REF2021

Institution: University of Leicester	
Unit of Assessment: 17	
Title of case study: Understanding emotional management: improving volunteer management policy and practice	
Period when the underpinning research was undertaken: September 2017–2019	
Details of staff conducting the underpinning research from the submitting unit:	

Name(s):	Role(s) (e.g. job title):	Period(s) employed by submitting HEI:
1) Anne-Marie Greene 2) Jenna Ward	1) Professor of Work, Employment and Diversity 2) Associate Professor of Work, Organisation and Emotion	1) 1 September 2017–Present 2) 1 September 2017–2020

Period when the claimed impact occurred: September 2017–July 2020	
Is this case study continued from a case study submitted in 2014? N	

1. Summary of the impact

Collaborative research between the University of Leicester and the National Trust has identified unique, and often unspoken, emotional challenges involved in managing the Trust's 65,000 **volunteers across the UK**. This led to a series of interventions that: (1) substantially informed National Trust policy regarding the management of volunteers; and (2) demonstrably altered practice, via the development of new guidelines, training, and a toolkit designed to better manage the emotional difficulties encountered when directing and coordinating volunteers. This research has directly improved manager-volunteer relationships and volunteer manager wellbeing, and its success has prompted other voluntary organisations to implement similar changes.

2. Underpinning research

The University of Leicester has a long-standing partnership with the National Trust. The Trust manages 780 miles of coastline, over 250,000 hectares of land, over 500 historic houses, castles, parks and gardens and almost one million works of art. They are one of the largest membership organisations in the world with over 5,600,000 members. As a charity they depend on the skills and passion of more than 65,000 volunteers (2018/19), providing almost 4,800,000 hours of their time, working in a range of roles from beekeeping to firefighting. Since joining the University in 2017, Greene and Ward have built on this established relationship to undertake new research to support volunteer management.

There is increasing pressure for non-profit organisations to adopt for-profit practice and policy, despite a commensurate understanding that this approach is not always effective in managing staff who are not contractually obligated or financially driven. To develop a more specialised and nuanced policy and strategic plan for volunteer management at the National Trust, Greene, Ward, and voluntary sector practitioners, sought to better understand the lived experiences of volunteers and volunteer managers at selected National Trust sites.

A qualitative study **[R1]**, commissioned by the National Trust, was conducted at two National Trust properties to better understand the complexities of managing volunteers. Using an arts-based research design **[R3]** to explore the interpersonal interactions between managers and unpaid staff, they found that, in practice, the management of volunteers is significantly different to the management of paid staff. In particular, researchers identified the unique emotional challenges posed by managing 'affectively committed' volunteers; that is, volunteers motivated by a deep emotional attachment to the place, people, or organisation they are tasked with helping. At times, volunteers were resistant to change, non-compliant, more likely to publically criticize managers or organisational policy, and less concerned about regulating their own emotions. While researchers acknowledged that this passion is ultimately invaluable, these behaviours are nonetheless difficult to manage. For managers, directing and coordinating those without an employment contract can be "*a daunting and intimidating thing*" **[R1]**. The high dependency on volunteers coupled with a perceived lack of control meant that managers felt impotent, with negative concomitant effects on team wellbeing, effectiveness, and the ability to achieve organisational objectives.

These research findings led to a series of interventions designed to both improve the specific skills, practices, and processes involved in managing affectively committed volunteers and to create an environment in which these challenges can be spoken about more openly **[R4]**. By collaborating with National Trust stakeholders—including the Voluntary and Community Participation Director, Volunteering Community Involvement Consultants, General Managers of properties, Human Resource personnel, and trainers—and supported by funding from the National Trust (GBP10,000) and an ESRC Impact Accelerator Fund award (GBP12,000), Greene and Ward undertook:

1) A critical review of the current National Trust Training offer for volunteer managers, to answer the question: 'To what extent does existing Volunteer Manager training acknowledge and offer support and tools around emotional complexity, working with high affective commitment and emotional labour as a key volunteer leadership and management skill?'.

2) The facilitation of and participation in a workshop with National Trust stakeholders to investigate the redevelopment of existing training materials in line with research findings.

3) The design of a practical toolkit to specifically develop the emotional management skills outlined in the research entitled 'Working with Emotions in Volunteering Toolkit' **[R2]** produced to marketable quality.

4) The pilot testing of the toolkit at five National Trust properties over a six-month period with follow-up questionnaires and interviews with participants **[R4]**.

3. References to the research

R1. Ward, J., and **Greene, A.** (2018). Too Much of a Good Thing? The Emotional Challenges of Managing Affectively Committed Volunteers. *Nonprofit and Voluntary Sector Quarterly*, 47(6), 1155–1177.

R2. Working with Emotions Toolkit 2019 National Trust, University of Leicester.

R3. Ward, J. and Shortt, H. (2018) 'Drawing', In Ann Cunliffe, C. Cassell and G. Grandy (eds.) *Sage Handbook of Qualitative Research Methods for Business and Management*, London: Sage pp262-281.

R4. Conference Paper presented at Voluntary Sector and Volunteering Research Conference September 2019, Aston University, organised by the Voluntary Sector Studies Network (VSSN) and the National Council of Voluntary Organisations (NCVO).

4. Details of the impact

Organisation and sector-wide culture change

University of Leicester research has led organisation and sector-wide culture change in the management of volunteers. This is demonstrated through their acceptance of the necessity for emotions management as a key skill in managing volunteers, and for more effective volunteer-management relationships. Within the National Trust, who manage a voluntary workforce of c. 65,000, this research has led directly to their new acceptance that managing volunteers is challenging and difficult for their paid staff and has been addressed through changes in their training and guidelines **[E1, E2]**. The training (attended by 1,272 managers to date) and guidelines were developed in collaboration with the University of Leicester. The Director of Volunteering and Participation at the National Trust stated **[E2]**:

"The [research] findings were significant in providing an evidence base that enabled my team and I to continue to make the case for, and subsequently secure, the resources we needed to focus on the development of our managers and leaders of volunteers. Research results were successfully used internally to influence peer Directors and senior managers and to support internal funding applications." (Director of Volunteering and Participation at the National Trust).

Moving beyond volunteer management, there is broader recognition of the importance of managing emotions and of engaging volunteer voice in order to facilitate more effective change

processes and more resilient property/site teams in the National Trust **[E2]**. The Head of Volunteering and Participation Development National Trust stated the research:

"*has led to a transformation in our thinking about how we work with and involve volunteers. As a result, significant changes to practice across the national organisation have been implemented including fundamental changes to training and the development of interventions. These changes and interventions demonstrate the transformative nature of the findings of the research on how we involve and work with volunteers.*" (Head of Volunteering and Participation Development National Trust).

Emotions management and the concept of affective commitment is now embedded into how the Trust thinks about the volunteer and volunteer manager relationship, and consequently included in many pieces of guidance and policy **[E8]**, for example: Courageous Conversations (a practical guide for anyone needing to have potentially difficult 'performance' conversations with volunteers), Exploring Everyone Welcome with Volunteers (a practical resource to help plan for and initiate dialogue with volunteers about inclusive practice), Involving Volunteers in National Public Programmes (a guide to support places when planning and delivering key national art and heritage programmes) and a new capability framework for people supporting volunteering at properties.

Covid-19 has had a significant impact on the National Trust and whilst many buildings have closed, many outside spaces have remained open and volunteer management has remained an important aspect of this throughout the pandemic. Although the roll-out of face-to-face training has been hampered, an online People Guidance Pack for Covid-19 **[E8d]** (a regularly updated one stop shop for all people managers, introduced on the 18th March 2020). This guidance was not only informed by the research but developed in collaboration with Greene and Ward.

The research findings have had significant impact in **the wider voluntary sector**, across a variety of organisation types and service provision. This is demonstrated in changes to training, policy and guidelines across organisations who also manage thousands of volunteers. For example, Voluntary Sector Studies Network, Battersea Dogs and Cats Home, and Thames Discovery Programme **[E3, E4, E9]** have all stated publicly how critical this research has been for their volunteer management. These quotes are typical of testimonials from other sector organisations:

"*I've completely changed my volunteer leadership training courses since @ProfAMGreene research highlighted the importance of emotional labour… This study has implications that should be considered by anyone managing volunteers on archaeological projects that are frequently embedded in a specific place or landscape.*" (Senior Community Archaeologist, Thames Discovery Programme) **[E3]**.

"*This has led to a transformation in my thinking about these relationships and some decision making about how to bring in resilience training for many of the volunteer coordinators. At an estimate over 1,000 volunteers and supporters will recognise the need to be aware of the emotions involved in keeping people safe.*" (Head of Volunteering and Fostering, Battersea Communities and Events and Engagement for Battersea Dogs and Cats Home) **[E4]**.

The co-chair of the Voluntary Sector Studies Network states in relation to sector wide workshops developed and delivered by Greene and Ward based on their research that; "*The efforts taken by the research team to translate the findings into clear and practical guidance for practitioners is particularly notable and has helped to ensure that it has a real impact on volunteer management practices*" **[E9]**.

Organisational training and policy: National Trust

University of Leicester research findings have led to significant changes in training and policy concerning the management of volunteers and manager-volunteer relationships within the National Trust (NT).

Training

Findings from the teams' critical review of the NT's Volunteer Management Training modules have led to redevelopment of existing materials with additions and changes around the

emotional challenges of managing volunteers and the need to work with emotions for effective volunteer management **[E6]**. A specific example is the Foundations course (key training for all volunteer managers, within the first 6 months on the job). The course was relaunched in 2018, with input from Greene and Ward's research and 1,272 managers have since completed the training. Feedback indicates the positive effect of the new training: "*I'll be able to work with the volunteers and understand their drives and emotional connection better.*" (Volunteer manager participant, March 2019) **[E2]**. Delegates indicate that the training influenced how they think about managing volunteers, including aspects of recruitment and defining job roles, communications and effective engagement with volunteers **[E2b]**.

Research findings have been specifically used to develop new face-to-face training modules; for example, the three-part course on Working with Volunteers **[E6]**, launched in January 2020 and completed by 35 participants before the Covid-19 lockdown significantly impacted the National Trust. "*I learned about the strong emotional attachments volunteers can have with National Trust properties and how this can be both a positive and negative. Understanding the emotional connections volunteers can have with properties will allow me to help channel their passion in constructive and positive ways for visitor experience.*" (Participant, Part Two, March 2020) **[E2b]**.

Policy

There is a single Project Management Framework in the National Trust, used for all projects to support effective project and programme delivery of national strategy. The Project Management Handbook is the guide which sets out the Framework. The 2019 updated Handbook now includes a need to consider the emotional impact on volunteers and staff as a core element of considerations for managing change **[E1, E7]**.

The Working with Emotions in Volunteering Toolkit has been developed directly from Greene and Ward's research findings and provides managers and volunteers with a novel intervention that includes a set of hard copy and online resources that property teams can use to help their individual and team thinking and practice. The resources can be used for planned training purposes, reflective exercises, or for in-the-moment crisis assistance. This was piloted at five properties from July 2019 to February 2020 with plans to introduce it across the whole organisation in the future. There has been widespread adoption of the learning from the Toolkit across National Trust policies and practice guidance, for example the 2019 practical guide Let's talk: Courageous conversations with Volunteers **[E8]**.

Being more responsive to volunteer voice was one of the recommendations for National Trust policy and practice set out in Greene and Ward's research. As a direct result, volunteers have been directly included in key decision-making processes in a way that they had not been previously, for instance, regarding the development of new organizational Values; Service Principles and Visitor Journey Framework **[E8]**.

"*The research gave me a powerful foundation to argue for parity of volunteer involvement throughout, to create a set of stronger values in the first place that had more meaning for all our people, as well as helping the resulting values to land effectively with volunteers, because volunteers could see that their voice was equally valued. As a result, both staff and volunteers were consulted extensively through focus groups and online engagement. The resulting values were designed for both staff and volunteers, and importantly the accompanying resources featured equal numbers of staff and volunteers too.*" (Head of Volunteering and Participation Development National Trust) **[E2]**.

Impact on improved organisation volunteer manager and wellbeing

The policy changes within the National Trust have led to some measurable improvements in volunteer manager wellbeing. For example, surveys conducted with Toolkit pilot participants indicate improvements in reported confidence in managing volunteers across all measures (ranging from an 8% increase in confidence managing volunteers day to day to a 25% increase in confidence managing volunteers through change) **[E1, R2]**.

Key organization stakeholders also indicate greater access to the voice of volunteers within decision-making leading to improvements in satisfaction and buy-in to change processes: "*The resulting values were designed for both staff and volunteers, and importantly the accompanying*

resources featured equal numbers of staff and volunteers too. Our new Values have been received extremely well by volunteers as well as staff." (Head of Volunteering and Participation Development National Trust) **[E2]**.

5. Sources to corroborate the impact

E1. Testimonial from Volunteering and Participation Director, National Trust (until 2018).

E2(a). Testimonial from Head of Volunteering and Participation Development, National Trust, overseeing c65,000 volunteers across all National Trust properties.

E2(b). Feedback from training developed by UoL.

E3. Testimonial from Community Archaeologist at Thames Discovery.

E4. Testimonial from Head of Volunteering and Fostering, Battersea Communities and Events and Engagement for Battersea Dogs and Cats Home (responsible for volunteer recruitment, induction, reward and recognition activities, learning and development and diversity policy for around 100 volunteers, 18 staff and foster carers).

E5. Document pulling together pre- and post-research Foundations Management Training materials with changes directly related to the research highlighted.

E6. National Trust Project Management Handbook.

E7. National Trust policy documents that include specific references to the research.

   (a) Exploring Everyone Welcome with Volunteers 2019.

   (b) National Public Programmes: Involving Volunteers 2018.

   (c) New capability framework for people supporting volunteering at properties 2020.

   (d) People Guidance Pack for COVID.

   (e) Values; Service Principles.

   (f) Visitor Journey Framework.

   (g) Let's Talk – Courageous Conversations with Volunteers.

E8. Testimonial from co-chair of the Voluntary Sector Studies Network a membership body for those with an interest in voluntary sector and volunteering research, with members spanning academia and the voluntary sector.