left behind (Tinsley et al, 1987). The relationship between retirement and older volunteers is discussed further in section 8.9.

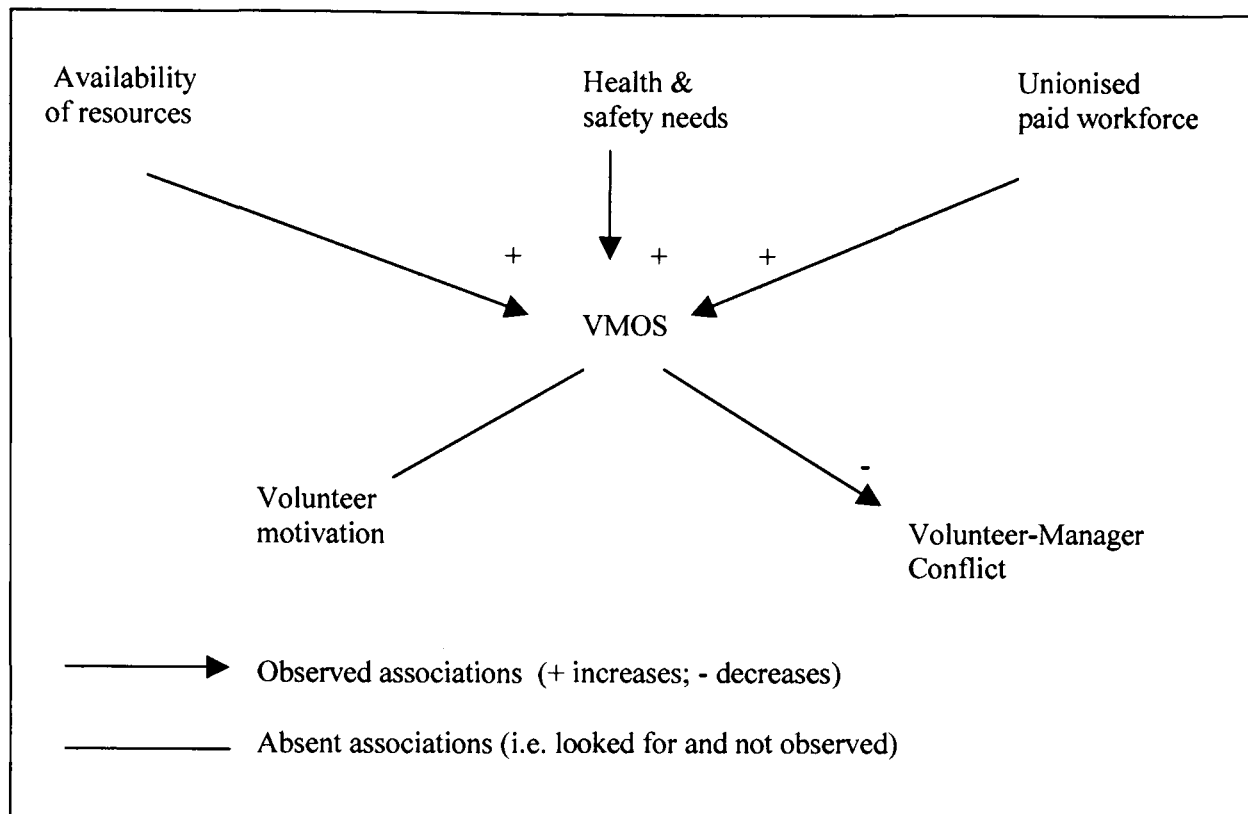
Thus, volunteering for front-of-house volunteers within the heritage sector appears to be a leisure activity. Can this be reconciled with the adoption of professional management techniques? It appears so. An examination of Tables 7.7-10 reveals no particular pattern among the number of work-related citations by volunteers and the VMOS of the individual case studies. For example, the Cutty Sark gained a VMOS of 10, an average score, but has the highest number of work experience-seekers in Table 7.7. In Table 7.9 there is a hint that there may be relationship between a high VMOS and the number of work-related motive citations. Four respondents at the National Railway Museum cited work-related motives, with a VMOS of 18, but this is countered by three respondents at Brodsworth Hall, who cited work-related motives. Brodsworth Hall only gained a VMOS of 13, an average score. Thus, it seems that there is no relationship between a

high VMOS and the volunteers' motivation. This suggests that the polarisation between the economic and leisure paradigms revealed in the literature review is not so significant as was considered.

The next question is: does it matter if the managers treat volunteers as unpaid workers if this has no impact on their motivation? Could this be the result of the characteristics of the individuals who volunteer? For example, the volunteers within the sample have typically been well-educated people who have worked all their lives and may therefore appreciate the organisation's need to manage itself effectively, including the volunteers, regardless of the individuals' motives. The answers to these questions lie outside the focus of this thesis. What is clear is that volunteers, both within heritage organisations and across the wider voluntary sector, are increasingly managed according to professional volunteer management and this has no significant impact on the motivation of front-of-house volunteers. Their managers may consider the volunteers to be fulfilling an economic function and the volunteers may consider themselves to be engaged in a leisure activity, but these are not irreconcilable viewpoints.

In one case study there was evidence of conflict between the managers and the volunteers. This was at Kinver, which had a VMOS of 9. There was one occasion where the volunteer group had entered the rock houses for a local award, but no one from the group had arrived to show the assessors around and the custodian took on this role. The custodian, however, was not happy about this imposition. This clearly demonstrates a lack of communication between the entirely voluntary volunteer group and the managers at Kinver. Could this also be a sign that a low VMOS is detrimental to the smooth workings of the organisation? Since the other cases scored higher VMOS it is difficult to explore this question further, but this suggests that a low VMOS may be more a potential source of conflict than a high VMOS. The different influences contributing to, and outcomes generated by, the VMOS of an organisation are mapped in Figure 8.1.

Figure 8.1 Influence diagram for the influences and outcomes of VMOS



### 8.3 Enjoyable leisure, serious leisure and work

If volunteering is leisure, then what form of leisure is it? Chapter Three presented two overlapping models: Hood's enjoyable leisure, Stebbins' serious and casual leisure and work, which are illustrated in Figure 3.2, reproduced below:

Figure 3.2 Enjoyable, serious and casual leisure and work

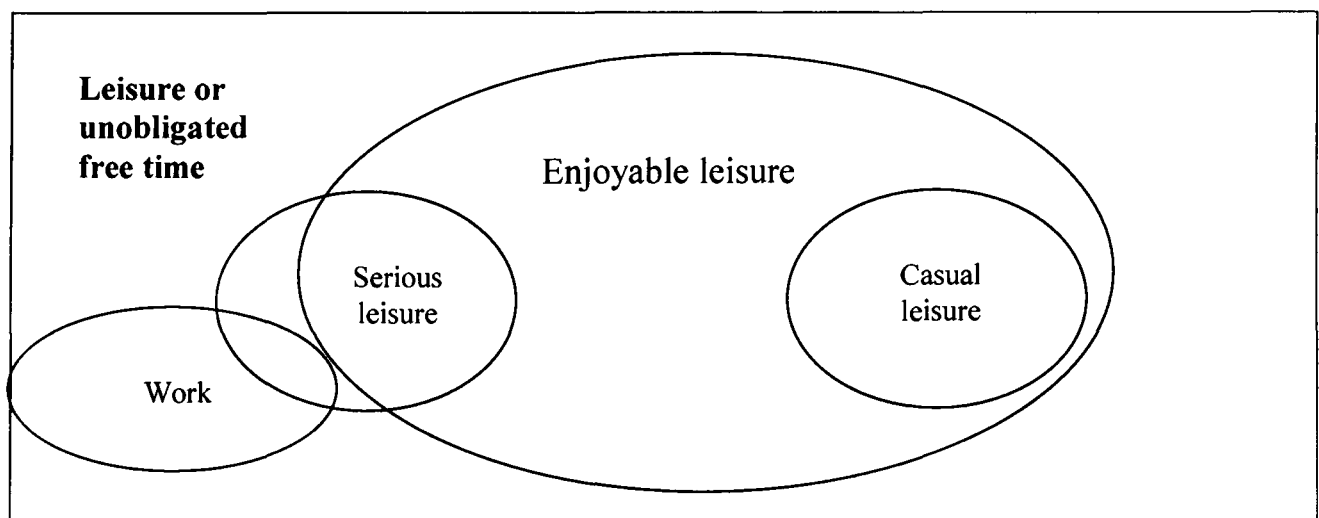


Table 7.19 showed that volunteers were motivated by the characteristics of enjoyable leisure, rather than work. Moreover, Table 7.20 showed that both enjoyable leisure and serious leisure were significant motivators, as a result of the number of citations by volunteers. Serious leisure and enjoyable leisure overlap with some of their characteristics, for example, with opportunities for social interaction and learning. However, there are some characteristics of serious leisure, which fall outside the parameters of enjoyable leisure, as illustrated in Figure 3.2. These include the occasional need to persevere and the pursuit of a career. These elements were evident among the volunteers, particularly by noting difficult aspects of their activities:

“When the weather’s bad it’s very cold in the church.” (Volunteer, Fountains Abbey)

“It takes a while to learn, but I’m learning every time.” (Volunteer, Knole)

“[I would like] assurance that I get a lunch break on each duty day. It’s very haphazard at the moment.” (Volunteer, Avoncroft Museum of Buildings)

This is further supported by the pursuit of a career, as noted in 7.8 and by the high level of commitment motives cited by volunteers in Tables 7.9 and 7.10 and the length of service presented in Table 7.5. Therefore, some volunteers are pursuing volunteering as a serious leisure activity. Since a higher proportion of enjoyable leisure motive citations were noted in Table 7.18, this study suggests that for the majority of respondents, volunteering is an enjoyable leisure activity. Yet, the significance of serious leisure must be taken into account when considering the level of commitment and length of service given by volunteers and in considering their motivation.

#### **8.4 Social or pro-social motivation?**

The research propositions for this study were:

I Volunteers are motivated by social interaction and

II Volunteers are pro-socially motivated

These propositions generated seven hypotheses:

H1 Volunteers are motivated by social opportunities

H2 Volunteer and visitor interaction is a service encounter

H3 Volunteer and visitor interaction is a host-guest encounter

H4 Volunteer and visitor interaction is peer tutoring

H5 Volunteers are extrinsically motivated

H6 Volunteering is something worthwhile

H7 Volunteers are intrinsically motivated

Hypotheses 1-5 relate directly to research proposition I and hypotheses 6 and 7 relate directly to research proposition II.

The content analysis presented in Chapter Seven revealed a much higher proportion of social motive citations than pro-social citations. This is not to say that pro-social motives were not cited by the volunteer respondents, but that they were outnumbered by the proportion of social motives. Table 7.9 notes that social opportunities were cited by volunteers 59 times, with an additional 35 comments about colleagues, whereas doing something worthwhile or helping the organisation were cited only 23 times. Table 7.10 shows 26 citations of social opportunities and 16 of colleagues, compared to 18 citations of doing something worthwhile. Therefore, this study has generated considerable evidence to support H1, but only a smaller amount of evidence to support H6. Thus, research proposition I is the most convincing of the two research propositions. This supports Osborne's study of retired volunteers in south-west England's museums, which suggested that affiliative motives were the most important (Osborne, 1999).

### **8.5 Extrinsic versus intrinsic motivation**

The above discussion, however, only examines two of the hypotheses. Research proposition I proposes that volunteers' motivation is extrinsic (H5), while research proposition II proposes that volunteers are intrinsically motivated (H7). Intrinsic and extrinsic motives were considered by Herzberg (1966) in his Hygiene Factors and Motivators theory of motivation to work, reported in Chapter Three. Hygiene Factors were largely extrinsic motivators and could be influenced by the organisation. Motivators were largely intrinsic motivators and originated from within the individual and therefore are difficult for the organisation to influence. Thus, intrinsic motivators include: an individual's interests, keeping the mind active and feeling useful. Extrinsic motivators include: meeting people, being part of a team, rewards in kind, the working environment and learning new skills.

An examination of Tables 7.7-7.10 shows that neither hypothesis is entirely the case. In Table 7.7, the most cited reason for initially volunteering, with 89 citations, is subject interest. This is an intrinsic motivation. The second most cited motive is *keeping active in retirement*, also an intrinsic motive, and *social opportunities* along with *local, while doing something worthwhile* was fourth. Thus, intrinsic motivation is clearly the most important motivator for volunteers initially offering their services.

“Recently retired and interested in local history.” (Volunteer, Fountains Abbey)

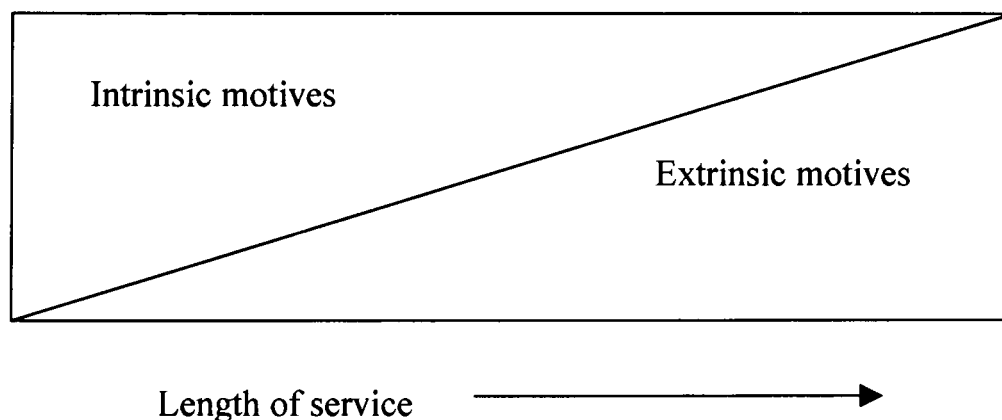
“I thought it would be interesting as I like old houses and the countryside.”

(Volunteer, Brodsworth Hall)

“Railway have been a lifelong interest.” (Volunteer, National Railway Museum)

In Table 7.8, however, *social opportunities* is the most cited motive among volunteers’ expectations, with 47 citations, although *doing something worthwhile* had forty citations. The difference is more clearly marked in Table 7.9, which reports on volunteers’ reasons for continuing to volunteer. Here, *social opportunities* has 59 citations and *colleagues* has 30, while *doing something worthwhile* has only 23. Therefore, extrinsic motives appear more important in retaining volunteers. In fact, there appears to be a sliding scale with extrinsic motives, in particular social networks, gradually gaining in importance, while intrinsic factors which are more likely to have prompted volunteers’ initial decision to offer their services, declining in importance. This is illustrated in Figure 8.2:

*Figure 8.2* Volunteers’ changing motivation over time



This model correlates to an extent with the three groups of volunteers’ motives proposed in Chapter Three by Morrow-Howell and Mui (1989), Puffer and Meindl (1992) and Caldwell and Andereck (1994). The three groups of motives were detailed in



Box 3.1 and include altruistic motives, self-interest motives and social motives. Self-interest was suggested as a means for describing work experience, which featured only as a minor element among the volunteers' motives in this study. However, the researchers suggested that volunteers' motivation at all times was a combination of these three. Unless focusing entirely on work experience-seekers, self-interest motives, do not seem to justify a separate classification. For example, seeking social opportunities has elements of self-interest as it gives some benefit to the volunteer. This leaves altruistic and social motives. This research shows that firstly, social motives are more important than altruistic motives and secondly, that the importance of social motives grows over time.

Studies reported in Chapter Three, show that researchers have considered intrinsic motivation to be more important for volunteers because they are perceived to be altruistic, or pro-social. Frey (1997) argued that since volunteers are unpaid they must be intrinsically motivated, while Lapham (1988; 1990) warned about relying too heavily on intrinsic motivation as a reward for volunteering. This thesis supports Lapham's research and it seems that researchers of volunteer motivation have approached the topic from the economic paradigm, with little consideration to the leisure benefits volunteers may gain from their activities. Indeed, this is little surprise in Frey's case, as he is an economist.

The surveys presented in Chapter Two also suggested that intrinsic motives were more important in attracting volunteers, while a combination of intrinsic and extrinsic factors retained volunteers. Respondents to both the BAFM and National Trust surveys stated that they knew of the organisation's work and specifically wanted to work with them, implying that they wanted to help it, as the main reason why they have volunteered. However, when asked what benefits they gained from their activities, respondents to the National Trust survey stated that they enjoyed it (98%) and made friends through their volunteering (85%). Manager respondents to both the Mattingly survey and the repeated Mattingly study stated that *subject interest* was the most important reason for volunteers offering their services. This research supports them in this, however, their low rating of social opportunities, ranked sixth in the 1984 study and fifth in the 1998 study, shows that they too may be relying too heavily on the economic view of the role of volunteers

within their organisation and perhaps not giving sufficient consideration to the benefits volunteers are seeking.

Moreover, research conducted by Ilsley (1990) and Pearce (1993), reported in Chapter Three found that volunteers' motivation changed over the course of their volunteering career. The changing nature of volunteers' motivation, noted above, supports Pearce's suggestion that managers should stop worrying about why volunteers come, but focus on keeping them there (Pearce, 1993). These results are encouraging news for managers as it is easier for them to influence extrinsic factors. However, some caution must be exercised in considering the context of this studies findings. Deci (1975) and Pearce (1987) have already warned in Chapter Three of managers' relying too heavily on extrinsic rewards for their volunteers, where these rewards take the form of financial recompense or other tangible benefits. While there is no doubt that it is only fair to recompense volunteers where possible, so that their activities do not leave them out of pocket and the volunteers' responses show that they do appreciate these benefits, extrinsic motivators are closely linked to the research proposition that volunteers are socially motivated.

This discussion of volunteer motivation is relevant to the wider voluntary sector, since heritage volunteers have similar characteristics to volunteers more generally (see Chapters One and Two). Across the voluntary sector, managers should note that the motivation of their volunteers is likely to change. It seems likely the volunteers are attracted to work in a specific organisation, or undertake a specific type of activity, because they are interested in the organisation, its work and values. However, while this may spur the initial decision to volunteer, over time volunteers' motives are likely to converge, regardless of the organisation or activity they are engaged in. Social opportunities, commitment to colleagues and personal development are likely to motivate volunteers at any organisation in the long-term.

### **8.6 An interaction theory of volunteer motivation**

As stated above, research proposition I was found to be the most convincing explanation of volunteers' motivation. Moreover, interaction between colleagues, museum staff and visitors contributed to creating enjoyable social interaction for the volunteers.

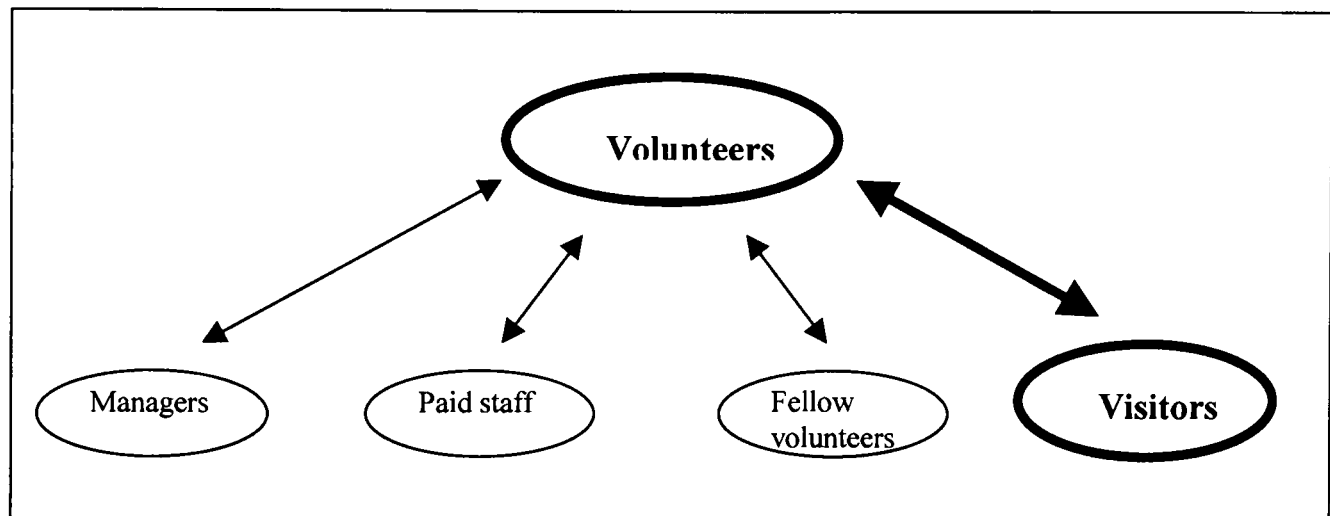
“The good camaraderie, the people you work with, the people you meet doing the job...” (Volunteer, Brodsworth Hall)

“[I] meet nice people and make nice friends with the other wardens.” (Volunteer, Avoncroft Museum of Buildings)

“I’m getting to know the permanent staff, we’re one big happy family.” (Volunteer, National Railway Museum)

Figure 3.3. shows how these difference interactions impact on the volunteer and, thus, their motivation. For volunteers in front-of-house roles, the key interaction is with visitors, as highlighted in the Figure 3.3 below:

*Figure 3.3 An Interaction Model of Volunteer Motivation*



Tables 7.8-7.10 show that while social interaction with fellow volunteers, *colleagues*, is important, more general social interaction, *social opportunities*, was more frequently cited (the total number of *colleagues* citations was 61, while the total number of *social opportunities* citations was 132). *Social opportunities* typically referred to ‘meeting people’:

“Meeting a variety of people and helping them to learn about the site.” (Volunteer, Fountains Abbey)

“Meeting people who are interested in the buildings.” (Volunteer, Avoncroft Museum of Buildings)

“Meeting people from all walks of life.” (Volunteer, Cutty Sark)

Clearly, meeting visitors is an important motivator for the volunteers. This is supported by the volunteers' comments referring to either the absence of interaction with visitors or indeed the absence of visitors entirely, for example on a slow day, as discussed in section 7.7 and shown in Table 7.15. For a front-of-house volunteer, visitor interaction is the purpose of their role, thus it is perhaps not surprising that this is also the source of their motivation:

“This is our sole purpose: to answer as many questions as we can and be helpful.” (Volunteer, Brodsworth Hall)

### **8.7 Modelling the volunteer and visitor encounter**

Hypotheses H2-H4 proposed three different models for considering the volunteer-visitor encounter: the service encounter, the host-guest encounter and peer tutoring. The three models of encounter were conceptualised in Chapter Three.

#### **The service encounter**

The service encounter takes place between a customer and an employee. However, since many volunteer managers view volunteers as unpaid employees, this is not an obstacle in considering this model. As noted by Swarbrooke (1995) in Box 3.5, museums and heritage visitor attractions are service delivery organisations, where the service is the intangible visitor experience. The volunteers (and other front-of-house staff) form part of both the service delivery process and the service product. Thus, their role is crucial in creating customer satisfaction. The service encounter is a social situation, whereby it is socially acceptable for strangers to interact with each other towards a shared purpose, although this purpose is limited in scope. Individuals use similar past encounters (templates) both to guide and evaluate new encounters. Thus, some degree of familiarity with the situation helps to lead to a satisfying conclusion for both parties. Indeed, the most satisfying encounters occur between individuals who want similar outcomes and are said to *interlock*.

The visitor sample, reported in Chapter Seven, shows that majority of the visitors had previous experience of visiting and only 8% had not visited another museum or heritage visitor attraction in the past 12 months, while 46% had visited more than five. Therefore, the visitors were used to visiting museums and heritage visitor attractions and, given the proportion of organisations across the heritage sector which involve

volunteers in front-of-house activities (see Chapter Two), they were likely to have met similar volunteers before and have developed a template by which to interact with them. This would be equally the case for visitors who did not enjoy interacting with volunteers, as they would have been able to devise a means of avoiding encounters. This is supported by comments from the volunteers, that show they can easily tell whether a visitor wishes to interact or not:

“You know immediately whether they want to know [information].” (Volunteer, Fountains Abbey)

“Some people don’t ask questions, so you have to let them alone.” (Volunteer, Knole)

“The way we approach visitors is important.” (Volunteer, Yorkshire Sculpture Park)

This is supported by the data reported in Table 7.12, which noted that visitors’ expectations were met in 205 out of 236 reported cases. Therefore, the visitors in the study sample may have interlocked with the volunteers, leading to positive comments about their encounters. In Table 7.16 the key words, which refer specifically to the service encounter are *welcoming*, *help* and *provide service* and in Table 7.16 *added value*, *friendly*, *helpful* and *welcome*.

While *provide service* was cited only three times, the volunteers are aware of their role as frontline staff:

“We’re trying to sell it...” (Volunteer, Fountains Abbey)

“We’re the front-line troops for the first time visitor.” (Volunteer, Avoncroft Museum of Buildings)

“If we don’t make a fuss of them [the visitors] they won’t come back.” (Volunteer, Severn Valley Railway)

*Help visitors* was cited an equally infrequently seven times and refers in all cases providing information:

“Help the visitors [who] come along to learn about the house.” (Volunteer, Knole)

*Welcome*, however, received 15 citations:

“Welcoming them to a particular room...” (Volunteer, Knole)

“We pride ourselves on welcoming visitors.” (Volunteer, Brodsworth Hall)

“Everyone likes a welcome, don’t they?” (Volunteer, Avoncroft Museum of Buildings)

“Undoubtedly it’s important to give as good a welcome as possible.” (Volunteer, National Railway Museum)

Thus, while volunteers appear to be aware of the role they play in welcoming visitors to the museum or heritage visitor attraction and in the production of the overall visitor experience, the number of service encounter-related citations is still low and it seems, therefore, that service is not viewed by the volunteers as their primary role. However, the volunteers’ comments give the occasional hint that perhaps the visitors do sometimes view the volunteers as part of the service:

“Occasionally in the abbey you get a tip to put in the fund, sometimes a standing ovation.” (Volunteer, Fountains Abbey)

*Welcome* was cited less frequently by the visitors, which is particularly significant as the visitor sample is much larger than that of the volunteers. *Welcome* had only four citations in Table 7.16. However, *added value* was stated 16 times and *helpful*, 15 times. Indeed, they were the third and fourth most cited benefits for the visitors from volunteer interaction. Yet again *helpful* referred in all but two citations to providing the visitors with additional information or answering their questions. The only two citations which mention volunteers’ helpfulness as separate from their information-giving were:

“She [volunteer] was very helpful, lifting my son over a large step and taking him into the cabin area.” (Visitor, Cutty Sark)

“Both children were allowed on the footplate of the returning steam train on the way back from Bridgnorth.” (Visitor, Severn Valley Railway)

The other 13 citations of *helpful* equate to helping the visitors by providing information:

“They [the volunteers] were very helpful and knowledgeable” (Visitor, Knole)

“They [the volunteers] were very helpful and quite knowledgeable about the house and family.” (Visitor, Brodsworth Hall)

Visitors’ comments suggest that rather than being an expected part of the visit, the volunteers provide an extra bonus, *added value*, which was cited 16 times by visitors in Table 7.15:

“The added value of the information from the stewards.” (Visitor, Brodsworth Hall)

“[The volunteers] Made the visit more enjoyable and memorable.” (Visitor, Amberley Museum)

“They add greatly to the enjoyment of the day.” (Visitor, Avoncroft Museum of Buildings.)

Therefore it seems likely that the visitors would still enjoy their visit, although interaction with volunteers can enhance their experience. Thus, while forming part of the service product – the visitor experience – volunteers are an additional part and not necessarily expected. This is highlighted by one volunteer’s comment:

“Nearly all [ visitors] express their thanks.” (Volunteer, Kinver rock houses)

#### The host-guest encounter

The host-guest encounter takes place between tourists and tourees and is a form of service encounter. Host-guest encounters aim to have longer term outcomes than a service encounter might, for example, in educating the tourists about the culture of the country they are visiting. The term ‘host’ also encompasses not just good service, but hospitality, which implies an important welcoming function. Pearce’s six characteristics of a host-guest encounter, Box 3.6 (Pearce, 1982), note three factors which were typically not the case in this study: the contact is asymmetrical in terms of the guest’s money and status and the host’s knowledge, that the situation is novel for the visitors and that there is usually an important cultural difference separating the participants. While the visitors’ income and status was not measured, since the majority of visitors were in full-time work, while the majority of volunteers were retired, there seems unlikely to be a significant difference in income. Moreover, both groups displayed a high level of educational attainment, which suggests that both volunteers and visitors enjoy a similar social status. However, the visitors’ comments do show that they learn from the volunteers, thus the volunteers possess a greater knowledge than the visitors. Secondly, Pearce states that the situation is novel for the visitor. As noted in Chapter Seven and above, the visitors were regular consumers of museums and heritage visitor attractions, thus the situation was typically not novel for them. Finally, the high level of educational attainment displayed by both volunteers and visitors suggests that there is no significant cultural difference between the two groups.

Pearce (1982) does note, however, that in a more advanced society, where the cultural differences between the participants is less pronounced, that host-guest encounters can lead to friendships, which can help sustain local institutions and promote pride in the locality. Moreover, Smith (1978) suggests that host-guest encounters, where the standards of living are similar, may be more beneficial for the participants. These considerations apply in the case of the volunteers and visitors interviewed in this study and this suggests that host-guest encounters are not always so transitory. In Table 7.15, the key words, which correspond with the host-guest encounter are *enjoy meeting people* and *welcome*. While *welcome*, discussed above, was cited 15 times, *enjoy meeting people* gained 56 citations, which clearly correlates to social opportunities, which was the volunteers' most important motive. Volunteers' comments show that both transitory and less transitory encounters are enjoyable:

“I like the foreigners. I hope they enjoy this country and I give a good impression.” (Volunteer, Fountains Abbey)

“Talking to nice people, getting different ideas, parting friends.” (Volunteer, Avoncroft Museum of Buildings)

“We get quite a few regular visitors, a few locals bring their grandchildren.” (Volunteer, Kinver rock houses)

“They've [visitors] gone away with a smile on their faces, they enjoy a human face.” (Volunteer, National Railway Museum)

Table 7.16 shows that *enjoyment* and *social* were not frequently cited by visitors, with only five citations between them, but *friendly* was the second most frequently cited benefit of volunteer interaction. Moreover, *comfortable* was cited nine times, thus, volunteers help to make the visitors feel at ease. This is supported by the volunteers' comments, which show again that the volunteers can add something extra to their visit:

“The human touch makes the place seem more friendly.” (Visitor, Fountains Abbey)

“They tell you stories or lesser known gossip – the place takes on a personal character.” (Visitor, Knole)

“Their knowledge, with friendly, but not pressurised talk.” (Visitor, Brodsworth Hall)

“I felt welcome and comfortable.” (Visitor, Avoncroft Museum of Buildings)



“Social contact enhances the visit and creates a pleasant memory that I want to repeat.” (Visitor, Cutty Sark)

For both volunteers and visitors, interaction forms an important social role, which helps to meet volunteers’ motivational needs and contribute to a more personal visit for the visitors. The model for host-guest encounters encapsulated in Box 3.5 has already been found inaccurate when applied to the volunteers and visitors within the study sample. However, this is largely because of the emphasis host-guest studies have given to interaction between Western tourists and indigenous hosts. Researchers have suggested that a true host-guest encounter can only take place between cultural equals (Smith, 1978; Pearce, 1982) and this appears to be the case in this study. In addition, Table 7.17 showed that there is an increasing likelihood of making a positive comment about volunteers with increasing age. That is, older visitors were more likely to comment positively about the (older) volunteers. While this was not found to be statistically significant, this again suggests that the most satisfying encounters take place between similar individuals, both in terms of cultural background, educational attainment and age group. Thus, if encounters between volunteers and visitors are host-guest encounters, then a new model of the host-guest encounter, taking place between cultural equals needs to be devised.

Smith (2001) suggested a specific type of host-guest encounter, which occurs within the museum context and where she calls the hosts ‘culture brokers’. The term culture broker suggests that the host is specifically passing on cultural information or capital to the guest and thus this seems to bear a close resemblance to the third model for the volunteer-visitor encounter, peer tutoring.

#### Peer tutoring

Peer tutoring is learning that takes place between equals and is mutually beneficial. Topping describes peer tutoring as:

“People from similar social groupings who are not professional teachers helping each other to learn and learning themselves by teaching.” (Topping, 1996: 55)

Thus, peer tutoring in the UK is a non-professional, largely voluntary activity. Peer tutoring has been successful both with same age and cross age groups (Topping, 1996), moreover, a good peer tutoring programme is not too strictly structured and tutors

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“The interchange of ideas – quite often you get back more than you give out.”  
(Volunteer, Avoncroft Museum of Buildings)

“I prefer to guide someone who is obviously interested.” (Volunteer guide, Cutty Sark)

“You get all sorts of people: rail enthusiasts from other countries.” (Volunteer, National Railway Museum)

Moreover, the limited training provided for volunteers by the different case studies, as shown in Chapter Six, suggests that volunteers are able to introduce their own personality, as recommended by Goodlad (1995):

“I tend to – in my walk about with visitors - concentrate on aspects of its building and the impact that buildings had on the social structure of Yorkshire, as opposed to the religious aspect or quite a lot of other aspects that one could develop.”  
(Volunteer guide, Fountains Abbey)

Table 7.16 shows that for visitors, learning was the main benefit from interaction with volunteers, with 93 citations:

“A little knowledge encourages a need for more.” (Visitor, Fountains Abbey)

“They shared information not always on a placard or brochure.” (Visitor, Knole)

“Frequently they gave a more detailed knowledge than what is contained in the guide books.” (Visitor, Amberley Museum)

“The explanations made it more interesting.” (Visitor, Cutty Sark)

Thus, while learning benefits were not the most frequently cited outcomes for volunteers in Table 7.15, there seem to be several aspects of the volunteers' role, which correlate with peer tutoring. They are not professionals and are aware of this, they are able to introduce their own personality or interests to their interaction with visitors and *sharing learning* is a key benefit of encounters with visitors. However, Chapter Six noted that at the National Railway Museum volunteers can only provide non-teaching support, so can interaction between front-of-house volunteers and visitors constitute peer tutoring? For the visitors, this seems less complex. Table 7.16 shows that *learning* far outweighs any other benefit from interaction with volunteers. In addition, the cross tabulations reported in Tables 7.17 and 7.18 reported that older visitors were more

likely to report favourable encounters with volunteers, which suggests that cross-age peer tutoring is less effective in this context and that visitors with a higher level of educational attainment were more likely to enjoy encounters with volunteers. Since the volunteer sample also has a high level of educational attainment, this again suggests that in this context, peer tutoring between genuine peers, where the level of information passed from the tutor to the tutee is not too ambitious, is most beneficial.

### **8.8 The volunteer-visitor encounter**

The discussion of the three models of volunteer-visitor encounters encapsulated in hypotheses H2-4 is inconclusive. There were elements of each model, which were supported by the empirical data, but there were also contradictions within each model, which meant that they were not applicable to the study samples. The volunteers' role is to welcome the visitors and answer their questions and the key benefits they gain from interacting with the visitors are social opportunities and learning outcomes. The key benefits gained by the visitors are friendliness, added value and learning outcomes (helping was found to most commonly relate to learning as well). This suggests that the volunteer-visitor encounter constitutes a combination of the host-guest encounter and peer tutoring. Although the pure service elements, represented by *provide service*, *helpful* (meaning to help, rather than assist in gaining knowledge), were not sufficiently evident, some elements of the service encounter must be considered as well.

Volunteers are typically older, retired individuals, with an above-average level of educational attainment. They are initially motivated to volunteer by their subject interest, but social opportunities are more important in keeping the volunteers motivated along with their level of commitment. These front-of-house volunteers are engaging in a leisure activity and they consider their role at the museum or heritage visitor attraction as welcoming the visitors and answering their questions. However, this is not one-way learning. Volunteers are aware of the limitations of their own knowledge and they enjoy learning as much from the visitors as they are able to inform themselves. The social interaction with the visitors constitutes a very important part of the volunteers' motivation, which is illustrated by volunteers' comments:

“I don't like it when they don't ask questions.” (Volunteer, Brodsworth Hall)

“It can get very boring without visitors.” (Volunteer, Avoncroft Museum of Buildings)

However, this enthusiasm for visitor interaction does not mean that volunteers are not able to hold back if the visitors want to avoid an encounter:

“We exercise our discretion as to whether our approach will be welcomed.”  
(Volunteer, Brodsworth Hall)

From the volunteers’ point of view it seems that their role is a combination of sharing information and general social interaction.

The visitor sample within this study consists of regular visitors, who have a clear idea what to expect and have a high level of educational attainment. Thus, they are likely to already have some degree of knowledge prior to their visit. This is supported by the cross tabulation in Table 7.17, which shows that there is a correlation between visitors’ level of educational attainment and the likelihood of commenting positively about their encounters with volunteers, which suggests a relationship between visitors’ level of education and enjoyment of interaction with volunteers. The highest scoring benefit for visitors, from volunteer interaction, was *learning* (see Table 7.16), followed by *friendly* and *added value*. Thus, from the visitors’ point of view, the volunteers’ role is one of adding value, by providing additional information from outside the guidebook, which makes the visit more personal and providing a friendly face.

Like volunteering, visiting is an enjoyable leisure activity. Hood’s criteria were devised based on a study of visitors to an art museum. Volunteers are able to contribute to creating this enjoyable leisure experience for visitors by making them feel comfortable in their surroundings, giving them the opportunity to learn, enabling them to participate actively and engage in social interaction. Thus, front-of-house volunteers have an important role to play in creating the enjoyable leisure experience for visitors. However, visiting may also constitute serious leisure. Enjoyable leisure and serious leisure share characteristics, such as the opportunity to learn and social interaction. Stebbins has argued that cultural tourism, as a liberal arts hobby, is a form of serious leisure (Stebbins, 1996b). Visiting museums and heritage visitor attractions for the regular visitor, may be serious leisure. Visiting could also be casual leisure for the occasional visitor, although this theorisation goes beyond the boundaries of this study.

The characteristics of the volunteer-visitor encounter are presented in Table 8.1 and Box 8.1:

**Table 8.1 The volunteer- visitor encounter**

<b>Characteristics</b>	<b>Volunteers</b> Non-professional Leisure-seeker	<b>Visitors</b> Experienced heritage visitor Leisure-seeker
<b>Anticipated outcomes from encounters</b>	Social interaction Mutual learning	Information A friendly face Added value – additional, quirky information, in addition to other forms of interpretation

Table 8.1 shows that the volunteer-visitor encounter is a combination of the host-guest encounter and peer tutoring, using characteristics of both type of encounter:

**Box 8.1 Characteristics of the volunteer-visitor encounter**

- Personal relationships may be transitory
- Both parties are familiar with the situation
- Encounters take place between cultural peers
- Both parties are leisure-seeking
- Both parties are oriented towards mutual learning
- The contact may be asymmetrical in terms of the hosts' knowledge and the guest's desire to learn

The conceptualisation of the visitor-volunteer encounter presented in Box 8.1, while contributing to the theoretical development of this field of study, also provides several more practical benefits for managers of museums and heritage visitor attractions. It clearly establishes the outcomes that both parties are hoping for, as well as alerting managers to possible problem areas. For example, this model is applicable to regular visitors, for whom encounters with front-of-house volunteers are not unusual. These visitors have already constructed a template, by which they are able to conduct the interaction and gain the most beneficial outcomes. However, occasional visitors, or first-time visitors may require some additional assistance in interacting successfully

with the volunteers, as they will not have had the opportunity to construct a template from previous experiences. This may equally be the case with visitors who are not cultural peers with the volunteers, for example, visitors from overseas. The type of information that visitors hope to gain from volunteers will also help managers in designing information packs for volunteers and formal interpretation, such as guide books. Unusual anecdotes and 'historical gossip' could be retained for volunteers to pass on.

The model for volunteer-visitor encounters also draws on this study's findings about volunteer motivation more generally. Managers need to be aware of volunteers' social needs, particularly on quiet days with fewer visitors, where volunteers may be spaced out around a site or building and have no one to talk to for hours on end:

"You're rather isolated from the other volunteers. I had hoped to meet people."  
(Volunteer steward, Fountains Abbey)

Thus, consideration for the spacing of volunteers must be given, even at an organisation such as Knole, where there is a shortage of volunteers. This is particularly important, as volunteers typically help out once a week (BAFM, 1998), meaning that if their one day volunteering a week is dull, this will be more noticeable than if they were volunteering every day and only one day in the week was dull. Managers must be aware at all times that their front-of-house volunteers are leisure-seeking and that even serious leisure allows only for the occasional need to persevere (Stebbins, 1992).

### **8.9 Older volunteers**

The high proportion of older, retired volunteers within the heritage sector has been a consideration throughout this thesis. In particular, whether a greater understanding of the motivations of older volunteers within this sector can provide insights into increasing the involvement of older people across the wider voluntary sector. Chapter Three noted that as the proportion of active, older people within society grows, the UK government and the voluntary sector wish to harness this potential resource. Volunteering has benefits for both older people and society. Firstly, they would be considered as productively ageing. With increasing pressure for pensions and services to provide for a growing number of older, active people, who no longer work, government and the working sections of society would view older people more

favourably if they were seen to be making a contribution in return for these benefits (Davis Smith, 2000; Worcester, 2000). Secondly, Wearing (1995) and Stebbins (1998) believe that volunteering offers older people an opportunity for personal development and fulfilment in later life.

The sample of volunteers interviewed in this thesis were certainly predominantly older and retired. Table 7.2 shows that 63% of respondents were aged 60 years and above, while Table 7.3 shows that 75% of respondents were retired. Moreover, Table 7.7 lists 28 citations of *keeping active to retirement* as a motive for initially volunteering. The empirical evidence collected in this thesis suggests that for many respondents, it is the act of retirement that is the prompt for starting to volunteer, as reported in section 7.9. Clearly retirement and volunteering within museums and heritage visitor attractions are linked.

Chapter Three considered two theories for older people's involvement in leisure: reengagement and activity theory. Reengagement theory states that as people age, they gradually disengage from public life and their responsibilities. This may begin when their children leave home, but is particularly marked by the process of retirement. However, this relinquishing of responsibilities can also open up new opportunities and volunteering in retirement may be a process of reengaging with society. Indeed, while volunteering is a form of leisure, it also exhibits some features of work, which retired people have lost. These features include regular social contact with a group of colleagues, having a structure to the day and keeping the mind active and these are illustrated by the volunteer respondents:

“I'm retired so it's a place to meet people and be part of the world.” (Volunteer, Fountains Abbey)

“The necessity to be with people, learn something and make sure one does not vegetate in retirement.” (Volunteer, Knole)

“You must always have something planned, never get lethargic.” (Retired volunteer, Avoncroft Museum of Buildings)

The fieldwork found empirical data to support volunteering as a means of reengaging in retirement:



“After retirement [I was] seeking outdoor voluntary activities.” (Volunteer, Fountains Abbey)

“I needed to find something to do when retired.” (Volunteer, Brodsworth Hall)

“Something to do in retirement.” (Volunteer, Amberley Museum)

Activity theory considers individuals who continue to pursue the same interests and activities in retirement as they did before. Such individuals have been found to be more content than inactive older people (Atchley, 1993; Mannell, 1993; Kelly, 1997). However, older people are unlikely to pursue an entirely new leisure interest in retirement and are more likely to consider new ways of pursuing an existing interest. In the case of volunteering within museums and heritage visitor attractions, the role of subject interest is clearly significant, particularly as it was cited most frequently as the reason for initially volunteering in Table 7.7.

“I’m retired and I’ve always wanted to do this, so I wrote as soon as I could.” (Volunteer, Knole)

“I’ve always had a love of history and the year before I retired they were advertising for volunteers.” (Volunteer, Brodsworth Hall)

“As a lifelong railway enthusiast and recently retired, it’s a nice way of passing the time.” (Volunteer, National Railway Museum)

Indeed researchers have noted the decline in visiting among older people (Merriman, 1989; Smith, 1999) and activity theory may go some way to explain this. It has been suggested that volunteers are active visitors (McIvor, 1996) and it has also been noted that volunteers and visitors are at different stages of the life cycle, both within this study and elsewhere (Smith, 1999). While there is no causal evidence to support this, it may be that regular visitors are choosing to pursue their interest in heritage through volunteering. Thus, when regular visitors retire, they begin to volunteer and this career development would be commensurate with the concept of serious leisure, as the regular visitors would be pursuing a career, through their decision to volunteer, rather than simply visiting.

There is empirical evidence to support both theories, with a similar number of comments from volunteers stating that they are pursuing an existing interest, as those stating that this is an entirely new activity. However, the data examining volunteers’

reasons for initially volunteering suggests that activity theory may be more appropriate due to the large number of volunteers who cited subject interest as their reason for initially volunteering. What is particularly significant among the volunteers classed as reengaging through their activities, is that they were clearly aware that they needed to do something with their time:

“I needed to find something to do when retired.” (Volunteer, Brodsworth Hall)

“I was semi-retired and needed more to do with myself.” (Volunteer, Avoncroft Museum of Buildings.)”

This is supported to an extent by the literature, which notes that newly retired volunteers at museums and heritage visitor attractions are highly educated individuals, who have typically led active lives (Chambre, 1987; Worcester, 2000). However, while Chambre suggests that activity theory is more appropriate to these individuals, the data from this study suggests that these people are not always pursuing an existing interest, rather they are aware of their need to replace elements of their lives they have lost through retiring from paid work, such as a social network or mental challenges and that they have the confidence to seek these out through new activities. Thus, it seems likely that volunteering in retirement within the heritage sector is a combination of reengagement and activity theory. Activity theory seems to be the prompt behind the decision to volunteer in a museum or heritage visitor attraction, but volunteering per se is an opportunity to reengage and reclaim the positive elements of paid work:

“It’s difficult to keep up with people you know at work after you retire.”  
(Volunteer, National Railway Museum)

The importance of understanding the impetus behind a retired individual’s decision to volunteer is clearly linked to their motivation. This is particularly significant for managers within the heritage sector, due to the huge involvement of retired volunteers, but also to the wider voluntary sector, as they seek to recruit more from newly retired individuals. Retirement was frequently cited in Table 7.7 as the main reason for volunteering, thus any better appreciation of the impact of retirement on leisure activities can help both researchers and managers in understanding what motivates individuals to offer their services.

### **8.10 Chapter summary**

This chapter correlated the empirical data analysed in Chapter Seven with the conceptual framework of the thesis, presented in Chapters Two and Three. For front-of-house volunteers, volunteering was found to be a leisure activity, rather than unpaid work. However, while volunteering constitutes enjoyable leisure, and in many cases serious leisure, this is not inconsistent, from the volunteer's perspective, with the adoption of a professional approach to volunteer management.

The two research propositions were reconsidered and volunteers were found to be socially motivated, rather than pro-socially motivated. However, in considering the hypotheses, volunteers were found to be both intrinsically and extrinsically motivated. Intrinsic motivation was instrumental in volunteers' initial decision to offer their services, but extrinsic motivation was the most important motive for their decision to continue to volunteer. Thus, it appears that volunteers' motivation changes with length of service.

The importance of social interaction is demonstrated by Figure 3.3, the Interaction Model of Volunteer Motivation, which shows that a number of stakeholders interact socially with volunteers, including visitors. Hypotheses H2-4 aimed to model encounters between volunteers and visitors. An analysis of the three models, using the data presented in Chapter Seven, found that none of the models correlated exactly to the characteristics of, and benefits gained, from these encounters and a hybrid model was constructed which encapsulated this.

Finally, given the high proportion of older and retired individuals within both the sample and the study population, the relationship between retirement and the decision to volunteer was examined. Two opposing theories have been proposed for explaining this correlation and both were found to be relevant.

## **Chapter 9: Conclusions**

### **9.1 Introduction**

This thesis examined the motivation of front-of-house volunteers at museums and heritage visitor attractions in the UK. This chapter reviews the research questions and methodology, presents the contribution of this thesis, summarises the main findings of the study and the implications for volunteer managers and considers what further research would be useful.

### **9.2 Review of the research questions and the research process**

The voluntary sector is an under-researched sector and volunteering is an under-researched field (Ellis, 1985; Fischer & Schaffer, 1993; Pearce, 1993; Smith, 1999). This is partly because the voluntary sector is difficult to define (Davis Smith, 1995; Marshall, 1996; Lynn, 1997) and partly because volunteering takes place within public and commercial organisations as well. In spite of several studies examining volunteer motivation, little is still known about what exactly motivates people to give their time freely for the benefit of others (Lapham, 1988; Pearce, 1993; McCudden, 2000; Chappell & Prince, 1997; Deery, Jago & Shaw, 1997). Previous studies have been limited in a number of ways. Some researchers have examined motivation without considering the traditional motivation theories applied to work situations. Other researchers have concentrated on producing lists of motives, with no conceptual framework (Cnaan & Goldberg-Glen, 1991). Much research has focused on designing a means of identifying people with a propensity to volunteer in order to aid recruitment and has thus, taken a managers' perspective.

Museums and heritage visitor attractions provided a suitable sector to examine the motivation of volunteers due to the large number of volunteers involved and the high proportion of older, retired volunteers (Millar, 1991; Hall, 1995; Murch, 1999; Graham, 2000). This reliance on volunteers, particularly in front-of-house roles, which is a growing area of volunteer involvement (BAFM, 1998) and where they are the first-line contact for visitors, means that ensuring happy, motivated and enthusiastic volunteers is crucial to presenting a quality experience to the visitors. This is compounded by the

importance of repeat visiting and word-of-mouth recommendation to museums and heritage visitor attractions (Davies, 1994; Black, 2000).

Moreover, a comparison of the characteristics of volunteers across the voluntary sector and those specifically within museums and heritage visitor attractions found that both groups shared similar characteristics (Mattingly, 1984; Schegelmilch & Tynan, 1989; Fischer & Schaffer, 1993; Herzog & Morgan, 1993; Davis Smith, 1995; Walter, 1996; Foley & Graham, 1998), with both groups displaying a high level of educational attainment and a high socio-economic status. However, volunteers within the heritage sector tend to be older and retired, whereas the typical volunteer in other organisations is usually aged 45-54 years and working full-time (Davis Smith, 1998). Yet, this makes heritage volunteers an even more interesting group of individuals to examine, since the proportion of retired people within the UK population is growing and the UK government is keen to encourage older people to volunteer (Davis Smith 2000; Worcester, 2000). Thus, special consideration was given to the role of retirement in individuals' decisions to volunteer throughout this thesis.

Six surveys examining volunteering, five within the heritage sector (Mattingly, 1984; Davis Smith & Chambers, 1997; BAFM, 1998; Holmes, 1999; Resource, 2002) and one across the whole voluntary sector (Davis Smith, 1998) were reviewed in Chapter Two. This review revealed that the main reasons cited by volunteers for offering their services were: to help the organisation, to fill free time and to meet people. On the other hand, managers believed that subject interest was the biggest attraction for potential volunteers and attributed a low importance to social opportunities. Moreover, a comparison between the five surveys of volunteers within the heritage sector and the 1997 National Survey for Volunteering showed that not only did both groups of respondents share similar characteristics, but that both groups also reported similar benefits from their activities, which were: enjoyment, meeting people and personal development.

Chapter Three reviewed traditional theories of motivation to work (for example, Maslow, 1943; Vroom, 1964; McClelland, 1961; Herzberg, 1966; Hackman & Oldham, 1980; Locke & Latham, 1984) and found that they were not easily applicable to volunteers. Rather the literature on volunteering generally and more specifically on

volunteers' motivation, had developed along two apparently conflicting paradigms. The first, the economic paradigm, was the result of a series of influences and pressures, both external and internal, which impacted on the wider voluntary sector and specifically on the heritage sector. These included competition from other leisure providers (Hobday, 1998), management manuals from the US and Canada (Kuyper, 1993; Cooper, 1996) and pressure to increase professionalism throughout the sector (Babbidge & Ewles, 2000). This has resulted in the adoption of the practice of managing volunteers professionally, as unpaid staff. The practice of professional volunteer management has been promoted across the voluntary sector in the UK by recent publications on managing volunteers and this is encapsulated in McCurley and Lynch's (1998) model of professional volunteer management.

The second paradigm, the leisure model, considered volunteering as a leisure activity (Henderson, 1984; Stebbins, 1992; Parker, 1997a), as it is an activity entered into by the free choice of the participants, but is not classified as work as there is no financial gain. However, leisure theorists acknowledge that some work experience-seeking volunteers may use the activity as a route to paid work (Parker, 1997a; Graham, 2000). The leisure model focused on identifying individuals' reasons for volunteering and the benefits gained, rather than recommending better ways of managing volunteers. This raises managers' concerns that leisure-seeking volunteers will not be reliable (Pearce, 1993), but volunteering may be a serious leisure activity, which demands considerable effort and commitment on the part of the participant (Stebbins, 1992). The leisure model seemed consistent with the proportion of older, retired volunteers in museums and heritage visitor attractions. Within the heritage sector, the economic model is dominant and volunteer managers know little about what motivates their volunteers (Kahn & Garden, 1993; Hall, 1995; Walter, 1995; Croft, 2001). Moreover, researchers noted, that volunteers' motivation changes with length of service and that what attracted them initially may not be the same as what continues to motivate them (Pearce, 1993; Ilsley, 1990).

Two main motives for volunteering emerged from these two models. The economic paradigm suggests that volunteers wished to help the organisation. This is akin to altruism, but since researchers believe that few volunteers are genuinely altruistic (Schram, 1985) and that most expect to gain from their activities, it is referred to as

being pro-social. The leisure model suggests that social opportunities are the most important motive for volunteers. These translated into two opposing research propositions for the thesis: I Volunteers are socially motivated and II Volunteers are pro-socially motivated.

In addition, an interaction model of volunteer motivation was proposed and the role of the visitors in providing social interaction for front-of-house volunteers was considered in detail. Three models for the volunteer and visitor encounter were proposed: the service encounter, the host-guest encounter and peer tutoring. Together with the two research propositions this theorisation generated seven hypotheses:

- H1 Volunteers are motivated by social opportunities
- H2 Volunteer and visitor interaction is a service encounter
- H3 Volunteer and visitor interaction is a host-guest encounter
- H4 Volunteer and visitor interaction is peer tutoring
- H5 Volunteers are extrinsically motivated
- H6 Volunteering is something worthwhile
- H7 Volunteers are intrinsically motivated

Hypotheses H1-5 relate to research proposition I and Hypotheses H6 and H7 relate to research proposition II.

Chapters Four and Five set out the methodology for the thesis and reviewed the validity of the data. Two weaknesses were identified in previous studies: they had either adopted a quantitative methodology, which failed to explore issues such as motivation in depth (for example, the surveys discussed in Chapter Two), or had focused on only one or a limited number of case studies (Graham, 2000). A case study methodology was deemed to be the most suitable for investigating the study questions (Yin, 1994). Qualitative data were needed to investigate the volunteers' thoughts and feelings, while the context of the data collection was important if the impact of professional management procedures was to be considered. Therefore, the methodological approach taken sought to combine qualitative data while maximising the external validity of the data.

The heritage sector is extremely diverse (Swarbrooke, 1995; Drummond, 2001), thus consideration was given to differences in the number of volunteers involved in each organisation, geographic diversity and governing body, in order to maximise the external validity of the research. A function-based segmentation was used to conceptualise the population (the heritage sector) for the study and the three segments, which involved the highest numbers of volunteers, particularly in front-of-house roles, were identified (Hanna, 1998). Ten case studies were chosen from these three segments: National Trust properties, open air museums and transport preservation museums. Managers, volunteers and visitors at the ten case studies were interviewed, while documentary evidence was sought to support the interview data and increase the construct and conclusion validity of the study. The response rates were considered good for a study using this methodology (Yu & Cooper, 1983) and 222 volunteers were interviewed and surveyed and 509 visitors were interviewed across the ten case studies.

Data from the management interviews were analysed using a model for professional volunteer management (McCurley & Lynch, 1998) and a scoring system (Volunteer Management Orientation Score or VMOS) was devised in order to gauge how far professional procedures had been applied at each case study. The data from the volunteer and visitor interviews were analysed using a combination of content analysis (Weber, 1990; Silverman, 2001) and template analysis (King, 1998; Miles & Huberman, 1994). While the literature generated many of the key words used in the analysis, key words were also allowed to emerge from the data and care was taken not to divorce the numbers counted in the content analysis from the verbal responses (Miles & Huberman, 1994).

Chapter Six presented the ten case studies and the Volunteer Management Orientation Scoring system, with the scores for each of the organisations. None of the ten case studies gained a low score and four of the organisations gained a high VMOS showing the extent to which professional volunteer management procedures have been adopted within the heritage sector. Moreover, six of the case studies, that is over half of them, stated their intention to introduce more professional procedures, although the extent to which they will be able to do so will depend on resource constraints. However, the pressures and influences identified in Chapter Three, as instrumental in the introduction of professional volunteer management were evident at the two organisations with the

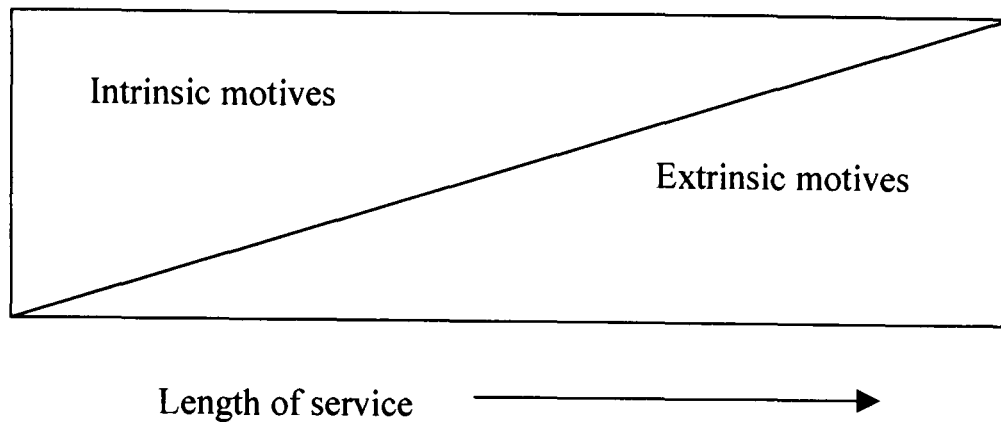


highest VMOS score: the National Railway Museum and the Severn Valley Railway. The National Railway Museum was required, through negotiations with the trade union, to provide a very clear definition of the role volunteers would play at the museum. In addition, both museums were governed by health and safety regulations and this has resulted in strict training programmes for volunteers at these organisations.

Chapter Seven presented the data analysis of the interviews with volunteers and visitors and this was discussed in Chapter Eight. A comparison of work-related motive citations and leisure-related motive citations suggests that volunteering is a leisure activity. However, there was little variation between volunteers' comments across the ten case studies, which suggested that the introduction of professional volunteer management procedures has little impact on the volunteers' enjoyment of their activity. Thus, it seems that there is no relationship between a high VMOS and the volunteers' motivation, which suggests that the polarisation between the economic and leisure paradigms considered in Chapter Three is not so significant.

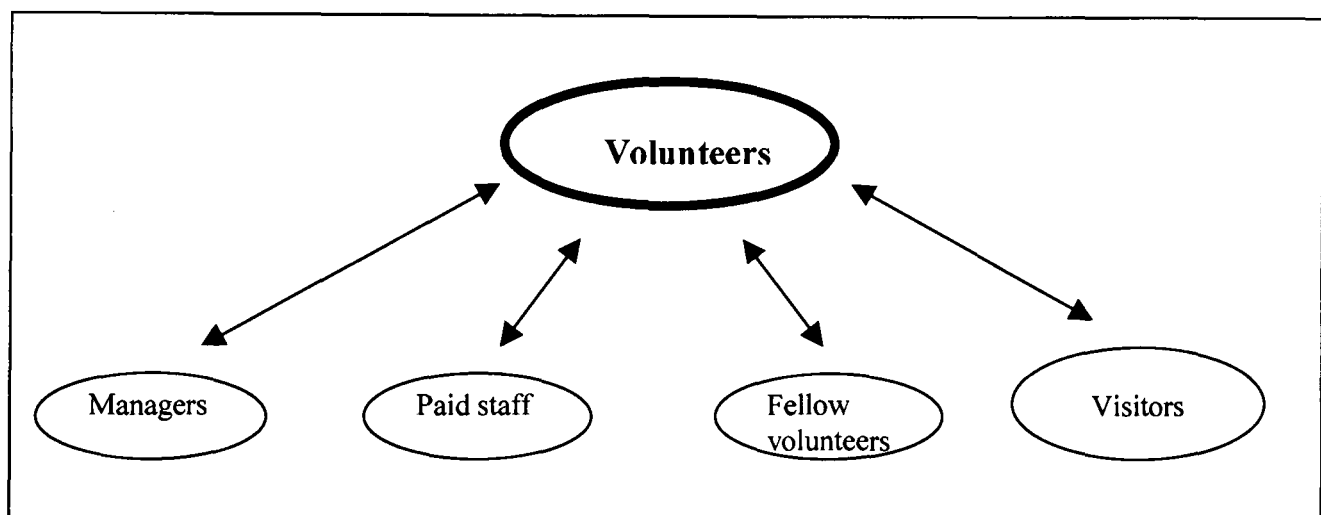
Volunteering constituted both enjoyable leisure and serious leisure. Indeed, volunteers displayed a high level of commitment and many had followed a career within their voluntary activities. The content analysis and the volunteers' comments showed that social opportunities far outweighed pro-social motives, that is wanting to help the organisation and do something worthwhile (H6), thus research proposition I was supported by the empirical data. While there was evidence to support research proposition II, this was small in comparison. However, as predicted in the literature review, volunteers' reasons for initially volunteering were found to be different from those which continue to motivate them. Intrinsic motivation (H7), and subject interest in particular, was the primary reason for volunteers initially offering their services, while extrinsic motivation (H5) and especially social opportunities (H1), were important in volunteers' decision to continue to volunteer. This is illustrated in Figure 8.2:

*Figure 8.2* Volunteers' changing motivation over time



Social opportunities included interaction with managers, fellow volunteers, paid staff and visitors, thus the Interaction Model of Volunteer Motivation, figure 3.3 provides a model for understanding volunteer motivation:

*Figure 3.3* An Interaction Model of Volunteer Motivation



The Interaction Model of Volunteer Motivation shows the impact different interactions can have on the volunteer's motivation. These may be interactions with paid staff, managers, fellow volunteers and/or visitors. The empirical data collected for this study found that all these interactions could have a positive influence on motivation. This model of motivation can be generalised to other circumstances within the voluntary sector, where the visitors would become the external users of the services provided by the volunteers. For example, in a charity shop, the visitors would be the customers, or in a meals-on-wheels service, they would be the recipients of the meals.

Chapter Eight reviewed three models of volunteer-visitor encounters: the service encounter, the host-guest encounter and peer tutoring. The data analysis suggested none of these models was accurate and a hybrid model was proposed, based on the benefits cited by both volunteers and visitors from their encounters with each other. This is summarised in Box 8.1:

**Box 8.1 Characteristics of the volunteer-visitor encounter**

- Personal relationships may be transitory
- Both parties are familiar with the situation
- Encounters take place between cultural peers
- Both parties are leisure-seeking
- Both parties are oriented towards mutual learning
- The contact may be asymmetrical in terms of the hosts' knowledge and the guest's desire to learn

As stated above, the role of retirement in relation to volunteer motivation was considered. Two theories were prominent in the literature: reengagement theory and activity theory. Reengagement theory states that volunteering is a means to reengage with society after an individual has disengaged from public life by retiring from paid work. Activity theory states that individuals rarely take up a new leisure pursuit in retirement and that volunteering is a continuation of an active life and an existing interest, rather than a new pursuit. There were an equal amount of empirical data to support both reengagement theory and activity theory. For some volunteers, retirement was an opportunity to pursue an existing interest in a new way and that these individuals were effectively active visitors. For other volunteers, the activity offered an opportunity to replace lost elements from their working lives, such as social opportunities, a structure to the day and a chance to keep their minds active.

### **9.3 Thesis contribution**

This thesis has made contributions in five areas of the field of study:

#### Literature review

In order to make a contribution to an existing body of knowledge, a thorough review of the existing work needs to be conducted and it is clear that previous researchers have not fully considered the extent of research on volunteering and have not looked outside their chosen discipline. This has served not only to create a disparate body of literature, with few links between the different branches and much repetition, but has also meant that the theoretical development of the field has been limited.

The review of literature in Chapter Three presents a synthesis of the literature on volunteering. The subject of volunteer motivation is an interdisciplinary topic and this synthesis drew together work from the disciplines of management, psychology and sociology. This synthesis also demonstrates the limitations of existing research, for example, the tendency of researchers to examine the motivation of volunteers in isolation from traditional motivation theories. Moreover, the literature revealed a polarisation between two bodies of research, which encapsulate two different models for viewing volunteering: the economic paradigm, which considers volunteers from the point of view of managers and seeks to promote better ways of managing volunteers; and leisure volunteering, which views volunteers from the benefits they gain from the activity. The economic model falls largely within management and psychology literature, while the leisure model is found mostly within sociological and leisure studies literature. This synthesis generated the interaction theory of volunteer motivation, discussed below.

#### Methodology

This research has adopted an approach designed to reconcile the complexities of the heritage and voluntary sectors and the need to generate detailed information that can investigate individuals' feelings and motives. As noted above, previous studies of volunteer motivation have either consisted of large, quantitative surveys (e.g. Holmes, 1999), or detailed studies of one case (e.g. Graham, 2000), or one type of case (e.g. Smith, 1999). Throughout this thesis a concern has been to maximise the external

validity of the data, while seeking to generate detailed qualitative responses. There are certain limitations in this approach, discussed in 9.5, however, the use of a relatively large number of case studies and both a large number of volunteer and visitor respondents, means that the conclusions from this thesis enable not only theoretical advances to be made, as is more typically the case with case study research (Yin, 1994), but that the results can be generalised both across the heritage sector and, to an extent, volunteering within the UK as a whole.

#### Volunteer Management Orientation Score

This thesis has discussed professional volunteer management throughout. However, the literature has not generated one single definition of what constitutes a model of professional volunteer management and, indeed, there is disagreement as to what procedures should be included within this model, for example, whether volunteers should be asked to sign volunteer agreements. This thesis took the model presented by McCurley and Lynch (1998) from their revised handbook on managing volunteers, which encompasses the general guidelines of professional volunteer management, and devised a scoring system for identifying whether professional procedures have been adopted by an organisation and whether there may be gaps. This scoring system generates a Volunteer Management Orientation Score (VMOS), which provides a crude means of assessing the level of professional volunteer management at an organisation.

The scoring system is open-ended, i.e. there is no top score, but a VMOS of 18 is high, while a VMOS of between eight and 12 is average. In the current climate of pressure to adopt professional volunteer management procedures, a low VMOS would be unusual and even Kinver, which seemed to adopt a very relaxed attitude towards the volunteers, gained a VMOS of nine. The VMOS scoring system is both a useful analytical tool and a means for management development. As an analytical tool, it enables the researcher to identify the reasons for gaining a high VMOS, using the breakdown of procedures, for example, at the Severn Valley Railway, health and safety legislation required a strict approach. For managers, the VMOS shows where there are gaps in the management process.

In addition, the use of the VMOS system in this research has identified key reasons why organisations have adopted professional volunteer management and this is due to

external pressures. In the cases in this study, both trade union negotiations and health and safety regulations have led to organisations gaining a high VMOS. Moreover, the adoption of professional volunteer management is highly resource-intensive, which explains why external pressures are so significant in its adoption.

### Volunteering and retirement

This thesis has contributed to the understanding of the role of retirement as a prompt for volunteering, given the high proportion of retired volunteers both within the sample and across the study population. The act of retirement itself is an important factor in volunteers' decision to offer their services, as noted in Table 7.7, where *keeping active in retirement* was the second most frequently cited reason for volunteering. Thus, while it is well known that many volunteers within the heritage sector are retired, it is the act of retirement, which prompts them to volunteer. This thesis found that volunteering offers a chance for individuals to pursue long-held interests in a new way (activity theory) and an opportunity to compensate for important aspects of paid work, including the loss of colleagues, the lack of a structured day, the lack of mental challenges and no longer serving a useful purpose to society (reengagement theory).

### Volunteer motivation

This thesis' most significant contribution is in developing a greater understanding of volunteer's motivation. The findings from this research show that for the volunteers in the study sample, volunteering is a leisure activity. However, their enjoyment of their activity is not hindered by professional volunteer management and this is likely to be related to the reasons why organisations have introduced these procedures, as noted above. In addition, two models of leisure were found to apply to volunteering: enjoyable leisure and serious leisure.

These two leisure sub-types share many characteristics: they are both challenging, enable the participant to learn and offer social opportunities. The characteristics that define an enjoyable leisure activity are: social interaction, new challenges, doing something worthwhile, feeling comfortable in one's surroundings, being able to learn and doing something active. Serious leisure, however, is characterised by the level of commitment displayed by participants, their acceptance of the occasional need to persevere and their pursuit of a career in the endeavour. Table 7.20 found that there

were nearly twice as many enjoyable leisure citations as for serious leisure. Thus, enjoyable leisure is clearly the more widely applicable of the two models. Yet, the significance of serious leisure must not be overlooked, particularly when combined with the number of commitment citations given by volunteers in Table 7.10 and the length of service offered by volunteers in Table 7.5. This means that volunteers are committed to the activity, which shows that they have invested heavily in the activity themselves, as a paid worker invests in their career. In many cases they have built up a sense of camaraderie with their fellow volunteers and sometimes with paid staff. This suggests that managers' concerns regarding volunteers' reliability, as voiced by Pearce (1993 – see section 9.2), are unfounded.

Therefore, this thesis has not only found that volunteering is a leisure activity, but it has provided two models of leisure activity which encompass volunteering and has measured these to distinguish which is the most relevant.

Volunteers' motivation was found to change from intrinsic motives, which initially prompted them to offer their services, to extrinsic motives, which are important in their decision to continue to volunteer, as presented in Figure 8.2, which proposes how intrinsic motivation is likely to decrease as extrinsic motivation increases, with length of service. Subject interest was the main reason why individuals decided to volunteer at an organisation, while social opportunities was the most important continuing motivation for volunteers. This change takes place very quickly, which suggests that new volunteers are looking for social benefits from the beginning and that the responses given in Table 7.7 merely helped them decide where they should volunteer. In addition, it is logical that volunteers would seek social opportunities with other individuals who share their interests:

“Meeting friendly, like-minded people” (Volunteer, Brodsworth Hall)

Volunteers were found to be pro-social, in particular this was a significant expectation of many of the respondents. However, pro-social motives were overshadowed by the benefits of social interaction and enjoyment of their activities. Social opportunities include interaction with managers, paid staff, fellow volunteers and visitors. This is illustrated by the Interaction Model of Volunteer Motivation, developed in this thesis, premised on the important role of social interaction in motivating volunteers.

The Interaction Model of Volunteer Motivation can also be used to examine what social opportunities are available to a volunteer, whatever their role in an organisation. As the model has shown in this study, there does not need to be a balance between the four groups represented in the diagram, that is social interaction could be provided by just one group of people, such as with paid staff, but there must be sufficient social contact to meet the individual's needs. Significantly, this study found that the level of interaction is not related to the extent professional volunteer management practices have been applied at an organisation. However, in this study this could be that these procedures had no impact on the important interactions for the volunteers, i.e. their interactions with visitors. Should professional management procedures, or other changes in the way that volunteers are involved in an organisation, interfere with these interactions, then the findings in this thesis suggest that volunteers will become demotivated and managers may find themselves short of volunteers, as they are not pro-socially motivated. Given the importance of volunteers to the heritage sector, as documented in Chapter Two, not to mention the wider voluntary sector, this is a very serious consideration.

As this thesis focused on front-of-house volunteers, particular consideration was given to the interaction between volunteers and visitors. This consideration was supported by the high number of volunteer comments stating that they enjoyed meeting people. This thesis found that visitors were primarily interested in learning, while the volunteers were more concerned with enjoyable social interaction, although they enjoyed sharing information and hoped to learn from the visitors in return. The characteristics of the volunteer-visitor encounter, a hybrid of the host-guest encounter and peer tutoring, are presented in Box 8.1. In addition, Tables 7.16 and 7.17 show that visitors with similar characteristics to volunteers are more likely to enjoy these encounters and achieve their expected outcomes.

Since particular consideration was given to maximise the external validity of these findings, it is possible to generalise these findings to the wider population of volunteers within the heritage sector and across the voluntary sector.



#### **9.4 Implications of the key findings of this study**

This section reviews the key findings of this study and their more practical application for organisations which involve volunteers, both within the heritage sector and elsewhere in the UK and for managers of volunteers. The most important conclusions from this study relate to volunteer motivation. For volunteers, volunteering is an enjoyable leisure activity. For a significant proportion of the volunteers, this is also a serious leisure activity, to which they are committed. Managers have expressed concern that volunteers, as unpaid workers, may not be reliable (Hooper-Greenhill & Chadwick, 1985; Pearce, 1993). However, the findings of this study show that the opposite is the case. Volunteers do have a different psychological contract with the organisation from paid staff, as they are not paid to be there, but they have given a lot to the organisation over the years and clearly gain important benefits from their activities. This investment and these benefits form the psychological contract between volunteers and their organisation. In order to ensure that these benefits are met, managers need to first understand what they are.

Volunteers' motivation changes over time. Volunteers are attracted to volunteer initially for different reasons as to why they continue to volunteer at an organisation. Pearce has suggested that because of this changing motivation, managers should stop worrying about how to attract volunteers, rather concentrating on keeping them (Pearce, 1993). Clearly, this is not practical for an organisation such as Knole, which wants to recruit more volunteers. Since subject interest is the most common draw for new volunteers, it would seem practical to target individuals who have already shown an interest. Moreover, given that social opportunities motivate volunteers to continue to help at an organisation, it is clear why word-of-mouth recommendation is the most common means of recruitment (see Chapter Two). As retirement has such a significant role in individuals' decision to volunteer, the most effective way of recruiting new volunteers would seem to be targeting individuals who are either newly retired or are about to retire and who have shown an interest in the organisation, or similar organisations. This explains the popularity of recruiting from Friends or member organisations related to the museum or heritage visitor attraction (e.g. Knole, Yorkshire Sculpture Park, National Railway Museum). In addition, managers could promote the benefits cited by continuing volunteers, if they wished to recruit more widely, in particular the social

benefits, the opportunities for personal development (learning, being challenged) and by referring to it as a leisure activity.

This recruitment advice could be adopted by all organisations seeking new volunteers and offers a method for encouraging greater numbers of newly retired individuals to volunteer, by emphasising the leisure and reengagement opportunities of the activity.

Managers must also consider the importance of social opportunities in the continuing motivation of volunteers. For example, in a country house such as Knole or Brodsworth Hall, if volunteer room stewards are spread out in different rooms, they are likely to be bored on a quiet day, with few visitors. As noted above, the Interaction Model of Volunteer Motivation can be used to examine which social opportunities are available to the volunteer, whatever their role in the organisation.

Modelling the volunteer-visitor encounter provides managers with a clear view of the benefits both groups hope to gain from this interaction. For the volunteers, these encounters offer a combination of friendly social banter and a chance to share information with the visitors. This helps managers to design appropriate training and development for volunteers. Chapter Six shows that current training for volunteers, while varying from case to case, focuses very much on practical aspects of customer care and how to do the job. Clearly, this is important as volunteers need to know what they are doing, but this seems to overlook both the volunteers' wishes to learn more about their subject of interest and the visitors' needs to learn interesting and unusual tidbits of information from the volunteers. Volunteers should be encouraged to add their own personality to their tour or the answers they give. Indeed, it may be more appropriate for volunteers to be managed by the education officer than the visitor services manager, since Box 8.1 shows that volunteers are engaged as much in tutoring as welcoming the visitors.

Heritage managers can use this information to help them design guidebooks and formal interpretation, while allowing the volunteers to pass on the quirky anecdotes that visitors expect to hear from them. In addition, it is clear that while regular visitors to museums and heritage visitor attractions can use the templates formed through previous encounters to enable them to interact with volunteers or not as they choose, first-time or

infrequent visitors may need some assistance in understanding the role of volunteers. A note on an entrance leaflet or in a guidebook could simply state that the volunteers are able to answer any questions, both practical and about the exhibition or property that the visitor might have.

Finally, the Volunteer Management Orientation Score system, while devised as an analytical tool for this study, also offers managers an additional tool for managing volunteers. This is a simple means of scoring their management procedures and identifying where there may be gaps in their application of professional volunteer management. Of course the VMOS is only useful for organisations, which wish to professionalise their volunteer management processes.

### **9.5 Thesis limitations**

The limitations of this thesis have already been considered in section 5.6. These focused on the methodological issues of sampling and fieldwork. The sampling limits were concerned with how representative the ten case studies are of the heritage sector. The high level of consistency of the volunteers' responses across the case studies suggests that it is very likely that the conclusions can be applied across museums and heritage visitor attractions in the UK. Moreover, the research aimed to be generalisable across the UK voluntary sector. While the modelling of encounters between volunteers and visitors is specific to the heritage sector, the general issues of volunteering as leisure, changing motivation and the role of retirement are likely to be applicable to volunteers elsewhere. Indeed, the role of retirement offers the wider voluntary sector a means of recruiting more successfully from the retired sector of the population.

Another sampling consideration is that this study focused on front-of-house volunteers. Clearly, it is more likely that individuals recruited to undertake a role which expressly involves interacting with lots of people, are motivated by social opportunities. However, the importance of social encounters with paid staff, managers and fellow volunteers must not be overlooked. While this study has specifically examined interaction between volunteers and visitors, behind-the-scenes voluntary activities are not devoid of social opportunities.

The fieldwork was also considered in section 5.6, which examined the problems encountered in interviewing volunteers and visitors. Interviewing both groups on site meant that interviews tended to be fairly short, although this varied as some volunteers were interviewed during their tea break and tour guides were able to take time after their tour to talk at length. Other methods could have been used, which did not interrupt the volunteers while they were on duty, including observation, which could have been used to examine encounters between volunteers and visitors. However, as noted in Chapter Four, observation alone would not have answered many of the questions as to why the volunteers participated in their activity. Moreover, observing the volunteers may well have influenced their actions.

However, there is clearly a trade off in any research project between the number of respondents and the depth of responses. As stated throughout this thesis, maximising external validity was a consideration of the study, thus the internal validity was limited.

Finally, the conclusions of this thesis have suggested that volunteers' motives change over time. These conclusions are based on volunteers' statements about why they initially volunteered and why they continue to volunteer. Clearly, a longitudinal study would have been able to examine these changes as they occurred, however, this was not practical within the confines of a doctoral thesis.

## **9.6 Further research**

This thesis has made significant contributions to the field of volunteering research, as detailed in section 9.3 above. However, any piece of research generates new questions. The thesis limitations were noted in section 9.5 above and of these the need for longitudinal research on the changing nature of volunteer motivation was stated. The repeat of Mattingly's study (Holmes, 1999), as noted in Chapter Two, was designed to give a longitudinal view of changes to volunteering within museums and heritage visitor attractions. Moreover, the National Centre for Volunteering has helped to develop a framework for such research through their regular national surveys of volunteering, and by their two surveys of volunteer management. However, there have been no studies involving the same sample, rather in the above examples the methodology has been replicated on the same study population. In particular, a longitudinal study examining individual volunteers' motivations over time, as theorised in figure 8.2, would be useful.

While a study of volunteers' continuing motivation would help to model the changes in motivation over time, investigating volunteers' reasons for leaving their voluntary activities would further shed light on what their expectations were and what benefits they hoped to gain. Particularly, as noted by the Museum Director for Amberley, as volunteers tend to stay for either a very short or a very long time. Finding out why these short term volunteers leave would give a more rounded picture of volunteer motivation, by questioning the unsatisfied as well as the satisfied volunteers.

This study has also concluded that older volunteers' decisions to offer their services are equally the result of a wish to reengage with society in retirement and due to a continuing interest or hobby, though perhaps choosing to pursue it in a different way. A longitudinal approach could also be used to examine the impact of retirement on individuals' decisions to volunteer in more detail. In addition to this study, several researchers have suggested that there is a causal link between the uptake of heritage volunteering at retirement and the decrease in visiting among older people. As many of the respondents in this thesis expressed subject interest as their reason for initially volunteering, it may be that volunteering is a form of visiting. This could be examined by plotting newly retired volunteers' visiting patterns both before and after retirement.

The Interaction Model of Volunteer Motivation provides a model for examining the social opportunities available to volunteers in more detail. In particular, since this study focused on front-of-house volunteers within the heritage sector, the interactions of behind-the-scenes volunteers could be modelled to see whether they do map onto the Interaction Model of Volunteer Motivation, although clearly the role of visitors in this model will be much less significant.

Chapter Seven suggested that there could be a relationship between the organisation's VMOS and the level of commitment from volunteers. While volunteers at case studies with a high VMOS gave a high number of *commitment* citations, volunteers at some organisations, which scored a low VMOS also cited *commitment* several times. The model of serious leisure also presented reasons for high levels of commitment on the part of the volunteer. Volunteers' commitment could be examined in more depth to establish if any particular variables have any impact on this.

The concepts of serious, enjoyable and casual leisure need to be further explored, not only in their relationship to each other and the world of work, as suggested in Figure 3.2, but in how far they may be applicable to visitors at museums and heritage visitor attractions, as discussed in Chapter Eight.

Finally, the characterisation of encounters between front-of-house volunteers and visitors presents a model for further investigating the relationship between volunteers in front-of-house roles at other organisations, across the wider voluntary sector and their users. While service motives were not frequently cited by volunteers or visitors in this study, it may be that for volunteers in different front-of-house roles and the users of their services, that these are more important.

This thesis has not only made significant contributions to the body of knowledge on volunteer motivation, but also provides a springboard for further research on volunteering (and volunteer management with VMOS) both within museums and heritage visitor attractions and across the wider voluntary sector.

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## Appendix 1

### Preliminary Interviews

#### Justin Davis Smith, Head of Research, National Centre for Volunteering

Justin Davis Smith is responsible for initiating and administering research into volunteers and voluntary organisations. He has administered the National Trust (Davis Smith & Chambers, 1997) and British Association of Friends of Museums (BAFM, 1991) surveys as well as the 1997 National Survey of Volunteering (Davis Smith, 1998). He also advises and publishes on good practice in volunteer management for the Centre.

Davis Smith reiterated the *professional* volunteer management process, as set out by McCurley and Lynch (1998), stating that organisations should formulate a volunteer policy, resource a volunteer programme with a coordinator, recruit volunteers as they would recruit paid staff, provide training and support, devise grievance and disciplinary procedures and ensure recognition through the payment of expenses and provision of social opportunities. Davis Smith did advise caution with one aspect of the US/Canadian model, which is the use of volunteer agreements. These set out a volunteer's responsibilities and the volunteer has to sign the agreement, similar to a contract with paid work. However, Davis Smith disagrees with volunteer agreements because of their unclear legal status and recommends ensuring that volunteers understand and agree to adhere to the organisation's expectations.

#### Peter Lassey, Museums Training Institute (now Cultural Heritage National Training Organisation)

The Museums Training Institute develops training strategies for all staff across the museums and heritage sector. They have collaborated with the BAFM project to develop generic training programmes which museums may adapt and also NVQs for museum staff and volunteers alike.

The Museums Training Institute's policy for training volunteers is no different from that for paid staff. However Lassey notes that funding for training volunteers is difficult to obtain and that the problems volunteers face are primarily due to a lack of resources,

such as staff time for adequate supervision. Since this lack of funds may be the reason for involving volunteers in the first place, then adequate resourcing for volunteers may be an endemic problem. Lassey also notes that as the job market within the museums and heritage sector is changing, with increasing numbers of part time staff and problems of low pay, the boundaries between volunteers and paid professionals are blurring and this may be an issue museums will have to address in the future.

Stephanie McIvor, Manager of Volunteer Programmes, National Museum of Science and Industry,

Stephanie McIvor set up the first volunteer programme within the National Museum of Science and Industry in 1995, after investigating volunteer programmes in Science Museums in the US and Canada. There were between twelve and fifteen volunteers active within the museum, but more were taken on during half-terms and National Science Week, where up to 50 volunteers were active. While the volunteer programme was a lot smaller than in some other organisations, the Science Museum has a strong union presence and every new volunteer post had to be ratified by the Union. The volunteers at the Science Museum were highly educated, with 80% having a second degree or working for one and they were mostly aged between 25 and 35. McIvor considered the status of the Science Museum as an initial draw for recruiting volunteers.

The rationale of the Science Museum volunteer programme was based on a student tutoring programme run by the Imperial College of Science, Medicine and Technology. The volunteers must receive benefits from the programme as well as the institution so that this is not exploitation and free labour, which the Union would view as taking away jobs. McIvor considered the main benefits of the volunteer programme were that they increased the museum's audience, by bringing in volunteers, they allowed the museum to do more with less resources and could enable individual staff members to be more experimental. The volunteers themselves were a means of advertising the museum and its activities through word-of-mouth recommendation and the visitors received a better service, whether it was an inquiry answered more promptly or a better answer because more research was being done in the curatorial department.

Pam Townsley, Volunteer Co-ordinator, Quarry Bank Mill

Quarry Bank Mill museum in Styal, Cheshire is an independent charitable trust, while the buildings and the site itself are owned by the National Trust who lease them to the museum. The volunteer programme is large, with over 250 active volunteers compared to 90 paid staff, both full and part-time. The Quarry Bank Mill charitable trust was established in 1978 with only the Director, his wife and their friends, so there was a volunteer presence at the site from its conception.

The volunteers are generally professional retired people as reputedly the catchment area for the mill has one of the highest incomes per capita in the UK. The volunteers are all required to join the Friends, who have their own committee, but the volunteers are managed within their individual departments.

Quarry Bank Mill has been cited as an example of good practice by the Carnegie Trust bursary scheme, and Pam Townsley has been to Australia to study volunteer programmes in heritage organisations there. She found that there was little difference between Australian volunteer programmes and those in the UK, although both aspire towards US and Canadian models.

Jane Walton, Professional Development Manager, Yorkshire Museums Council

Jane Walton supervises a few student volunteers at the Yorkshire Museums Council, but her main occupation is to organise suitable training for volunteers at museums and galleries throughout the region. Walton advocates formal recruitment, advertising the post, producing a job description and interviewing applicants. The Yorkshire Museums Council uses three-month volunteer agreements, which Walton states should include information such as if travel or other expenses are reimbursed. The agreement also states the volunteer's hours of work, which Walton believes is important for student volunteers, who are gaining work experience.

Walton noted that the types of people volunteering in museums in Yorkshire varies across the region. In North Yorkshire the volunteers are mainly retired, but in South and West Yorkshire, where there are university cities, there are many graduates volunteering. Walton believes that the *professional* model of volunteer management is being assimilated in the region, particularly in all-volunteer museums and that this is the

result of both museum registration and the National Lottery. However she also suggests that this could be a response to the fear that traditional sources of volunteers may be drying up.

## Appendix 2

### The British Association of Friends of Museums Volunteers Training and Development Project

#### Regional Focus Group, Merchant Adventurers Hall, York, 1/10/97

*Attendance:*

Jane Walton, Yorkshire Museums Council  
 Peter Walton, BAFM  
 Yorkshire Archaeological Trust  
 Kelham Island Museum  
 Murton Museum of Farming  
 Wakefield Cathedral  
 The ARC  
 Yorkshire Air Museum  
 Horsforth Museum  
 National Trust Yorkshire Region Volunteer Coordinator.

*Key points:*

Volunteers have to be motivated differently from paid staff.

Various participants have experienced problems dealing with volunteers. These are associated with older volunteers. Participants believed that as volunteers aged, they became more resistant to training and signing their name to formal documents. At the Yorkshire Air Museum a group of male volunteers acted like a 'boys club' and would not carry out their responsibilities around the site, "You can't tell that age group to do anything". However The ARC reported problems in motivating younger volunteers as well.

Formal guidelines were thought to be off-putting to more casual volunteers. The ARC had suggested introducing job descriptions for the trustees, but the trustees would not accept these.

#### Regional Focus Group, South East Museums Service, London, 2/10/97

*Attendance:*

Jane McKinley, Training Officer, SEMS  
 Peter Walton, BAFM  
 Barnet Museum  
 Crystal Palace Museum  
 National Trust Volunteer Coordinator for London and the Chilterns  
 Wimbledon Society Museum  
 Brunel Exhibition, Rotherhithe  
 Hampstead Museum  
 Harrow Museum  
 London Canals Museum



*Key points:*

The term 'best practice' should not be used when talking to volunteers. Some participants felt that museums were too varied to have any common 'best practice'.

Volunteer recruitment is much easier if the museum is only open one day a week. However, training is difficult as there are often long gaps between volunteers' shifts.

Induction should be so informal that it is not recognised as induction. One participant believed that training standards should be incorporated into the requirements for museum registration.

The National Trust representative was in the process of drawing up a manual for volunteer management. She commented that volunteers found management language very emotive and that terms such as 'job descriptions' had to be avoided.

## Appendix 3

### Letter sent to prospective case studies

Address

Date

Dear XXXXX,

My name is Kirsten Holmes and I am a research student at Leeds University Business School. My PhD project is an investigation into how volunteers and visitors interact at heritage attractions, please see enclosed summary.

I am writing to ask if your organisation would be willing to take part in this study. This would in the first instance only involve a short interview with yourself or whoever is responsible in your organisation for volunteer and/or visitor management. If your organisation was chosen as a possible case study venue, this would involve further interviews with volunteers and visitors, over a period of 2 or 3 days.

These interviews would provide your organisation with valuable information about your volunteer workforce, in particular their reasons for volunteering and the benefits they reap, and give you an insight into your audience, their perceptions of your staff and what they remember about their visits.

Any information gathered from this work is expressly for use in my PhD project, and not for commercial use. I would be very grateful if you would consider taking part in this study and look forward to hearing from you.

Yours sincerely,

Kirsten Holmes  
Researcher  
Direct Line: 0113 233 6855  
Email: [ecokjh@leeds.ac.uk](mailto:ecokjh@leeds.ac.uk)

## Appendix 4

### Interview Schedules

#### Management Interview Schedule

**Name**

**Date**

**Organisation**

*Ask if the interviewee objects to being tape recorded. If not, ensure the cassette is ready, the counter is at 0 and both the microphones are switched on.*

**Start recording.**

*Explain the purpose of this research project, that it will involve interviewing volunteers and visitors on three occasions: a week day not during school holidays; a weekend day and a week day in school holidays. The bulk of this work will be done by the end of September.*

*The organisation will receive a summary report of the research findings at that particular organisation.*

*Find out who else should be interviewed as part of the management interviews.*

#### **Volunteers**

1. How long have volunteers (as a group, not individuals) been involved in this organisation?

2. What activities do volunteers at this organisation undertake? (probe: what is meant by research? Do the volunteers receive training?)

Administrative/Funds/Committees	<input type="checkbox"/>
Cataloguing/Documentation	<input type="checkbox"/>
Conservation/Restoration	<input type="checkbox"/>
Curatorial training	<input type="checkbox"/>
Display/Exhibitions	<input type="checkbox"/>
Excavation/Fieldwork	<input type="checkbox"/>
Finds processing	<input type="checkbox"/>
Guiding/Interpretation	<input type="checkbox"/>
Management	<input type="checkbox"/>
Research	<input type="checkbox"/>
Sales/Information	<input type="checkbox"/>
Other	<input type="checkbox"/>
Please specify: _	

3. How long have volunteers been involved in these activities?

4. Why were volunteers first involved in this organisation?

4A. Is this related to the museum's mission, the management committee's vision or one curator?

5. How many volunteers are there currently working at the museum?

6. How many are involved in front of house activities?

7. Has the number of volunteers working in your museum increased, stayed the same or decreased over the past two years?

Increased

Stayed the same

Decreased

Please give reasons:

8. Has the number of man-hours worked by volunteers at your museum increased, stayed the same or decreased over the past two years?

Increased

Stayed the same

Decreased

Please give reasons:

9. Does your museum have a Friends Group?

YES  NO  PLANNED

10. What are the aims of the Friends Group?

Please tick all boxes that apply

Fund-raising

Guiding/Interpretation

Conservation/Restoration

Curatorial

Social

Other

Please specify:

11. Is volunteer work within your museum restricted to members of the Friends Group?

YES  NO  DON'T KNOW

12. Please estimate the proportion of your Friends who actively volunteer.

13. Altogether, how many hours do your volunteers work in your museum, on average, each week?

Less than 5

Between 5 and 10 hours

Between 10 and 15 hours

More than 15 hours

Other

Please specify:

14. How many hours do staff members spend in supervising volunteers, on average, each week?

15. How much do the volunteers cost:

In terms of training?

In terms of facilities?

In terms of staff hours?

16. Have you ever given these hours an economic value?

17. Do volunteers have any involvement in decision-making within the organisation?  
Yes  No  Don't Know

17A. If YES, how does this work in practice?

17B. If NO, why not? Have the volunteers ever requested involvement?

18. Does your museum provide volunteers with recompense for any of the following:  
**Please tick all boxes that apply**

Travel expenses	<input type="checkbox"/>
Other expenses	<input type="checkbox"/>
Honorarium (agreed fee)	<input type="checkbox"/>
Discounts, trips, free admission etc.	<input type="checkbox"/>
None	<input type="checkbox"/>
Other	<input type="checkbox"/>
Please specify:	

19. Does your museum have one person who is responsible for the organisation of volunteers on a day-to-day basis?

YES  NO  DON'T KNOW

20. If YES who is this person ?

Paid volunteer coordinator	<input type="checkbox"/>
Museum director/manager	<input type="checkbox"/>
Relevant curator	<input type="checkbox"/>
Other member of paid staff	<input type="checkbox"/>
Voluntary volunteer coordinator	<input type="checkbox"/>
Other member of volunteer group	<input type="checkbox"/>
Other	<input type="checkbox"/>
Please specify:	

21. Does your museum have any written conditions of service for volunteers working at the museum?

YES  NO  DON'T KNOW

If YES, please give details:

22. Does your museum have any evaluation procedures to measure the standard of volunteer work?

YES  NO  DON'T KNOW

If YES, please give details:

23. Which methods do you use to recruit volunteers?

- Volunteers offer their services
- Volunteers invited
- Lectures
- Local media/appeals
- Local societies
- Volunteer bureaux
- Interest through school and projects
- Other
- Please specify:

24. Do you employ any selection methods to ensure the suitability of prospective volunteers?

- YES  NO  DON'T KNOW

25. If YES, which methods do you use?

**Please tick all the boxes that apply**

- Interview
- References
- Tests and/or exams
- Other, please specify:

26. Do your museum offer your volunteers training?

- YES  NO  DON'T KNOW

27. If YES, who is responsible for the training?

- Paid volunteer coordinator
- Relevant curator/keeper
- Voluntary volunteer coordinator
- Other member of volunteer group
- Both paid and volunteer staff
- Other

Please specify:

28. Please give details of the training provided, including length of training and content:

29. Does your museum evaluate the success and adequacy of the training ?

- YES  NO  DON'T KNOW

If YES, please give details of assessments methods used to evaluate the training:

30. Does your museum have any formal disciplinary procedures for the volunteers?

- Formal Disciplinary  Informal Disciplinary  None

31. Does your museum have any formal dismissal procedures for the volunteers ?

- Formal Dismissal  Informal Dismissal  None

32. Are volunteers insured against the same risks as paid staff?

- YES  NO  DON'T KNOW

33. Does your museum have a special insurance policy for the volunteers?

YES  NO  DON'T KNOW

34. If YES, what is included:

Please tick all the boxes that apply

Accident to volunteer

Liability for injury to others

Liability for museum property

Museum liability for volunteer's actions

Other

Please specify:

35. In your opinion what proportion, in percentages, of your volunteers are men and what proportion women?

Men: \_\_\_\_\_ Women: \_\_\_\_\_

36. In your opinion which age category most accurately describes the majority of your volunteers ?

17 yrs and under

18-30 years

31-60 years

61 years +

37. In your opinion which education category most accurately describes the majority of your volunteers ?

Schoolchildren

No further education

Some further education

University/College Graduates

Post-graduates

Mixture

38. In your opinion how would you describe the socio-economic background of the majority of your volunteers?

Professional/managerial

Technical and Clerical

Skilled and Semi-skilled

Unskilled

Housewives/husbands

Students/graduates

Schoolchildren

Generally "middle class"

Mixture

38A. How do you know what the socio-economic backgrounds of your volunteers are?

39. In your opinion how far do the majority of your volunteers travel to your museum?

Under 5 miles

5-10 miles

11-15 miles

16-20 miles

21 miles+

40. In your opinion what proportion, in percentages, of your volunteers work at the following times:

Weekdays

Weekday evenings

Weekends

Vacations/ Bank holidays

41. In your opinion why does your museum involve volunteers?

Volunteers undertake tasks that would not otherwise be possible

They help with back-logs of work, e.g. documentation

Provide skills not available elsewhere in the museum

Provide a link with the community

Are a flexible and cost-effective work force

To provide work experience and training

To work on specific projects

Because without them we couldn't function

It's part of the governing body's objectives

Volunteers carry out pioneer and pilot work

Other

Please specify:

42. In your opinion, how does your organisation benefit from involving volunteers?

43. Why do you think volunteers are attracted to work in your museum?

**Please rank up to three answers, numbering them 1, 2 and 3, with 1 being the most important.**

Interest in subject

\_\_\_\_\_

To obtain museum work experience

\_\_\_\_\_

To support the museum

\_\_\_\_\_

To fill spare time

\_\_\_\_\_

To fulfil a social need

\_\_\_\_\_

They like the actual work involved

\_\_\_\_\_

Other

\_\_\_\_\_

Please specify

44. In your opinion what motivates your volunteers to come into work each time?

45. How do you define a volunteer at <Name of Organisation>?



**Visitors**

46. Does your museum charge admission?

No admission charge

No admission charge to local residents, charge to non-residents  
(with concessions)

Charge to all visitors (with concessions)

Other

Please specify:

47. How much admission does your museum charge for one adult, with no concession?

1p- 50p

51p- £1.00

£1.01- £1.50

£1.51- £2.00

£2.01- £2.50

£2.51-£3.00

£3.01-£4.00

Over £4.00

48. What experience does the museum aim to provide its visitors?

49. How can the volunteers contribute to the visitors' experience?

Reception

Stewarding

Guiding

Demonstrating

Interpreting

Education

Other, please specify:

50. Is the contact with visitors planned, such as a guided tour, or informal, such as at an information desk?

51. Does your organisation monitor the volunteer's contribution?

Yes  No  Don't Know

51A. If YES, how and when?

If NO, why not?

52. Are there any facilities at your museum for visitor feedback?

YES  NO  DON'T KNOW

53. What facilities for visitor feedback do you have?

Staff encouraged to note comments

Comments Book

Comments Box/Notice board

Self-completion Questionnaires

Interviewer-administered Questionnaires

Other

Please specify:

54. Do you provide any training in how to deal with visitors?

Yes  No

If Yes, please give details:

55. Do you think volunteers have any lasting effect on the visitor's experience?

56. Do you think the volunteers' contribution to the visitors' experience may have any impact on a visitor's decision to make a repeat visit?

57. Do paid staff undertake similar roles to the volunteers, in interacting with the public?

58. Do you know how long visitors spend on average in your museum?

59. What visitor facilities do you provide?

Cafe

Guided tours

Special events

Shop

Other, please specify:

60. Has your organisation undertaken any visitor or market research in the past 5 years?

If YES, please give details:

60A. Which visitors is your organisation seeking to attract?

61. Do you have a profile of your visitors?

62. Has your organisation ever asked the visitors what they think about the volunteers?

63. What promotional material does your organisation produce?

64. Where does your organisation advertise?

65. Have you ever had any visitor complaints about your volunteers?

**Thank the interviewee for their time and arrange dates for further interviews and the three volunteer/visitor survey days.**

**Switch off tape recorder.**

## Volunteer Interview Schedule

**Volunteer Survey Code:**

**Organisation:**

**Date and Time:**

1. How long have you worked as a volunteer at this place?
2. What first attracted you to work at this place?
3. Aside from your work in this museum, have you volunteered at any other heritage site?
4. Are you a National Trust member or a member of the Friends organisation?  
Yes  No
5. Aside from your museum work, have you worked as a volunteer anywhere else?
6. What were your expectations of volunteering at this site?
7. To what extent have these expectations been met?
8. What work do you do while you are here?
9. How often do you work here?  
More often than once a week   
Once a week   
Once a fortnight   
Once a month   
Less often than once a month
10. Who do you report to at this organisation?
11. Do you have any contact with the visitors? Please describe.
12. Do you enjoy this contact with visitors?
13. Do you think the visitors enjoy this interaction?  
13a. If so, how do you know? If not, why do you think that?
14. Have you ever met the same visitors twice?  
Yes  No  Don't Know
15. Do you think your contact with visitors has any influence on whether they visit again?  
Yes  No  Don't Know
16. Why do you continue to volunteer at this site?
17. What forms of recompense do you get out of volunteering here?

18. Are you able to claim expenses?

19. What other benefits, perhaps less tangible, do you get out of your work?

20. Are there any benefits you would like to get, that you currently do not?

21. Have you experienced any of the following disadvantages of being a volunteer at this museum? **Show Card**

- Takes up too much time
- Feel you are not fully accepted by the rest of the museum staff
- Uncertain about the value of the work to the museum
- Not enough support from or consultation with the museum staff
- Repeatedly doing the same work/ no opportunity to learn new tasks
- Lack expertise to do tasks confidently
- Other

Please specify:

22. Do you receive any training?

YES  NO  DON'T KNOW

23. If NO, why do you think this is?

- Not necessary
- Not available
- Other

Please specify:

23a. If YES, what is the nature of this training?

24. Do you know if you are insured as a volunteer at this place?

Yes  No  Don't Know

25. Does this organisation provide you with any written conditions for your service?

Yes  No  Don't Know

26. Does this organisation evaluate the work that you do?

Yes  No  Don't Know

27. Do you know whether this organisation has a mission statement or a statement of its aims?

Yes  No  Don't Know

**I have just a few questions that I would like to ask for classification purposes.**

28. Which of these best describes your highest qualification or nearest equivalent?

- School Certificate
- G.C.S.Es/O-Levels/C.S.Es
- A-Levels/BTEC
- HNC/HND/equiv
- Degree
- Postgraduate Qualification
- Professional Qualification
- Other

29. How would you describe your current employment status? **Show Card 5**

- Looking after the house
- Retired
- Student or at school
- Unemployed
- Working full-time
- Working part-time
- Other:

29a. What is your occupation/What was your occupation before you retired?

30. Note respondent's sex.

- Male  Female

31. Do you own or have regular use of a car?

- Yes  No

32. Could you tell me which age group you belong to? **Show Card 6**

- 18-24
- 25-34
- 35-44
- 45-54
- 55-59
- 60-64
- 65-74
- 75 and over

33. Finally, what is it that prompts you to come to work here each time?

**Thank you for your time**

## Visitor Entrance Interview Schedule

**Code:**

**Organisation:**

**Date and Time**

1. What prompted you to come here today?

- Day Trip
- Passing By
- On Holiday
- To Show Friends and Relatives
- Educational Visit
- Special Event
- Other, please specify

2. Have you travelled with anyone else today?

- Alone
- Partner
- Family
- Friends and Relatives
- Organised group
- Other

3. How did you travel here?

- Car
- Train
- Bus
- Foot
- Other

3a. Where have you travelled from today?

4. Have you been to this place before?

Yes  No

5a. If YES, why did you choose to visit again?

5b. If NO, what is the main purpose for your visit?

- To pass the time
- To see a particular exhibit
- To learn something
- To show children
- To attend a special event
- Social visit with friends
- To visit the shop
- To eat lunch
- As part of an organised group
- Other, please specify:

6. Have you visited any other museums, art galleries or sites of heritage interest during the past 5 years?

Yes  No

7. Can you tell me how many museums, art galleries or sites of heritage interest have you visited during the past twelve months?

None   
 1-2   
 3-5   
 6-10   
 More than 10   
 Don't Know

8. Are you a member of the Friends' Organisation?

Yes  No

9. Do you belong to any other historical, archaeological or environmental organisations?

Other Friends of a Museum or Art Gallery   
 National Trust   
 English Heritage   
 Local Historical or Archaeological Society   
 Environmental Organisation

**I have just a few questions that I would like to ask for classification purposes.**

10. Which of these best describes your highest qualification or nearest equivalent?

School Certificate   
 G.C.S.Es/O-Levels/C.S.Es   
 A-Levels/BTEC   
 HNC/HND/equiv   
 Degree   
 Postgraduate Qualification   
 Professional Qualification   
 Other

11. Which one of these work categories best describes you? **Show Card 2**

Looking after the house   
 Retired   
 Student or at school   
 Unemployed   
 Working full-time   
 Working part-time   
 Other:

11a. What is your occupation/What was your occupation before you retired?

12. Note respondent's sex.

Male  Female

13. Could you tell me which age group you belong to? **Show Card 3**

- 18-24
- 25-34
- 35-44
- 45-54
- 55-59
- 60-64
- 65-74
- 75 and over

14. How long have you lived in the area you are now living?

- Less than a year
- 1-3 years
- 4-10 years
- More than 10 years

**I hope you enjoy your visit.**



## Visitor Exit Survey

**Visitor Exit Survey Code:**

**1. What do you remember most about your visit today?**

---

**2. Did you talk to any of the stewards in the house?**

Yes  No

**3. If YES, did this enhance your visit in any way?**

Yes  No  Don't Know

Comments:

**4. Has contact with volunteers at a museum or site of heritage interest ever encouraged you to visit that place again?**

Yes  No  Don't Know

If YES, why was that:

**5. Has contact with volunteers at museum or site of heritage interest ever put you off visiting that place again?**

Yes  No  Don't Know

If Yes, why was that?

**6. Have you ever worked as a volunteer at a museum or heritage attraction?**

Yes  No

**7. What was the most satisfying part of your visit?**

Learning something

A pleasant place to spend time

Seeing something new or different

The cafe or the shop

The social side of the visit

Other, please specify

**8. How would you rate the quality of your visit ?**

Very good

Good

Adequate

Poor

Very poor

**9. In your opinion, is the welcome at this organisation:**

Very good

Good

Adequate

Poor

Very poor

**10. How long have you spent here today?**

- Less than ½ hour
- ½-1 hour
- 1-2 hours
- 2-3 hours
- More than 3 hours

**11. How far would you say this visit has met your expectations?**


---

**12. Is there anything you would like to have experienced today that you were unable to?**


---

**13. Do you think you will visit here again?**

- Yes  No  Maybe  Don't Know

If so, when? \_\_\_\_\_

**14. Do you think you are likely to visit another place like this one in the next 12 months?**

- Yes  No  Maybe  Don't Know

**15. How do you prefer to visit museums and heritage sites? Please tick one box only**

- As part of an organised group
- With a guided tour
- With a knowledgeable friend or family member
- Alone
- As a purely social visit
- Other:

**16. Which way do you prefer to gain information about a museum exhibit or heritage attraction? Please tick one box only**

- Information Panel
- Guide Book
- Information Steward
- Guided Tour
- Audio Tour
- Other, please specify:

**17. Have you attended any of the following in the past twelve months?**

- |                          |                          |
|--------------------------|--------------------------|
| Theatre                  | <input type="checkbox"/> |
| Classical Concert        | <input type="checkbox"/> |
| Pop Concert              | <input type="checkbox"/> |
| Ballet                   | <input type="checkbox"/> |
| Opera                    | <input type="checkbox"/> |
| Theme-park or Fairground | <input type="checkbox"/> |
| Cinema                   | <input type="checkbox"/> |
| Zoo or Wild-life Park    | <input type="checkbox"/> |

**Thank you very much for your time. Can you now please post this questionnaire to me or leave it at the admissions desk.**

## Appendix 5

### Covering Letter for the Volunteer Questionnaire

25th September 1998

Dear Volunteer,

#### Volunteers in Museums and Heritage Organisations

I am conducting a survey as part of a PhD project at Leeds University Business School to examine the needs and motivations of volunteers at museums and heritage sites. The aim of the project is to find out how volunteers are organised, how they would like to be organised, what benefits they get from their volunteering and what benefits they would like to get from their volunteering.

I would be very grateful if you could spare a few minutes to fill this survey in and return it to me in the freepost envelope provided, you do not need a stamp.

This survey is not for any commercial use. All responses are completely anonymous and will be viewed only by the researcher, and the organisation at which you volunteer.

For further information on this project please contact your Volunteer Coordinator, or myself, Kirsten Holmes.

Thank you very much for your time,

Yours faithfully,

Kirsten Holmes  
Researcher  
Direct Line: 0113 233 6855  
Email: [ecokjh@leeds.ac.uk](mailto:ecokjh@leeds.ac.uk)

## Appendix 6

### Volunteer Postal Questionnaire Survey

**Volunteer Survey Code:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

**Date and Time:** \_\_\_\_\_

1. How long have you worked as a volunteer at this place?

\_\_\_\_\_

2. What first attracted you to work at this place?

\_\_\_\_\_

3. Aside from your work in this museum, have you volunteered at any other heritage site?

\_\_\_\_\_

4. Are you a National Trust member or a member of the Friends organisation?

Yes  No

5. Aside from your museum work, have you worked as a volunteer anywhere else?

\_\_\_\_\_

6. What were your expectations of volunteering at this site?

\_\_\_\_\_

7. To what extent have these expectations been met?

\_\_\_\_\_

8. What work do you do while you are here?

\_\_\_\_\_

9. How often do you work here?

More often than once a week

Once a week

Once a fortnight

Once a month

Less often than once a month

10. Who do you report to at this organisation?

\_\_\_\_\_

11. Do you have any contact with the visitors? Please describe.

\_\_\_\_\_

12. Do you enjoy this contact with visitors?

\_\_\_\_\_

13. Do you think the visitors enjoy this interaction?

\_\_\_\_\_

13a. If so, how do you know? If not, why do you think that?

\_\_\_\_\_

14. Have you ever met the same visitors twice?

Yes  No  Don't Know

15. Do you think your contact with visitors has any influence on whether they visit again?

Yes  No  Don't Know

19. Why do you continue to volunteer at this site?

\_\_\_\_\_

## Appendix 6

20. What forms of recompense do you get out of volunteering here?

---



---

21. Are you able to claim expenses?

---

22. What other benefits, perhaps less tangible, do you get out of your work?

---

23. Are there any benefits you would like to get, that you currently do not?

---

24. Have you experienced any of the following disadvantages of being a volunteer at this museum?

- Takes up too much time
  - Feel you are not fully accepted by the rest of the museum staff
  - Uncertain about the value of the work to the museum
  - Not enough support from or consultation with the museum staff
  - Repeatedly doing the same work/ no opportunity to learn new tasks
  - Lack expertise to do tasks confidently
  - Other
- Please specify: \_\_\_\_\_

25. Do you receive any training?

YES       NO       DON'T KNOW

26. If NO, why do you think this is?

- Not necessary
  - Not available
  - Other
- Please specify: \_\_\_\_\_

26a. If YES, what is the nature of this training?

---

27. Do you know if you are insured as a volunteer at this place?

Yes       No       Don't Know

28. Does this organisation provide you with any written conditions for your service?

Yes       No       Don't Know

29. Does this organisation evaluate the work that you do?

Yes       No       Don't Know

30. Do you know whether this organisation has a mission statement or a statement of its aims?

Yes       No       Don't Know

**I have just a few questions that I would like to ask for classification purposes.**

31. Which of these best describes your highest qualification or nearest equivalent?

- School Certificate
- G.C.S.Es/O-Levels/C.S.Es
- A-Levels/BTEC
- HNC/HND/equiv
- Degree
- Postgraduate Qualification
- Professional Qualification
- Other