# Insider Stories - Exploring Sustainability in Small and Medium Charities


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*I dedicate this thesis to the 22 angels who did not come home on the 22nd May 2017.*

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*You are forever in my heart. When there were times that I wanted to give up, the strength and courage of your families inspired me to continue.*

*LOVE WINS!*

*#WeStandTogether*

# Declaration

This thesis is my own work and has not been submitted in substantially the same form for the award of a higher degree elsewhere.

# Abstract

A body of literature details the strength, depth and endurance of charitable activity in the UK. However, many small and medium sized charities are increasingly required to compete against each other for resources and fight for their survival, particularly those that have relied on national and local government funding. Literature relating to charities has inevitably focused on the vulnerable position charities are in. The present study takes a more positive approach, which draws out knowledge about sustainability and how charities survive despite the challenging environment in which they exist.

The research addresses the following questions:

> *How do charities sustain their operations in the context of the profound social and economic changes, which have occurred in the UK over the last three decades?*
>
> *Are there specific elements of organisational practice which contribute to sustainability, and if so, can this be used to help other charities which are at risk of closing.*

Three charities that have successfully offered services at a local level for over three decades comprised the research site. Each had a different mission, organisational structure and user population. Applying ethnographic and narrative methods over a period of two years, interview and observational data captured the experiences and practices of a range of stakeholders, documentary evidence, use of space and materials (such as buildings and furniture).

The analysis advances third sector research by drawing on three theoretical lenses. First, Organisational Identity Theory provides a framework to analyse differences between the charities under study, with a focus on history, social goals and aims. Second, Resource Mobilisation Theory exposes how resources, such as volunteers, buildings and materials are co-produced and utilised to support sustainability. Third, Social Practice Theory provides an explanatory lens through which to analyse micro-practices and their linkages. This reframes stated social goals through making the teleoaffective structures that drive everyday practices more explicit.

Findings reveal how the social need which each charity aims to address, exists because of a gap in public services and this informs the central and distinctive

features of their identity. A strong and enduring identity is fundamental to sustainability, because it contributes to successful resource acquisition and mobilisation, and underpins and informs practices. Furthermore, a strong identity enables charities to respond, if the need they aim to address diversifies or demand increases. However, the gap that charities fill, and the identity that is valued are rarely made explicit as a recognisable element of social value.

As a way forward, a new framework, which emerged from the research methods adopted, is proposed. It aims to help charities better articulate the social value of their work in a qualitative systematic way that can contribute to their future sustainability. The framework provides for the use of narratives in local evaluations, created in partnership with one of the participating charities from this study.

# Acknowledgements

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To the members of Manchester Survivors Choir, who I had not met at the start of this journey, but I am so glad that you are now my "Bee Family". When my life and view of the world changed forever that dreadful night, meeting you all, singing with you, eating cake and sharing amazing experiences was the light in the darkness. Juggling the choir and writing this thesis has been crazy, but the hours have been worth it, and I hope I can use what I have learned, to evidence what we have achieved and the importance of peer support and companionship after trauma, to help others in the future.

The most important thank you is to my family. To my amazing husband Jon, who has worked so hard to enable me to leave work to further my studies. Thank you for all you do, I love you so much. To my brilliant boys Tommy and Jake, who inspire me every day and have been so patient, when I have been so busy. To my parents, who's incredible parenting still guides me through every new experience. I am so lucky to have you all, thank you.

# List of Abbreviations and Acronyms

NCVO : National Council for Voluntary Organisations

NHS: National Health Service

OIT: Organisational Identity Theory

RMT: Resource Mobilisation Theory

SMO: Social Movement Organisation

SPT: Social Practice Theory

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# Thesis Introduction

## Opening

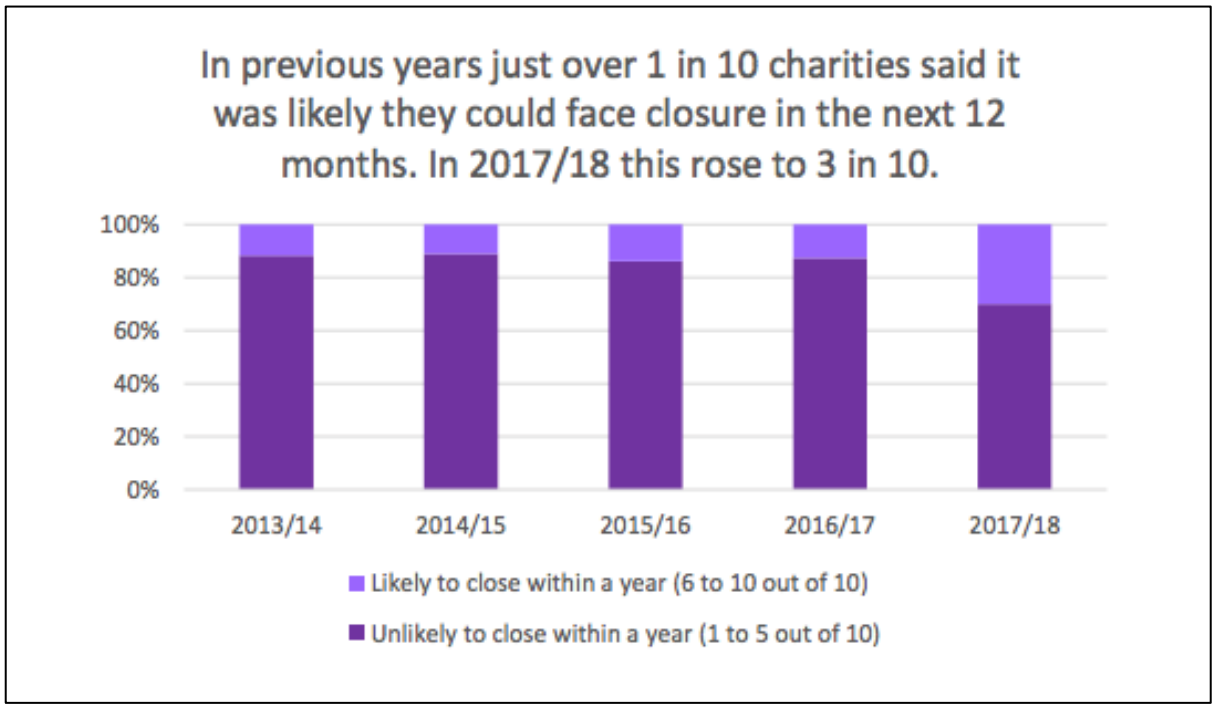
Literature on the history of voluntary and charitable organisations details the strength, depth and endurance of charitable activity in the UK and how over centuries, charities and other third sector organisations, have helped people in need (Alcock, 2016, Hilton, 2012). The history of the third sector also reveals consistent change in the relationship between the sector and the state, and how the sector has had to respond to changes in policy frameworks and the law (Rees, 2014). Since the financial crash in 2008*,* charities faced increased fiscal pressures *(*Breeze and Mohan, 2016*),* which have left many organisations in a precarious position, with some now struggling to survive, let alone thrive (Chad, 2013).

Surveys of charities in the UK have highlighted concerns about long term sustainability*.* A 2018 report by Localgiving, an organisation that supports local charities, found only 47% of the 686 local charities surveyed stated that they were confident that they would be able to survive beyond the next five years. The primary concern of respondents was noted as “generating income and achieving financial sustainability” (Localgiving, 2018:10). Charities reported an increase in competition for grants due to significant cuts in Local Authority spending and feeling they were unable to diversify income streams. They also recognised that challenges with funding are compounded by the fact that many are also coping with a growing demand, due to cuts in public sector services.

The Foundation for Social Improvement (a membership organisation that provides training and advocacy for charities), collected national data from the Charities Commission on over 1000 charities. It found that in 2017/18, three in ten charities thought it likely that they could face closure in the next twelve months, an increase from the previous five years (Figure 1.1). The report similarly highlighted a context of consistently increasing demand for the services of charities, which has happened

over several years, combined with what they describe as a “flatlining of statutory funding” (Foundation for Social Improvement, 2019:6).

**Figure 1.1**




Closure of a charity is one ultimate consequence of a challenging financial climate, but before getting to that drastic, final stage, many charities battle to sustain their services. In a 2017 report by the Charities Aid Foundation, which surveyed 472 Chief Executives of charities, the top five challenges faced by their organisations were:

- *Generating more income/achieving financial sustainability (57 per cent)*
- *Meeting demand for services (36 per cent)*
- *Reduction in public/government funding (34 per cent)*
- *Raising awareness of our charity/cause (24 per cent)*
- *Measuring and demonstrating impact (21 per cent)*

(Charities Aid Foundation, 2017)

These reports highlight the multifaceted nature of the issues that charities cope with and the challenging circumstances in which they exist. The surveys provide a practice perspective of the issue and details the challenges as identified by those working for a charity.

Academics have also recognised and discussed the impact of the 'radical upheaval' experienced by charities, due to the crisis in the financial system and the challenging political and social environment this created (Macmillan et al, 2013:3, Alcock, 2012). Public debt, deficits in public and private spending and static economic growth, inevitably has an impact on most charities and this has been compounded by reforms to welfare, which were introduced in response to these fiscal pressures (Macmillan, 2013). The reforms meant there was a greater demand for welfare services, because people were unable to access help from statutory services and therefore were turning to charities for support (Clifford et al. 2013). This created what some third sector commentators (Cooney, 2019, Plummer, 2019) describe as the "perfect storm" of increased need, coupled with reduced public spending.

This could create a rather bleak picture, especially for small to medium sized charities who often operate at a local level, prompting concern for the future sustainability of the charitable sector (Radojev, 2015). However, many charities *do* manage to sustain their operations and survive. Indeed, small to medium charities continue to play a very important role in civil society. They have been described as the "life blood" of the third sector because of their capacity to offer innovative services and their ability to position themselves and develop strong links in local communities and support marginalised people in need (Select Committee on Charities, 2017). Without undermining the valid issues raised in surveys of practice and the academic literature, it is also important to recognise (and as will be discussed further in Chapter Two), that not all charities are the same. Some charities are less affected by the exogenous factors described above (Terry, 2017), especially those who do not rely on state funding. This prompts the question, what are the endogenous factors which enable some charities to weather this "perfect storm"? And how and why do some charities effectively sustain their services, despite the challenging political and economic environment in which they exist.

**Research Focus and Aims**

The focus of this thesis is charities which have survived, and continue to do so. Previous literature has identified that small and medium sized charities are more likely to struggle in a challenging financial climate compared to large charities,

because they are unable to compete in commissioning processes or bid for services at scale (Rees, 2014). In response, I have studied three charities which fit to these size categories. I draw on the definitions of charity size as detailed by the National Council for Charity Organisations (NCVO) in their 2019 UK Civil Society Almanac (see figure 1.2). The three charities all comply with the small or medium categories, with a defining feature which unites them being that they have an income of under one million pounds.

Fig 1.2

| Income | Definition |
|---|---|
| Less than £10,000 | Micro |
| £10,000 to £100,000 | Small |
| £100,000 to £1 million | Medium |
| £1 million to £10 million | Large |
| £10 million to £100 million | Major |
| More than £100 million | Super-major |

(NCVO, 2019)

The three charities recruited for this study were:

Citizens Advice
Home-Start
CancerCare

A detailed description of the three organisations is provided in Chapter Six.

To develop a deeper understanding of sustainability, choosing to focus on three organisations provides an opportunity to gain a richer understanding of a range of aspects relating to operational functioning. Rather than focusing on a specific element, such as fundraising, across a large sample of charities, the present research study takes a deeper, case-oriented analysis of the focal organisations (Sandelowski, 1995), to enable the identification of different endogenous factors which contribute to sustainability, or what I go on to describe as the survival dynamics (See Chapter Ten).

By studying these three charities, this research seeks to answer the following questions;

> *How do charities sustain their operations in the context of the profound social and economic changes, which have occurred in the UK over the last three decades?*
>
> *Are there specific elements of organisational practice which contribute to sustainability, and if so, can this be used to help other charities which are at risk of closing?*

To answer the research questions, this thesis will provide an in-depth sociological analysis of the three charities, which operate at a local level and have successfully offered services for over three decades. Literature relating to charities and the environment in which they exist has often (though not exclusively), focused on the vulnerable position charities are in, as illustrated in the reports cited in the previous section, and evident in third sector academic research (Greenlee and Trussel, 2000; Andres-Alonso et al, 2016). This research takes a more positive approach, which draws on knowledge about sustainability and focuses on organisational factors and activity. Capturing and analysing the voices of those connected to the three charities, it will identify and analyse the features of each organisation as narrated by those who know them best.

**Research Methodology**

The empirical focus of the research is upon the stories of those who connect with the three charities and encompasses a broad range of experiences, from those working for the charity, to those volunteering, or people who have connected with them for help and support. A narrative based methodology is adopted through which to explore people's experiences of being involved with a particular charity and how they articulate information about that charity through their storied accounts. For example, I was interested to discover if and how people refer to the organisation's identity and whether it features in the stories they tell about their experiences there. As Riessman notes, individuals and groups 'construct identities through storytelling' and I was interested to discover the connection between organisational identity and

sustainability (2008:8). Furthermore, although narratives are spoken at a particular time, stories can relay past and present experiences and future imagined experiences (Andrews, 2014), which are useful when considering sustainability over time.

Adopting a thematic approach to analysis, it focuses on the content of the words of those narrating their stories. It gives voice to participants personal experiences of engaging with their charity, providing both current and retrospective accounts across engagement and highlighting elements of experiences that are perceived as significant and meaningful. This methodological decision facilitates the emergence of key themes from within the stories, which subsequently provides a basis for further analysis and ensuing empirical and theoretical discussion. By employing this particular narrative analysis approach, I hope this research will contribute to the development of further uses of narratives within third sector research.

**Theory**

Focusing on the narratives which are told about the three charities created an opportunity for richly textured and multifaceted data and knowledge creation, it also posed theoretical challenges, particularly in relation to choosing an appropriate and useful theoretical lens. Led by my research questions and a desire to use a novel approach to theorising the third sector, the research explores the sustainability of the charities through three different theoretical lenses; Organisational Identity Theory (OIT), Resource Mobilisation Theory (RMT) and Social Practice Theory (SPT). The reasons for selecting these three theoretical frameworks are detailed in Chapter Three. However, what is useful to convey before going into greater detail within the chapters of this thesis, is that these lenses provide what Corry (2010) describes as a processual approach to theorising the third sector. Thus, my approach considers the charities as a social process, which enables me to use the data to gain an insight into, not only how these charities operate now, but their life cycle, how they have evolved, how their identity, mission and aims enable them to acquire resources, and how each of these combine, to inform their practice.

**Research Interest and Motivation**

Recognising my professional background as a social worker is useful to contextualise this research, my motivation to engage in this study and my position as researcher. Returning to academia from practice and being based within a social work team at the University, means that I bring a particular, and arguably different, perspective to third sector research. My experience of working for a Local Authority in a role where it was my duty to help marginalised people in need, meant that I interacted with different types of organisations who shared a similar aim. I regularly worked in partnership with charities. Often this involved trying to find solutions to issues people on my caseload were experiencing, and these would be issues that the Local Authority did not have the resources or expertise to deal with. For example, providing food parcels for people in economic crisis, or people seeking the safety of a refuge to escape abuse. I was experiencing how cuts to public services meant a greater demand being placed on charities to meet the social needs of communities, first hand.

I interacted with some charities which I perceived to be excellent, many of which offered a service that I would have loved to have provided in my social work role, but time and remit boundaries in my professional capacity, prevented me from doing so. For example, I observed that charities spent more time providing one to one support and developing more bespoke services for those who came to them for help. Despite this, unfortunately I was also aware that charities would come and go. I experienced how a charity seemed well established in a community and had offered a service to a Local Authority service user, but six months later when a similar issue arose, perhaps with a different person, I would discover that the charity had folded. I recall thinking how unsettling and difficult it must be to choose a career working for a charity and how sad it was that expertise was lost.

It prompted an interest in why some charities survive and why some fail and what were the features of the organisations that contribute to their sustainability. I was interested to discover whether it related to their organisational mission, or their identity which I observed to be distinct from public services, or was it the practices I had observed, which were more relationship based? Perhaps it was simply based on

resources and which charities could sustain funding? My practice background and interest in how charities work in practice has guided some of my methodological and theoretical decisions and has informed the format of this thesis, which has a greater focus on the empirical chapters.

**Contribution to Academic Knowledge**

The thesis makes an empirical and theoretical contribution to knowledge by developing a concept, which I describe as the survival dynamics of charities. It will add to the existing literature which explores how charities respond to changes in the political and social environment, by using the stories of those who connect to the charities, to study sustainability. Rather than focusing on why some charities struggle or fail, it will explore sustainability and focus on endogenous features which contribute to survival. To achieve this, I take an approach to theory which is novel within third sector research, because it draws on three different theoretical lenses to analyse the data, one of which is Social Practice Theory, which has not been used previously to study charities and the dispersed and integrated practices associated with them. It is hoped that this could lead to further studies which focus on practices, to better enable charities to evidence the contribution they make to society, and improve public understanding and support.

**Practical Relevance**

It is intended that the contribution of this research reaches beyond the academic community, to be of practical relevance in informing the practice of small and medium charities, particularly in relation to how they evidence their social value and articulate the contribution they make to society. In response to a discussion with employees from one of the charities in this study, I have developed a simple evidence framework to help them generate and present evidence about their social value. It was inspired by the use of narrative methods in this study and will enable charities to capture and analyse the stories people tell about how they have been helped, to be used as evidence in reports or to inform training. Focusing on the need a charity hopes to address, the interventions they offer and the practices they engage in, it will document the layers of support which a charity provides and how this translates into social value.

**Thesis Structure**

The thesis follows a traditional layout consisted of an introduction (Chapter One), a chapter which explores the political environment in which charities exist and introduces current literature (Chapter Two), a chapter which focuses on theory (Chapter Three), an exploration of the literature relating to the use of narratives in research (Chapter Four), methodology chapter (Chapter Five), setting the scene chapter (Chapter Six) and presentation of the empirical findings (Chapters Seven - Nine) before concluding with recommendations for practice (Chapter Ten).

**Chapter One – Introduction.**

**Chapter Two** – **Understanding the Context** – This chapter details the definition of charities, as set in statute. Then, drawing on third sector research literature, it discusses the issue of defining the third sector. Following that, it sets the scene for the research, by discussing the challenging economic and political environment that charities must navigate and provides a historical narrative of the relationship between charities and governments over the last three decades. This includes commissioning and the potential impact it has on small and medium size charities, the Public Services (Social Value) Act and the imperative this puts on charities to evidence the social value they make and how this could affect sustainability.

**Chapter Three - Theorising Charities: Adopting Three Lenses –** This focuses on theory and documents the decisions I made when choosing the three theoretical lenses employed in this study. Drawing on literature which discusses theory in third sector research, I discuss the different elements of the charities I hoped to explore and which theories I chose to do this. It therefore introduces Organisational Identity Theory, Resource Mobilisation Theory and Social Practice Theory.

**Chapter Four** – **The story of stories** - Focuses on the use of narratives in social research and drawing on academic literature, details its relevance to this study.

**Chapter Five – Methodological Process** - Outlines the methodology, including details on the research setting, the participants, the data and the analysis.

**Chapter Six** - **Setting the Scene** – This chapter provides a descriptive overview of the three charities in this study and explores their identity using Organisational Identity Theory, to detail the central, distinct and enduring features of each charity. It discusses their founding principles, their aims as currently articulated, the services they provide, and their relationship to public sector services.

**Chapter Seven - An Exploration of Organisational Space and Money –** This chapter uses Resource Mobilisation Theory to analyse and explore how the charities access and mobilise their material resources. Focusing on their buildings as a resource first, it will discuss the conceived, perceived and lived elements of their spaces, then it will explore money as a resource, and fundraising strategies.

**Chapter Eight** - **The People** – This chapter focuses on each charity's human resource and specifically their volunteers. It presents data on how the charities access volunteers and narrative extracts from volunteers and employees about the role volunteers take within the organisation. It puts forward and elaborates in more detail that self-help/mutual aid is a form of human resource mobilisation.

**Chapter Nine – The Practices** – This chapter uses Social Practice Theory as a lens to explore the practices which research participants describe in their narratives. It focuses on three specific bundles of practices which relate to the three charities; family support, peer support and giving advice.

**Chapter Ten – Conclusion and Framework for Practice –** The final chapter provides a summary of the findings from this research and consolidates the concept of a survival dynamic. It introduces an evaluation framework, that I hope will be of use to charities who seek richer ways to evidence their social value.

# Chapter Two - Understanding the Context

## Introduction

This chapter sets the scene for the research by providing a summary of the existing literature, which explores the role of charities in the UK and the challenging social and economic environment in which they exist. Initially it will focus on how the term charity is defined in law and how it is regulated in practice. Defining the term is useful when trying to understand how the three organisations I am studying position themselves in relation to others, to gain a greater understanding of their conceptualisation of social activity and to understand the historical context in which their defining label has emerged (Hilton, 2012). Then, drawing predominantly on third sector research literature, it will explore the complex issue of defining the third sector, to understand and contextualise how charities are positioned in relation to different types of organisations. I proceed to discuss the relationship between charities and society, specifically their relationship with governments over the last thirty years, focusing on the impact of ideological perspectives on policy and funding. This will include a critical exploration of commissioning as a process adopted by government agencies to plan, purchase and monitor welfare projects. Finally, I review the Public Services (Social Value) Act 2012, which was introduced to inform the commissioning process, and the impact this has had on charities, in relation to how they evidence their social value.

## Definitions

Over centuries, people have endeavoured to help each other and thankfully this is an enduring feature of social life (Hilton, 2012). What has been less consistent is how this phenomena is understood, analysed, regulated, or classified (Alcock, 2016). This is exemplified in the number of different terms used to describe the organisations that engage in this form of collective action, including: charities, voluntary organisations, Non-Governmental Organisations and also the collective term for these organisations, such as Third Sector or Civil Society. In some contexts, defining different terms for organisations could be deemed unnecessary, because there is a general understanding that these organisations are established to help people. However, within academic research and the development of policy, definition

is useful when delineating key concepts under enquiry (Alcock, 2010). The next section of this chapter will focus on the definition of the two terms used in this thesis; charity and third sector.

## Charity

Charity is a term defined by law, most recently updated in the 2006 Charities Act. Previously, the definition related back to the pre-amble of a seventeenth century law, which amounts to a description of 'relief' or contribution types and a list of causes (see Figure 2.1).

**Figure 2.1**

Preamble to the Elizabeth Statute of Charitable Uses, 1601

'Whereas Lands, tenements, Rents, Annuities, Profits, Hereditaments, Good, Chattels, Money and Stocks of Money have been heretofore given, limited, appointed and assigned as well by the Queen's most Excellent Majesty, and Her most noble Progenitors, as by sundry other well disposed Persons, for some relief of aged, impotent and poor People; some for the Maintenance of sick and Maimed soldiers and Mariners, Schools of Learning, free schools and Scholars in Universities, some for the Repair of Bridges, Ports, Havens, Causeways, Churches, Sea-Banks, and Highways; some for the Education and Preferment of orphans; some for Marriages of Poor Maids; some for Supportation, Aid and Help of young Tradesmen, Handicraftsmen, and Persons decayed, and others for Relief or Redemption of Prisoners or Captives; and for Aid of Ease of any poor Inhabitants concerning payment of Fifteens, setting out of Soldiers or other Taxes…'

*Report of the Committee on the Law and Practice Relating to Charitable Trusts, CMD. 8710 (cited in Hilton, 2012:2)*

In the nineteenth century the law this related to was repealed, but the pre-amble was retained and summarised into four 'Heads of Charity', which were;

- Trusts for the relief of poverty
- Trusts for the advancement of education
- Trusts for the advancement of religion
- Trusts for other purposes beneficial to the community, those not falling under any of the previous heads (Hilton, 2012)

The 2006 change to the law stated that for a charity to qualify as such, there should be two elements to their work. Firstly, the organisation must have a charitable purpose which is recognised under charity law (see Figure 2.2) and secondly, the charity's activities must be for the benefit of the general public or a sufficiently wide section of it (Brodie, 2010).

**Figure 2.2**

**Descriptions of purposes**

(1) A purpose falls within this subsection if it falls within any of the following descriptions of purposes—

(a) the prevention or relief of poverty;

(b) the advancement of education;

(c) the advancement of religion;

(d) the advancement of health or the saving of lives;

(e) the advancement of citizenship or community development;

(f) the advancement of the arts, culture, heritage or science;

(g) the advancement of amateur sport;

(h) the advancement of human rights, conflict resolution or reconciliation or the promotion of religious or racial harmony or equality and diversity;

(i) the advancement of environmental protection or improvement;

(j) the relief of those in need because of youth, age, ill-health, disability, financial hardship or other disadvantage;

(k) the advancement of animal welfare;

(l) the promotion of the efficiency of the armed forces of the Crown or of the efficiency of the police, fire and rescue services or ambulance services;

(m) any other purposes—

(i) that are not within paragraphs (a) to (l) but are recognised as charitable purposes by virtue of section 5 (recreational and similar trusts, etc.) or under the old law,

(ii) that may reasonably be regarded as analogous to, or within the spirit of, any purposes falling within any of paragraphs (a) to (l) or sub-paragraph (i), or

(iii) that may reasonably be regarded as analogous to, or within the spirit of, any purposes which have been recognised, under the law relating to charities in England and Wales, as falling within sub-paragraph (ii) or this sub-paragraph.

The Charity Commission has responsibility for regulating charities in England and Wales and decisions about whether an organisation meets the criteria for becoming a registered charity. They also have a remit to investigate any allegations of abuse, have the power to enquire into the affairs of charities and offer advice and guidance, particularly to trustees (Hilton, 2012). The Commission was established as an independent body, which is not subject to the direction or control of Government. As the National Council for Voluntary Organisations (2015) notes, independence from party politics is essential because the Charity Commission regulates a sector which is characterised by party political neutrality (NCVO, 2015). If it were perceived by the

general public to be political, it could undermine perceptions of charities, with most charities not wanting to be associated with a particular political party. It has been argued (Brodie 2010, NCVO, 2015) that the Commission has become politicised and that they have become a means by which to implement government policies. This is because the decision on who governs the commission is made by the government in office, which could mean they are not sufficiently accountable and perceived to be politically biased to the people who have put them in post.

**Third Sector**

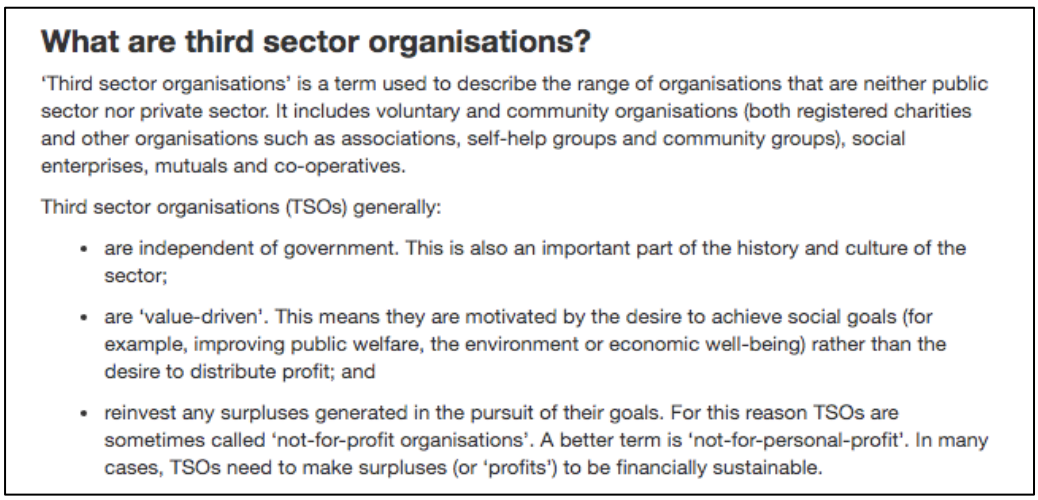
Unlike the term charity, which is defined in law, defining the third sector is more challenging and has been consistently debated in academic literature, policy and practice for many years (Alcock, 2010). Academic literature on definitions and concepts pre-dates the current notion of a third sector. Formally the focus was on the 'voluntary sector' or the 'voluntary and community sector', however as Alcock (2010) recognises, principles informing the need to define a distinct sector have endured and those early discussions are still relevant. In 2002, Halfpenny and Reid posed the question, 'what organisations compose the sector?' (2005:533) and then offered different definitions and perspectives from a range of sources. They concluded that the sector was extremely diverse, and that imposing homogeneity is questionable, because it could exclude some dimensions of the sector which could be potentially significant.

Taking a similar argument in relation to the diversity of the sector, Macmillan argues that defining the third sector is complex, because it is problematic to identify conceptually which elements hold these organisations together. The diverse range of activities and organisations which could be defined as being part of a third sector make it difficult to establish any 'internal coherence' (2012:6). He also notes that in classical categorisation, or for a strong definition to exist, the contrast between what falls in the boundary of what something is and what it is not is essential, and the sharper those differences are the stronger the definition is. The diverse range of organisations and groups which could fall in those boundaries, makes this problematic.

Grotz (2009) also questioned the notion of a homogeneous third sector and the idea that there is unity amongst organisations. He did identify that many commentators proposed a negative notion of the sector, by describing what it is not. For example, *non*-governmental and *non*-statutory, or *non*-profit. In relation to this, Alcock (2010) notes that the term non-profit sector is more commonly used in the US literature because of their primary concern in differentiating them from the profit-making organisations of the market. Whereas in European literature, where the relationship between voluntary organisations and the state is more developed, the notion of a non-statutory sector is more prevalent. Negative definitions describe what the sector is *not*, there remains the issue of what it *is*. Alcock (2010) notes how the negative categorisations are exogenous, drawing on definitions of other sectors, or other social and legal forms. He recognises that this belies the usefulness of an alternative approach, which is endogenous and would seek to identify the core elements of the sector. Alcock (2010) argues that a combination of the two would be useful and appropriate, to ensure a rounded theoretical understanding of the sector.

The National Audit Office, in their guide titled, *Successful Commisioning Toolkit* (2019), which is aimed at Local Authorities and local National Health Service (NHS) bodies, describes third sector organisations. It summarises what unites the organisations in this sector, which are that they are independent of government. That they are value driven, which means they are motivated by a desire to achieve social goals, rather than profit, and that they reinvest surplus money which may be generated, in the pursuit of those goals. See Figure 2.3

**Figure 2.3**



**What are third sector organisations?**

'Third sector organisations' is a term used to describe the range of organisations that are neither public sector nor private sector. It includes voluntary and community organisations (both registered charities and other organisations such as associations, self-help groups and community groups), social enterprises, mutuals and co-operatives.

Third sector organisations (TSOs) generally:

- are independent of government. This is also an important part of the history and culture of the sector;
- are 'value-driven'. This means they are motivated by the desire to achieve social goals (for example, improving public welfare, the environment or economic well-being) rather than the desire to distribute profit; and
- reinvest any surpluses generated in the pursuit of their goals. For this reason TSOs are sometimes called 'not-for-profit organisations'. A better term is 'not-for-personal-profit'. In many cases, TSOs need to make surpluses (or 'profits') to be financially sustainable.

As this definition shows, values and being value driven is often deemed to be a defining feature of the third sector (Blake et al, 2006), that despite the diverse individual aims and purposes of separate organisations, they are 'united in their commitment to the value and belief in collective action' (Jochum and Pratten, 2009:3). However, identifying and defining what those shared values are is challenging. Jochum and Pratten (2008) recognise that there are recurring themes in literature relating to the third sector and values, such as a commitment to social justice, to empowering people and providing a holistic approach to people's needs, but it is not clear how organisations put these into practice. Therefore, this raises the question of whether being value driven really does unite the sector.

Evers and Laville (2004) in their review of the third sector, acknowledge that the definitions of the sector are underpinned and relate to the political and cultural contexts in which it is being explored; that definitions are produced in the context of changing historical dynamics and political and cultural change. In an article following that of Evers and Laville, Paton (2009:1) develops this recognition of the influence of historical change and proposes what he describes as a 'sedimentary theory' of the sector. He uses the analogy of layers of sediment accumulating to become something solid and durable, to changes in values and activities that have occurred in the sector, which when they layer over time, become an identifiable whole.

**The Political Context**

Political contexts influence definition, but also policy and practice. The next section of this chapter focuses on the relationship between charities and governments and how charities, as part of the wider third sector, are politically positioned in society. To take Paton's (2009) analogy, the following discussion will describe the layers of sediment, as they have settled over the last three decades on the political landscape. It will detail how charities have had to respond to changes in political ideologies, which is relevant to understanding the context in which the charities in the present study have survived.

There has been an unprecedented growth in charitable organisations in the UK over the last three decades (Polonsky and Grau 2008, Hopkins, 2010 and Wood and Leighton, 2010), with charities increasingly working alongside both commercial and

state organisations, in what has been described as a move towards a plurality in public services (Wood and Leighton, 2010). The third sector's role in delivering what would have previously been public services has grown rapidly, both in terms of the scale and also the scope of services offered (Dickinson et al, 2012). This increased input has been central to the discussions and debates around the reform and restructuring of public services in the UK over the last 30 years (Macmillan, 2010). Those working for charities acknowledge that whilst this has led to opportunities being created for their organisations to compete to deliver a wider range of services, some are also of the opinion that this has come 'at a price' (Alcock, 2012). This widening of public service provision has inevitably resulted in increased political interest and greater governmental scrutiny of charities, which in turn has meant that many organisations have felt drawn into a culture of target setting, greater self-evaluation and have felt the need to respond to evidence- based policy making, which is more characteristic of the public sector (Breckell et al, 2011). Third sector organisations are compelled to change the way they operate, most notably with them having to adopt a more business-like and managerial approach, which challenges the operational foundations of some in the sector (Supulveda et al, 2011). Fears have been expressed that this could lead to an erosion of the sector's 'autonomy' and distinctive characteristics (Macmillan, 2010). Further, it is proposed that this move legitimises the introduction of managerial cultures and an entrepreneurial ethos and approach (Milbourne and Cushman, 2013).

In addition to these concerns, this rapid growth has been set against a backdrop of imposed austerity measures from government and significantly reduced public spending, which has meant that third sector organisations are dealing with considerable financial constraint and a reduction in resources (Gibbon and Dey, 2011). The following statistics illustrate the significant cuts that the third sector in the UK endured. In 2013, it was estimated that third sector organisations will lose approximately £911 million in government funding per year by 2015/16 and that the cumulative reduction in resources over the period from 2011 – 2016 would be £2.8 billion (Kane and Allen, 2011). Therefore, whilst in policy and governmental rhetoric, charities and other third sector organisations were seemingly being offered increased resources and actively encouraged to join the mixed market of welfare, this was undermined by the realities of reduced government funding and a

retrenchment of national funding to Local Authorities. This has fuelled competition between charities, where previously there has been a greater focus on co-operation between organisations and a collaborative ethos within the field (Lyon, 2013; Williams, 2008). An upsurge in competitive culture has consequently led to an increase in pressure for charities to demonstrate and justify their worth, to evidence the impact of their work and how they 'outperform' compared to other, similar organisations (Rickey et al, 2011). Inevitably, this has led to some organisation finding themselves unable to survive these financial pressures.

The impact of political change and the economic downturn has especially affected smaller charities (particularly those who specialise in human welfare) and for some has led to them ceasing to operate (Kendall et al, 2018). This has prompted exploration by third sector researchers (Chapman, 2017, Clifford, 2017 and Mohan et al, 2018) as to why this is the case and to ascertain if financial strength is a "proxy for success" (Chapman 2017:3). Their research also could provide evidence to inform where and how funders and policy makers should direct their resources to overcome this issue for a particular section of the third sector (Mohan et al, 2018). In addition, some wanted to understand whether the reasons that some organisations were ceasing to exit, was due to any additional reasons, or was it purely related to financial pressures (Chapman, 2017). Whilst their research suggests that shortfalls in funding are consistent with the financial position of struggling voluntary organisations, the research also recognises how organisational characteristics and the context in which they operate can also form part of the story behind why they have stopped operating. Other examples provided were shortcomings in finding volunteers to deliver key services, or as Chapman (2017) discusses, issues relating to governance and focuses on the relationship between governance and organisational sustainability and success. This highlight the undeniable link between political and financial instability and small charity survival, but also the additional factors, as this thesis will also explore in further detail.

**New Public Management**

Over the last three decades the governments of many western countries, including the UK, have recognised and chosen to harness the expertise of charities within their

welfare provision (Hogg and Baines, 2011). Prior to this, charities were more on the periphery of social policy decisions in the UK and state support was on an ‘ad hoc’ basis (Alcock, 2009; Hodgson, 2004). During the 1980’s, the Conservative government in the UK pursued a neo-liberal strategy, with an aim to marketise social welfare and publicly owned assets to develop an enterprise culture, encouraging individuals to operate within and embrace a market oriented society. The aim was to re-invigorate civil society, regenerate the economy and to restructure the state (Jessop, 1994).

Policies and practices known as New Public Management were introduced. The rationale for this was to improve public services, with Conservatives accusing the public sector of being too rigid, having an over reliance on bureaucratic processes and deeming them to be expensive and inefficient (Pierre and Peters, 2000). Furthermore, they made comparisons to the private sector suggesting that the public sector lacked the rigour and discipline which characterises private companies. Their introduction of market mechanisms into welfare was founded on a belief that capitalist enterprises are more efficient, economical and effective in providing services (Harris, 2003). The assumption was that by adding an element of competition, services will be more efficient because prices will decrease, and quality will increase, as service providers fight for contracts. This negativity towards public services paved the way for a ‘rolling back’ of the state and led to the government turning to charities and other third sector organisations to compete for health and welfare provision and encouraged them to adopt business like approaches (Hogg and Baines, 2011). At that time, this was particularly evident in adult social care and specifically in care homes for the elderly.

Increasingly, charities were moved to a more central role within welfare provision and became positioned as key players in this field. It is argued that this was because governments, across the different parties, increasingly recognised that charities were able to provide diverse and responsive services, particularly to those who are socially excluded in society, but also because ‘they offer opportunities for generating trust, civic virtue and social capital’, being embedded in community and public life (Kendall and Knapp, 2000: 1). This direct link to communities was recognised as a key strength of charities, with their positioning enabling them to gain specialist

knowledge of their service user or clients' needs, independent from existing public services. This perceived independence from the state enabled them to reach groups which the government had historically struggled to engage with. It appeared they were able to offer more flexible services, not bound by institutional pressures and perhaps most importantly, they could suggest and deliver more innovative solutions to community issues (Murray, et al, 2010).

**The Third Way**

It was the Conservative administration that instigated the neo liberal approach to welfare in the 1980s, however, the increase in the political and economic profile of the third sector has mostly been attributed to the New Labour government (Rees et al, 2013). Their election in 1997 was generally greeted as a positive shift for many working in the third sector, with optimism that the new government's agenda would be in greater alignment with the values and aspirations of the sector (Bunyan and Ord, 2012). Subsequently, New Labour expanded their support for the third sector both in policy and on a financial basis whilst in office from 1997 - 2010 (Alcock, 2012). With an attempt to move away from what they considered to be old, class-based divisions of left and right politics, they (along with President Clinton in the USA), embraced Anthony Giddens' 'Third Way' (1998) concept and championed this new political ideology (Mellbye, 2003).

This period saw a rejection of corporatism and a greater emphasis on modernisation of welfare and the introduction of communitarian policies. New Labour believed that economic success could be achieved, and the issue of social exclusion could be tackled, by strengthening social capital (Chapman, et al 2008). It became clear that third sector organisations were key to this political stance. Some argued that it was not entirely new and that some of the third way's key elements, for example, the importance of encouraging work and the recognition of and engagement with civil society, had 'historical roots in the New Poor Law and in the writings of New Liberals such as Beveridge' (Powell, 2000:57). However, New Labour championed this as a new political ideology and it was recognised that it did enhance the potential for a greater, pro-active role for charities; it enabled organisations to position themselves as a 'third force alongside the state and the market' (Alcock, 2016:100).

As part of New Labour's commitment to this Third Way ideology, their interest and desire to draw on the expertise of the third sector, was publicly acknowledged when, within the cabinet office, they created the Office of the Third Sector for England and for the first time appointed a Minister of the Third Sector (Hogg and Baines, 2011). The intention of this new office was to help the sector to campaign for change, promote the development of social enterprises to strengthen communities and, critically, to enable and support third sector organisations to deliver public services The Office also initiated The National Programme for Third Sector Commissioning, which aimed to recognise, understand and harness the potential of the third sector, particularly in relation to organisations being included not only in the delivery of public services, but to be seen as "partners" to be involved in designing and improving those services (Hogg and Baines, 2011).

The discourse around partnership and the greater role for the third sector in communities was clearly defined in the state-voluntary sector Compact, which was introduced by New Labour (Rees et al, 2013). As the then Prime Minister wrote;

> *'This Compact between Government and the voluntary and community sector provides a framework which will help guide our relationship at every level. It recognises that Government and the sector fulfil complementary roles in the development and delivery of public policy and services, and that Government has a role in promoting voluntary and community activity in all areas of our national life* (Home Office, 1998:4).

He also talked about the Compact (of which there was a national one, but also smaller, bespoke Compacts between Local Authorities and their local organisations), being both an important document for practice, but about its importance as a symbolic document for an ideological shift. This political era saw the discourse in relation to charities centre around a new language that included concepts such as 'citizenship, 'community' and the promotion of an 'inclusive society'.

It is argued that New Labour's bold stance on the development of the sector and the increased resources they allocated to it was positive. However, they appeared 'timid' and cautious when it came to trusting organisations to use the additional funding

wisely and effectively (Milbourne and Cushman, 2013:3). In turn, this led to the development of greater scrutiny of the sector via increased evaluation and measurement processes being introduced. They appeared to simultaneously endorse the positive contribution charities and other organisations could make to welfare in the UK, whilst also questioning their ability to a certain extent, and not fully trusting the sector to take on this role. The issue of power and trust between the state and third sector became particularly apparent at this time.

**The Coalition Government and the Big Society Agenda**

When the Coalition government were formed in May 2010 they inherited what has been described as 'a significant and challenging policy legacy' (Alcock, 2012:3), and once again the sector became particularly thrust into the political spotlight when David Cameron launched his 'Big Society' agenda. A key element of this concept was to 'open up public services' even further and enable charities to compete to deliver more services, which had previously been offered as public services (Woodhouse, 2013:1). This quote from "Build the Big Society" section of the Conservative Party Manifesto of 2010, details how the concept was also about reducing the state and mirrors the neo liberal policies from the Conservative administration of the 1980s;

> *'Our alternative to big government is the Big Society: a society with much higher levels of personal, professional, civic and corporate responsibility; a society where people come together to solve problems and improve life for themselves and their communities; a society where the leading force for progress is social responsibility, not state control* (Woodhouse, 2015:5).

In an attempt to distance themselves from what they described as 'big state' politics of the Labour party and also free state neo liberalism (which at the time was being unfavourably linked to the recession in 2008), the Conservatives, in coalition with the Liberal Democrat party, were claiming that their programme of reforms, provided an opportunity for the voluntary and community sector. As Alcock (2016) argues however, there were many ideological similarities between the Big Society agenda and New Labour's Third Way discourse, with a mixed economy of welfare being promoted and the third sector being expected to operate somewhere between the

state and the market. Also, as Bunyan and Ord (2012:121) suggest, it was not in fact a move away from neo liberal principles, but rather that the same ‘neo liberal thread’ connected the New Labour era with the Big Society agenda.

This proposed dispersal of power from central government to local organisations and institutions was described as an agenda of localism, which was about devolving power downwards to a local level (Clayton et al, 2015). One of the aims of the Big Society proposal was to actively encourage decisions, particularly on health and welfare, to be made at a local level, to inspire community action and to empower citizens to take a greater role in the development of their communities. Whilst the rhetoric on this could be perceived as a positive move for charities, many third sector organisations were already engaged in community development, but they were only able to achieve this because of Local Authority funding, which in turn relied on funding from central government.

Underpinning this political agenda was a discourse aimed at criticising the previous Labour government and what the Coalition described as Labour’s over bureaucratic welfare system, which they suggested “privileged” those who claimed benefits, over those described as “hard-working families” (McKee, 2015). They identified specific social problems and issues, such as drug abuse, family breakdown, poor public spaces, chaotic home environments and high crime. It was suggested that these issues could not be dealt with effectively with state intervention, but required community action, which could be led by charities. Social problems were further blamed on what was perceived to be people’s over dependence on welfare and the phrase “broken Britain’ was introduced to describe the state of British society. This was the return to discourses which introduced phrases such as “dependency culture” and “benefits scroungers”. Thus, as authors have noted, there were two dimensions to the Big Society agenda; a promotion of localism, underpinned by a problematisation of state welfare and its recipients (McKee, 2015 and Bunyan and Ord, 2012).

A review of the literature, both academic texts and also blogs and articles from those connected to the third sector, detailed that at the time there was a lot of debate and discussion within the third sector about this political agenda and how it would affect

their work (Morris, 2012, Evans, 2011 and Kisby, 2010). Responding proactively, some organisations such as the National Council for Voluntary Organisations (NCVO), appeared to take on the challenge by working with the government to identify the issues to be targeted. Other high-profile charities used this political era to move closer to government as a means to secure large amounts of funding. However more generally, the third sector were concerned that this so called positive move for charities, was in fact a smokescreen for the progression of political ideologies which were introduced in the 1980s (Kisby, 2010). Despite all the positive rhetoric about the value of the third sector and their innovative interventions in communities, it was suggested that this was undermined by considerable cuts to Local Authority funding and once again framing social issues as individuals' failings, rather than recognising and dealing with the structural issues that underpin social injustice (McKee, 2015).

Furthermore, the third sector were concerned that this agenda was built, and relied on, a misconception that they had previously been 'crowded out' by public services, when indeed many organisations were core funded by Local Authorities and some of their success was from working in partnership with publicly funded services (Alcock, 2012). Indeed, this time saw a decline in third sector income because, due to changes in legislation in relation to commissioning, smaller, grassroots organisations were unable to compete for large contracts with bigger private sector companies and at the same time, were losing their core funding from Local Authorities (Kane et al, 2014).

It is clear from the literature that the Big Society agenda and its adoption by the coalition government, did have a significant impact on many charities. Whilst for many this was not necessarily about increased funding, it did lead to what some have described as a change in the culture within the sector, which increased competition between organisations (Macmillan, 2013). Being engaged in commissioning processes added to this sense of competition.

**Commissioning and the Third Sector**

There are a number of definitions of commissioning and how the concept and term is to be distinguished from other terms, such as purchasing, procurement or provision, is unclear (Bovaird et al, 2014). Perhaps the simplest definition is by the Department

for Communities and Local Government, which in 2011 stated that it is about ‘making the best use of all available resources to produce the best outcomes for our locality’ (in Thomas, 2013:5). As Thomas notes, this simple definition however, belies how complex the process can be in practice. NCVO (2018) state in their guide for charities and voluntary organisations that the commissioning process is divided into four main phases; analysing, planning, sourcing/procurement and monitoring and evaluation. Analysing is about commissioners understanding the specific market, identifying need and researching existing services. The planning phase involves creating a procurement strategy, and sourcing starts with putting a contract out to tender and then awarding it based on specific terms and criteria. Finally, and in response to those terms, that contract is monitored and then reviewed, and decisions are made as to whether the contract continues.

This focus on commissioning has been linked by academic scholars to the Coalition government’s agenda of personalisation, the diversification of the provision of welfare and crucially, the concept of rewarding outcomes (Rees et al, 2014). As the drive to commission services became more central to health and welfare provision, incentives to take on and deliver services and the concept of payment by results, continued.

Critics of commissioning have questioned whether this lengthy and costly process would actually lead to changes in the outcomes for communities (Macmillan, 2010; Rees et al, 2013). Whilst it is recognised that the move away from short term and process driven contracts with Local Authorities was positive for charities, concerns were raised about whether those responsible for commissioning services were able to truly understand the outcomes they hope to achieve, particularly when the issues involve people with complex and multifaceted needs (Lloyds Bank Foundation, 2016). Whether in practice, they would be able to successfully and in a meaningful way engage local stakeholders and communities, in the planning stage of the commissioning process. And finally, if they were able to effectively measure outcomes and the impact of the services they commission, given the complex issues charities were hoping to address (Crowe et al, 2014).

Further criticism centres around whether the introduction of commissioning processes has simply created a ‘shadow state’; that charities and smaller third sector organisations have been pushed out and that private sector oligopolies have been created (Crowe et al, 2014). Due to the restrictions within the commissioning process and prequalification rules which are decided at the sourcing phase of the process, many smaller charities lack the scale, financial stability or “cut throat” values to succeed and be successfully commissioned (Lloyds Bank Foundation, 2016). In the case of Social Work Practices for example;

> *‘Commissioning was experienced as an arduous process for all concerned despite the support provided by government appointed consultants. Small groups of social workers who came together to bid for a professional partnership were disadvantaged and dissuaded by the time required and their lack of business experience. Larger organisations with the infrastructure to support the bidding process fared better’* (Stanley et al, 2014).

Whilst smaller charities were urged to overcome this by working in partnership with larger organisations (Rees, et al 2012), it was and remains clear, particularly in health settings, that private companies are increasingly the winners in this competitive culture. Some would go so far as to argue that this culture of commissioning has meant that what was previously public money, is slowly turning into private wealth (Social Enterprise UK, 2012).

Jones (2015) highlights that there is concern that private companies can set up a non-profit subsidiary, which is eligible to apply to deliver services commissioned by Local Authorities or the National Health Service. The “parent” private company ensures it is responsible for setting the policies and practices in this non-profit subsidiary, and then charges them for use of their services, such as rental of their buildings or use of administration staff at fees which they set. Engaging in this practice enables the private company to make a profit from the state funding and increase the wealth of international venture capitalists, shareholders, company executives and accountants (Jones, 2015). This has a significant impact on traditional and small charities and their ability to compete with these organisations and therefore their ability to survive in a competitive market.

A report published by the Lloyds Bank Foundation in 2016 highlighted how commissioning threatens the survival of small charities. It collated evidence from 120 separate tender processes including those from Local Authorities, Clinical Commissioning Groups, Police and Crime Commissioners and central government, concluding that the commissioning culture imposed on the third sector makes the work of charities 'even harder' (2016:1). The report noted that the requirements of a commissioning process can prevent many small and medium scale charities from applying, with many simply not having the resources to dedicate to the tender process. In addition, the generic nature of many tender processes raises questions about their validity, within a sector which is so diverse in the services it offers to a range of different communities. This has significant implications, not only for the sector but for society more broadly, with a concern that some communities and groups of people could be marginalised. Many smaller charities provide services which rely on local expertise or issue specific knowledge and these charities may not be able to survive if they are unable to engage in a commissioning process (Rees, 2014). These issues relating to small to medium charities and commissioning have been compounded by the introduction of the Public Services (Social Value) Act.

**The Public Services (Social Value) Act 2012**

The Public Services (Social Value) Act received Royal Assent in 2012, came into force in January 2013 and was administered by the Cabinet Office. It placed a duty on all public bodies (Local Authorities, government departments, NHS trusts, clinical commissioning groups, fire and rescue services, housing associations and police services) in England to consider social value ahead of procurement, as part of commissioning processes (National Association for Voluntary and Community Action, 2014).The intention with this law was to ensure that commissioners consider not only the financial benefits of a proposed project when funding it, but also the overall value it offers to the community in which it will happen. It deters decisionmakers from simply asking how much a project will cost, but to understand and take in to account the added and collective benefits it may generate (Arvidson and Kara, 2013). To take an example, the primary benefit of a charity delivering a cookery course to young mothers could be to improve the nutrition and therefore health of both the mothers and their children. This could have a positive impact on

the NHS, if better nutrition leads to fewer trips to the GP or hospital. The social value of this project could include; greater social inclusion for these families as they meet with other mothers to engage in a positive activity, increased community cohesion, especially if mothers come from different cultures, increase employability of the volunteers who deliver the project.

The implementation of the Act could be deemed as positive for charities. Arguably the third sector has an advantage over other types of organisations in generating social value, because they are often deemed to be value driven and based on solidarity and compassion (Blake et al, 2006). That the aims and activities of third sector organisations are underpinned by social values, such as altruism and community and therefore also generate them, for example as community cohesion (Arvidson and Kara, 2013). Billis and Glennerster concur with this argument and describe third sector organisations as 'more effective suppliers' of welfare services (1998:87), especially in meeting the needs of people who are vulnerable and marginalised. They explain this advantage as being due to 'stakeholder ambiguity', which occurs because the traditional divisions of stakeholders found in other organisations, such as organisational owners, employees, customers, often overlap in third sector organisations. For example, people who originally connect with the organisation for support can become volunteers, or employees also volunteer. This enables a flexible approach to needs, which other organisation are unable to compete with because they are either, in the case of commercial companies, guided by shareholders seeking profit, or in the public sector, mindful of voter prejudices (Arvidson and Kara, 2013). Such stakeholder ambiguity creates an informality between service users and service providers, which combats prejudices that are often based on fear and stigma (Billis and Glennerster, 1998). Therefore, third sector organisations may have the potential to generate greater social value, because of their structural characteristics, which makes them more accessible to marginalised groups. If third sector organisations are at an advantage at generating social value, the issue of how this is translated and evidenced in bids (or reports) remains, especially how this is achieved in a way which enables commissioners to effectively make decisions about resource distribution. It begs the question of how do third sector organisations successfully and consistently capture and articulate the social value of their organisations? Arvidson and Kara (2013) argue that evaluations are

essential in this. Whilst third sector organisations may recognise the value of thorough evaluations, research suggests that many small charities lack the capacity and level of resources required to complete them thoroughly, particularly in times of financial constraint (Arvidson and Kara 2013, Liket et al 2014, Polonsky and Grau, 2008). As Baroness Stedman-Scott (the CEO of an employment and training charity) recognised in a document commissioned by the New Philanthropy Capital (published following an 'impact summit' of charity leaders), 'the impact measurement process is complex and expensive and to get it right takes time, focus and internal resources' (Lumley et al 2011:2). Thus, according to those in the sector, ensuring that evaluations are completed, and that social value and impact is articulated effectively often requires specialist skills and knowledge, and at the very least the provision of dedicated time to achieve it.

There appears to be a vicious circle for organisations, where limited and competitive funding opportunities are leading to reduced resources, which for some can lead to the marginalisation of robust evaluations in favour of frontline service delivery, but this is then detrimental to their future funding bids and strategic development. As Liket et al report in their paper about evaluation processes in the third sector, 'Empirical evidence indicates that non-profits struggle to perform useful evaluations, especially when conducted under accountability pressures' (2014:171). It is noted that evaluations can become driven by collecting data, but that the data remains unanalysed nor used effectively in funding bids or strategic decision making.

**Recognising Heterogeneity**

Understanding and highlighting policy and the political and economic landscape is useful to this study, because it provides the context in which the charities in the present study have survived and sustained their operations. It also explains the context in which some organisations have been forced to close, and how challenging it can be to navigate and endure political and economic change. Furthermore, it contributes to a better understanding of how each charity in this study positions themselves in relation to statutory services (See Chapter Six). However, it is important to note, especially in light of the discussion earlier in this chapter which recognised the varied and difficult to define nature of the third sector, that neither the third sector, nor the charities in the present study are an homogenous group of

organisations, which respond to political changes identically. It would be wrong to assume that all charities are affected by the environment in the same way (Macmillan et al, 2013). For example, it could have limited relevance to charities that do not rely on funding from the state. Or, as this chapter has already discussed, a mixed market approach to welfare could create opportunities for some.

An acknowledgment of this lack of homogeneity is especially pertinent for this study, because the three charities being researched do not operate within the same areas of need. Their activities vary, and their beneficiaries are different. For example, one charity offers family support, one provides support for people with cancer and one offers free advice. Inevitably their response to changes in context will vary and they will be affected by some policy changes in different ways. Understanding and acknowledging the general context in which charities exist is useful to set the scene for this study and, as the next chapter will discuss, has influenced the choice of theoretical lens adopted. Equally though, internal factors are important when considering sustainability and any theory choices must enable this dual perspective.

**Conclusion**

The purpose of this chapter was to draw on relevant literature, to set the scene for the study, and specifically to inform and underpin the theoretical approach. Which follows. Definitions of a charity have been reviewed, to clarify the term and status of the three organisations which are the focus of this study. I have highlighted the complexities of defining the third sector, which the charities are associated with, and drawn on the work of other scholars to consider what has been previously proposed. This is useful when understanding the context in which charities operate and to underpin the discussion in subsequent chapters. It then provided a brief review of key policy changes affecting charities over the last three decades, describing the political and economic environment within which the charities in this study have and continue to operate in. Taking a chronological approach, detailed shifts in policy imposed by successive governments have been described, broadly categorised as New Public Management, Third Way and Big Society. It also discussed commissioning and The Public Services (Social Value) Act and the impact of both on charities.

# Chapter Three - Theorising the Third Sector: Adopting Three lenses

## Introduction

Within academic literature, the third sector has been described as a 'loose and baggy monster" (Kendal and Knapp, 1995), because of the lack of consistency in defining it (Alcock and Kendall, 2010). Inevitably, this has consequences and is problematic for those who endeavour to theorise the sector. Corry (2010) recognises that intrinsic to the problem is the terminology used. 'Third' immediately places the sector in a residual classification after the primary and secondary sectors of the state and the markets, and residual categories are commonly prone to uncertainty and less formality. This is reflected in practice, with the sector incorporating a multitude of different types of organisations which cannot be classified as being part of the state or commercial sector, for example, social enterprises, charities with commercial arms, clubs and self-help groups. This diversity must be reflected in any analysis of the sector.

Lorentzen, 2010 discusses this lack of formality and recognises that diversity is an issue, but it is also the fact that these organisations have "non-systems" qualities which unites them. That unlike organisations from the other sectors, they are difficult to regulate or to plan for as a combined sector, for fear of them or the sector as a whole, losing some of its innate qualities, such as voluntary participation and value-based ethos. Attempts to make third sector organisations more formal, would in fact be counter intuitive to why and how they exist. This subordination from the other sectors is recognised, particularly in relation to politics and policy;

> *'The charity sector is known as the third sector, and the truth is that is a fair reflection of where it sits in the political pecking order. Despite rallies of interest from governments over the decades, it has never really been integrated into political thinking' (Wilson, 2017: np).*

Inevitably, there are numerous implications for the organisations associated with the sector, especially in relation to funding and policy, but in terms of academic

research, it has also meant that the sector is comparatively under theorised (Alcock, 2010).

My analysis of the literature, mirrors the findings of Corry (2010), who recognises that third sector research generally falls into two categories, studies which place an emphasis on defining the sector and those that theorise it. Scholars who adopt the direction of endeavouring to define it, take an ontological approach which is focused on understanding the sector as a type of institution, or group of actors, that share specific characteristics, such as Alcock, 2010. They are often interested in comparative studies (Anheier and Seibel, 1990) and ideas such as distinction; what sets third sector organisations apart from the state and markets. I initially considered this as a direction for this study and was interested to explore how the three charities offer a distinct service, which creates a need for them and whether this is directly related to their sustainability. However, this relies on an exploration of organisations from other sectors and therefore would have required access to those organisations, in order to achieve a meaningful and rigorous comparison. I wanted the focus to be on the charities, on why and how they understand themselves to be functioning and what can be learned from this, in relation to survival. Thus, for this study, the charities are the primary focus, they are not relegated to third place.

As a consequence, I decided to adopt the second approach detailed by Corry (2010), which is epistemological and considers and then explores the third sector as a social process. How elements such as structure, organisation and identity come to be made real and defined and understandings of them on the ground. Rather than looking for another sector to relate it to and derive knowledge from, I consider what communicative and organisational forms allow the charities I have studied to form, function and sustain. Whilst Corry's delineation of the two approaches was written in relation to the third sector as a whole, and has a macro level perspective, this epistemological approach is also relevant to micro level exploration, which focuses on a small number of charities. Taking a processual approach to theorising enables a focus on phenomena such as identities, discourses, narratives and practices, as a means to discover knowledge relevant to sustainability.

In response, this chapter will discuss the processual approach adopted in the present study and the theories I have drawn on in order to explore the organisational elements which contribute to successful sustainability. It will detail the theoretical framework I chose to employ, to study the charities from a social process perspective, which integrates elements of three different theoretical approaches; Organisational Identity Theory (OIT), Resource Mobilisation Theory (RMT) and Social Practice Theory (SPT). These provide contrasting lenses to inform my methodology and data analysis. The chapter reviews the relevance and compatibility of these theories to this specific study, and how I have combined them as a means to produce novel analyses and new knowledge about the third sector.

**Sustainability and Third Sector Research**

At the heart of this study is identifying and then "unpicking" sustainability. I am not concerned with why some charities fail, rather, how it is that some survive. How is it that some charities continue to operate, in spite of the challenging and unstable financial environment in which they exist and what properties or characteristics do they possess? To begin to address this question I turned to existing literature to understand what, if anything had been written about survival and charities.

Whilst there is discussion about charities and concerns about organisational survival within the sector, for example in blogs, publications and websites written from a practice perspective, a focus on survival is not prevalent within academic literature. There are some notable exceptions. Macmillan et al (2013) explored qualitative longitudinal data which considered how third sector organisations are affected and have endured the challenging and shifting financial environment. Drawing on a "field"-based theoretical perspective, they explore organisational change and focused on staff redundancies, organisational restructuring and repositioning and branding as change strategies. This paper became a key text in my review of the literature because it explored how third sector organisations continue to operate, it made me consider whether change was the key to sustainability, or whether there were other factors. It prompted me to consider elements which do not change, whether some adaptability and having change strategies is important, but whether there are other elements that contribute to sustainability which are retained in the context of environmental change.

Gras and Mendoza- Abarca (2014) explore organisational survival in non-profit organisations and consider whether by developing and exploiting market based opportunities increases their chances of survival. It draws on Resource Dependency Theory and identifies that those organisations which generate low to moderate levels of market based income, are more likely to survive than those who generate high levels of income. Describing it as a U shaped relationship. The focus on income generation as a factor in survival in this study is very specific and at this point I was not aware whether any of the charities in this study did generate income, however it prompted a greater consideration to the role of resources in organisation sustainability.

Given this lack of sector specific research, I turned to the organisational studies literature to explore whether parallels could be drawn to guide my theoretical approach. Abatecola (2013) has written about key factors for survival across the organisational life course of commercial businesses and this led to my first theoretical decision. Writing about the high mortality of start-up businesses, he refers to Stinchcombe's (1965) concept of the "liability of newness". He discusses how the mortality rate of organisations is at its peak in the early years, but that this consistently decreases over time, which prompted me to think about how each charity formed and how they managed to sustain their operations during the initial years. It encouraged me to focus on organisational lifecycles and what factors could be key to navigating through, and surviving, challenging life cycle moments.

Van Tonder and Lessing (2003) discuss the connection between organisational life cycles and identity, claiming that identity is a life-cycle linked phenomena. They recognised that having a strong organisational identity may become more salient during challenging stages and is key to sustainability. It is at times when an organisation could be vulnerable, that its identity must be sensitive to change. This is very pertinent for charities (and the third sector as a whole), because of the challenging nature of the political and policy environment in which it operates and especially in times of financial constraint and austerity.

This interest in the formation of the charities, how they managed to overcome the liability of newness and the role of organisational identity, prompted my decision to

explore and adopt organisational identity theory as a lens through which to study my selected charities. To consider how their identity informed both their formation and their subsequent operational activities, how they are perceived by those who are connected to them and whether identity is linked to their ability to adapt and survive in a challenging environment.

**Organisation Identity Theory**

There is a significant body of both academic and non-academic literature about organisations and organisational theory, where the concept of organisational or corporate identity is explored (Albert and Whetton, 1985, Parker, 2000, Pullen et al, 2007, Stensaker, 2015, Hatch and Schultz,1997). Within the marketing literature there is a focus on corporate identity and how organisations articulate and differentiate themselves in relation to their stakeholders and external audiences (Hatch and Schultz, 1997). Unsurprisingly, this area of research considers branding, marketing, leadership and perhaps most importantly, increasing a company's profit. More recently and in response to organisations recognising an increasing need to 'position themselves as distinct from others' (Grant and Hardy, 2004:69), organisation theory has become more concerned with the relationship between organisations and their employees, taking the view that the identity formation process is in response to social interactions. Organisations questioning, "what kind of organization are we?".

There is a much smaller array of scholarly literature in this field that specifically explores charities. That which does exist is predominantly about membership bodies and educational establishments, in contrast to what one might consider to be "traditional" charities (Forbes and Seena, 2006 and Gonzalez and Chakraborty, 2012) or the types of charities explored in this thesis. As Ward notes, in the UK context, the breadth of work around organisational identity, relating to the third sector is limited (2013). Despite a lack of sector specific literature, that which does exist can offer valuable insights into the importance of a strong organisational identity in charities, particularly when considering their sustainability in challenging economic circumstances. Inevitably, in non-profit organisations, the impetus to create a distinct and positive identity does not relate to revenue and profit, as in the commercial sense (the clue is in the name), but I would argue that it can have an impact on the

ability to acquire and mobilise resources, such as funding, staff, volunteers and service users, which in turn can impact on the practices of charities and their ability to survive.

Organisational identity, from an internal organisational perspective, refers broadly to what members perceive, feel and think about their organisation. It is assumed to be a collective, commonly-shared understanding of the organisation's distinctive values and characteristics (Hatch and Schultz, 1997). From an external perspective, a strong identity is important, to enable the public and funders to understand who they are, what they offer and why they are distinct from other organisations. Arguably, a strong organisational identity is especially important to charities, because they must be flexible to the changing environment in which they exist and still retain a strong sense of who they are and what they stand for (Young, 2001). Albert and Whetton (1985) state that there are certain circumstances, when having a strong identity becomes vital to sustainability for an organisation, those being when an organisation forms, if a sustaining element such as a founding leader leaves, if they experience rapid growth, or have to change their organisational structure because of retrenchment. Many charities will experience these circumstances, whist having to respond to changes in funding and increased need for their services. Young states that 'choosing an identity is tantamount to an organisation's defining a "North Star" by which to navigate its course of action and shape strategy (2001:155)' This is often linked in the third sector to a charity's mission and aims. Indeed, a strong commitment to organisational values and mission has been described as a defining characteristic of the third sector and especially to those organisations which deliver services to vulnerable people with complex needs (Chenhall et al, 2016), as discussed in Chapter Two.

The most widely quoted definition of organisational identity, within organisation studies, is by Albert and Whetton (1985) and derives from what some have described as the watershed article on this topic (Pullen et al, 2007). In this, organisational identity is characterised as 'a self-reflective question' (1985:264) about the essential features of an organisation. It is proposed that those features can be categorised into three criteria: (a) what is taken by organisational members to be central to the organisation; (b) what, in the eyes of the members, makes the

organization distinctive from other organisations; and (c) what are perceived by members to be enduring features, that link the present organisation with the past (Albert and Whetton, 1985, Gioia, 1998; Aust, 2004). This interpretation has since been refined to also recognise that identity is a dynamic concept, a process which can vary in relation to context (Hatum et al, 2012, Scott and Lane, 2000 and Gioia et al, 2000). This is particularly pertinent in relation to this study, because as identified in Chapter Two, the context in which third sector organisations must operate is constantly changing, as Hyndman puts it, '...it is a sector that is changing, or perhaps, more correctly, it is a sector that is being changed by the external pressures that it faces' (2017:149), and therefore a strong sense of identity could be deemed important, if not essential. However, whilst identity can provide a useful 'psychological anchor' for its members in times of 'uncertainty and change' it may also 'lead to inertia, or a resistance to progression' (Hatum et al, 2012: 306).

Organisational Identity can be understood as a fluid process, where the organisational self is being perpetually co-produced in the exchange between internal and external definitions, which are constructed by the organisation's stakeholders (Schultz, et al, 2012). How identity is articulated can become visible in at least two ways; in conversations or activities engaged in by those categorised as being "insiders' in an organisation, for example, two people who work for the charity, or between insiders and outsiders, such as between an employee and a funder. These articulations can occur in a myriad of different ways, such as in reports, conversations, letters, photographs and web-based methods (Sillince and Brown, 2009). The first data chapter in this thesis, Chapter Six, is an exploration of these articulations, which relates to both theoretical perspectives described above, in that it will explore the central, distinctive and enduring features (Albert and Whetton, 1985) of each charity, whilst also recognising the process of the co-produced identities, which are formed through 'interactions, associations and conversation' (Schultz et al, 2012:3).

**Organisational Identity and its Interaction with the External Environment**

Organisational identity is shaped and influenced by the organisation's external environment (Hatch and Schultz, 1997). Sensitivity to that environment is essential in the endeavour to be adaptive and responsive to external forces which affect

sustainability. If an organisation loses its capacity and ability to process and internalise information from its environment, it can lead to an identity crisis, which consequently could lead to its demise (Van Tonder and Lessing, 2003). An additional consequence of a lack of environmental sensitivity, would be an organisation's ability to acquire resources from that environment.

Gras and Mendoza-Abarca recognise that organisational sustainability is dependent on an organisation's 'ability to successfully interact and draw resources from their environment' (2013:394). Organisations rely on a flow of resources, such as money and people to operate, however, events in the environment which are uncontrollable, could increase or decrease the resource pool and have a direct impact on their acquisition. The primary problem is not that organisations must depend on their environment, but that those environments are not dependable (Pfeffer and Salancik, 1978). The environment is composed of other organisations and actors, which means that the survival of the focal organisation can only be achieved in direct relation to its ability to manage transactions with and the transference of resources from other organisations and actors. Those organisations and actors are in possession and control of the relevant resources and how and to whom they are bestowed (Hillman et al, 2009). This connection between organisational identity, environment and resources led to a second theoretical approach, Resource Mobilisation Theory.

**Resource Mobilisation Theory (RMT)**

There is an undeniable link between organisational sustainability and the acquisition and mobilisation of resources. Organisations need people, space and money to form and operate. Returning to third sector research, I was interested to explore literature about the third sector and resources. The work of Hrafnsdóttir & Kristmundsson (2017), concerning volunteers in non-profit organisations recognised the multi-functional benefit of resources. They use the example of volunteers as an essential human resource who not only offered their time and expertise, but often were catalysts to the acquisition of other resources, such as funding and space (2017). This prompted my own questions about the resources required by my selected charities to function, how they are effectively aggregated and specifically, the relationship between resource mobilisation and organisational survival. In particular,

how identity might work as a resource mobilisation mechanism, which has to change and adapt in order to respond to the changes in socio-political environments.

RMT is relevant to these questions. Although devised as a means to theorise social movements, not third sector organisations, it offers useful insights that provide an analytical tool to study the relationship between resources and sustainability. RMT first appeared in the 1970s in the US literature (see Jenkins 1983; McAdam et al, 1988 Edwards & McCarthy 2004a). Theorists sought to better describe and explain social movements and new forms of collective action, which emerged in advanced capitalist societies during the 1960s (Melucci,1980). Theorists rejected previous assumptions by scholars in the field, which proposed that social actors who engaged in social movements were 'deviant or anomic' and held grievances, which they had a reasonable chance of getting heard if they engaged in the political process and in social movement activity (Edwards and Gillham, 2013:1). RMT theorists redefined these social actors as rational and often marginalised. They recognised that societal grievances are ubiquitous in every society and therefore cannot be the only reason for the emergence of a social movement (Klandermans, 1991). They became more interested in how social actors effectively mobilised themselves within groups to pursue their goals of social change (McCarthy & Zald 1977; Tilly 1978; McAdam et al, 1988). The availability of opportunities for collective action, and perhaps more importantly resources, were central to the emergence and survival of social movements (Klandermans, 1991). Thus, it was the emphasis on resources which led to the coining of a new vocabulary and the conceptual framework of RMT.

In response to this shift in perspective, scholars such as Minkoff (1995), Smith et al (1997) and Andrews (2004) re-orientated the exploration and analysis of social movements from a social psychology perspective, which focused on the individual social actors, to organisational sociology. This adopted the perspective that a social movement is a 'set of preferences for social change within a population', which could be about changing social structures or reward distribution (Edwards and Gillham, 2013:1). When considering how a set of preferences within different sections of society translates into collective action, those taking a mobilisation perspective were interested in any pre-existing organisation of social actors. Specifically, they considered whether social actors shared the same preferences, and suggested that

social movements which have some form of internal organisation are more likely to develop into organised forms. Zald and McCarthy (1987) provided a term for these, which is Social Movement Organisations (SMO).

Significantly, in relation to the present study, while the theory was originally developed to explain grass roots social movements, it has been argued (Zald, 1992) that it is better suited to the analysis of more professionalised social movement organisations, for example, larger movements such as Green Peace or the Women's Movement. This is because of its focus on the organisational elements and structural factors, which could be less apparent in small and emerging social movement groups. This is where comparisons between organisations in some of the later empirical studies using RMT and the charities in the present study are more salient. Both types of organisations rely on a combination of paid employees and voluntary staff and, as will be discussed later in this chapter, many of the types of resources and how they are acquired and aggregated have similarities. One of the most useful and relevant elements of this theory is its recognition of resource inequality in society, which can be translated and used to explore small and medium charities in the UK.

**Resource Inequality**

The original proponents of RMT were particularly concerned with the pattern of the availability of resources from external sources, specifically material resources in the form of money (Edwards and Gillham, 2013). Zald and McCarthy (1987) articulated a distinction between the role of the 'mass' population and the 'elites' in mobilising resources. They claimed that populations, whether they connect with a Social Movement Organisation (SMO) as an adherent, constituent or a bystander, can only provide a limited resource pool, which is mostly their own time and labour. Whereas elites control larger resource pools, especially money in the form of funding. Where theoretical explanation has advanced and become more useful for this study, is that analysts have addressed and been more explicit in their recognition of the uneven distribution of resources within society (Edwards and Gillham, 2013). In addition, in more recent theoretical work, there is greater analysis of how organisational actors, both individually and collectively, have endeavoured to make shifts and alter this distribution, with a view to directing resources more efficiently to SMOs.

The availability of resources is temporally and spatially contingent (Edwards and McCarthy, 2004:118). RMT therefore provides a theoretical framework that recognises three sources of variation in resource availability; spatial, historical and social. Spatial variation in resource availability is a significant factor in the UK context and particularly when considering third sector organisations. As the UK Civil Society Almanac details, there is a significant disparity between resource allocation in urban areas, compared to rural ones, and between geographical locations.

> *'In England and Wales, charities in urban areas overall tend to receive more money, with more than three times the income of charities in rural areas. There are more voluntary organisations, and more per thousand of the population in the southern regions of England than in other parts of the country. 50% of voluntary organisations in England are based in London, the South East and the South West' (Crees et al, 2016).*

Whilst higher populations in urban areas accounts for this to some extent, social problems more associated with urban areas (and increasingly suburban areas), have consistently garnered more philanthropic, media and political attention than rural areas (Edwards and McCarthy, 2008). This has an inevitable impact on resource availability and allocation.

The value (or use value) of resources and their availability can vary over time. A good example of this are information and communication technologies (ICT's), which have become increasingly valuable to organisations over recent decades. Today, organisations rely on ICT to facilitate the acquisition of resources, such as volunteers, fundraisers and employees, when even fifteen years ago, this would not have been the case. Conversely, office equipment, such as fax machines and access to files of postal addresses, has increasingly become obsolete as communication has become digitalised.

Time, particularly when linked to political change is also crucial in considering the availability of resources. Historically, different governments, have varied in their willingness to contribute resources to the third sector. Initiatives such as New Public Management, the Third Way and the Big Society were launched across time with differential impacts for the sector (Chapter Two). Therefore, moments in time and

history bring particular challenges for many small and medium charities, and have significant impact on their ability to survive, or at least thrive.

The third category of variation in resource availability, and one which intersects with both space and time, is that of social inequalities. The literature consistently recognises that those from more affluent groups are more likely to donate to charity (NCVO, 2011). The Charities Aid Foundation, in their yearly report of charitable giving in the UK, cites that the demographic which gave the most money to charities last year are older females, from higher socio-economic income groups (2017). Those who are more affluent have access to more material resources and therefore are able to mobilise them for causes and organisations to which they are sympathetic to. This is evident later in the thesis in the discussion about human resources, where one charity uses predominantly older, retired volunteers, who due to their financial stability, are able to offer their time as a resource.

Indeed, affluence and how this leads to the development of a SMOs is particularly relevant to this study, because of the nature of how and why the three charities began. Kerbo (1982), in his critique of RMT suggests that the theory does not pay enough attention to the variation in structural conditions in which SMOs are instigated. He proposes two types of SMOs; movements of *crisis* and movements of *affluence*. The first recognises that collective action can occur in response to life disrupting situations, for example unemployment, food shortages, disasters. In such situations, daily routines are disrupted to an extent that could lead to discontent and even social disorder. Movements of affluence are different because the major participants and instigators are not motivated by a political or economic crisis which is directly affecting them, but by the needs of others. Their lives are not directly affected, nor are their basic needs not being met. On the contrary, they may experience an abundance of resources in the form of money, time and space and therefore are able to offer and mobilise these to help the endeavour of others to meet the social goal of an organisation. For example, to ensure everyone has access to welfare rights, or that people affected by cancer can access support services. All three charities in this study would be considered organisations of affluence within Kerbo's distinctions, which is particularly relevant to the empirical

data explored later in this thesis, when the discussion centres around organisational identity, power and relationships.

**Resource Redistribution**

A report in 2014 by the Centre for Social Justice found that in areas of social deprivation, there were fewer charities operating than in more affluent areas. They described these areas as being charity deserts, stating that there are hot and cold spots for charitable activity. Whilst these are the concerning realities of social inequality in resource distribution for small organisations, there are individuals, groups and agents of the state who endeavour to redress and re direct the distribution of resources. As Edwards and McCarthy note in relation to SMOs, often motivated by factors such as 'altruism, enlightened self-interest, compassion or a commitment to a particular ideology' (2008:120), they attempt to counteract prevailing patterns and support particular organisations. For example, the state offers monetary resources in the form of funding to selected organisations, if they meet specific criteria and agree to particular service level agreements. This usually applies to large organisations however this can trickle down to smaller, more local organisations with similar aims and goals.

Indeed, other organisations can be key in redistributing resources. Philanthropic foundations and religious organisations provide funds, via grants, to smaller charities, often specifying how their money should be spent; For example, to fund activities in areas of deprivation, or specifically for rural projects. Smaller charities can rely on grants from a number of different organisations, which enables them to pool material resources. However, engaging with multiple funding bodies also requires resource in terms of time spent applying and reporting to different organisations, all of which have different criteria and evaluation expectations.

Some commercial companies help redistribute resources to charities, by donating money directly to them, or setting up their own funding charities. Corporate social responsibility is not a new phenomenon for businesses, indeed it dates back for centuries (Carroll, 1999). However, as McWilliams and Siegel (2001) note the pressure to engage in social responsibility initiatives has increased in recent years, often coming from employers, suppliers and shareholders. Some companies, for

example supermarket chains, donate resources in the form of food, which can either be given directly to those who need it, or to help mobilise other resources. An example of this is where a supermarket chain provides food to an organisation for their volunteer training sessions and fundraising events. Whilst these donations are useful, and one assumes generally well received, corporations also benefit from their philanthropic endeavours via tax relief for charitable giving and positive publicity. They are in control of what they give and who they give it to, which creates a particular power imbalance between the corporation and the receiving organisation.

Individuals can also contribute to the redistribution of resources. This could be by donating money, or offering other material resources such as office furniture or computer equipment. Another way this happens is when individuals bequeath money to a charity, with some charities able to attract more resources in this way than others. In this circumstance, individuals are often people who have been connected to the charity, who would be considered internal sources.

**Resource Access**

Edwards and Gillham (2008) propose four mechanisms of resource access; aggregation, self-production, co-optation/appropriation and patronage. Aggregation refers to the way in which an organisation is able to convert resources from different individuals into collective resources, which can be utilised by internal movement actors. In other words, they draw together resources which have been privately held and then offered, as a means to pursue collective goals. This could be private donations and or offers of materials to be used by a charity to deliver a specific goal. An example would be if an organisation fundraises for a specific project, for example to start a support group for women affected by domestic abuse. They apply for funds, perhaps from foundations or local companies, and ask people to offer toys, or food to enable the group to run. Different types of resources are pooled to meet objectives.

Self-production relates to the internal capability of the organisation to either produce their own resources, or for internal actors to add value to resources aggregated externally. For example, they might train volunteers to deliver different aspects of their service, such as helping to fundraise or to advocate for the organisation in the

community. They might use money donated by external actors to produce goods, such as t-shirts, mugs or greetings cards, which can be sold as a means to create further monetary resources, both through direct income and as a means of advertising. Self-production is a cost effective and smart way for charities to access resources because it ensures that the organisation's identity is promoted.

Co-optation/appropriation involves drawing on and utilising resources from other, existing organisations, with the 'tacit understanding that those resources will be used in mutually agreeable ways' (Edwards and Gillham, 2008:3). This is especially evident in organisations affiliated to umbrella organisations, from which their local charities derived from. Essential resources, which enable them to operate and achieve the organisational goals, are replicated and appropriated. For example, the use of policies and procedures which are essential when applying for government grants or funds from most foundations. Charities often utilise resources appropriated from the public sector, such as spaces and buildings to deliver services.

The final mechanism for resource access is patronage (Edwards and McCarthy, 2008). This refers to when either individuals or an organisation bestows resources. With monetary patronage, it is generally someone external to the organisation, who offers a substantial amount of money and in return would usually expect some form of proprietary control on how their money is spent. They might also attempt to influence operational policy. Examples of this include government or foundation grants and significant sums of money from individuals.

**The Resources in Resource Mobilisation Theory**

As the title suggests, resources are central to this theory, yet despite this there is a lack of consensus in the literature as to how they are conceptualised and identified. Relating to the empirical data from their studies, authors have proposed taxonomies of resources. For example, Cress and Snow (1996) identified four resources; moral, material, informational and human, related to the formation and survival of Homeless SMOs. Edwards and McCarthy (2006), extend that list to produce what they described as a typology that also included cultural and social-organisational resources. The two resources which were identified across all the literature, were material and human resources, which are the main focus of my analysis.

The RMT literature separates human and material resources as distinct categories (Edwards and Gillham, 2013 and Edwards and McCarthy, 2006). Describing human resources as the labour, experience, skills and expertise that people bring to an organisation (Edwards and Gillham, 2013) and material resources as the money, property, office equipment and supplies which an organisation acquires (Edwards and McCarthy, 2008). Whilst making this distinction is understandable and could have benefits when trying to ascribe value to resources, for example in funding reports, it lacks any recognition of the body as a form of material resource. It creates a separation between what is considered to be human, and bodies that have a materiality and cannot be separated from the human they belong to. Taking a slightly different approach to the RMT literature, I recognise and want to explore the intersection between the two categories of resources. To acknowledge and consider the human body as a material resource and how it can be mobilised, utilised and influence access to further resources. For example, the body can provide muscular labour, such as someone helping to move furniture in an office move, it could offer intellectual labour if someone is able to analyse data for funding reports, or it could provide emotional labour if someone can connect to another person through a shared experience and empathy. Furthermore, material resources such as office space and artifacts can affect human response through the embodiment of organisational spaces, which consequently impacts the mobilisation of further resources such as money or volunteers.

RMT recognises that resources vary in their attributes, which also affects how easily they are mobilised. Edwards and McCarthy (2008) describe how resources fit on a continuum of whether they are on the one hand, fully fungible and therefore independent of context, or fully context dependent. Money is the most fungible of the resources because a pound is interchangeable with another pound, its value does not change depending upon the context (although of course the value of the pound can vary in relation to other currencies, but for the UK organisations in this study, this is not an issue). Money can be used to purchase other resources, such as equipment and employ staff. The quest to secure funding is constant for most third sector organisations and plays a significant role in their survival.

On the other end of the continuum, context specific resources are those which are specific to the social goal, and to a time and place. For example, specially designed t-shirts for a sponsored event, or a student who can only volunteer during their summer holidays. Inevitably, context specific resources are less transferable. Mobilising context specific resources can be beneficial and form part of the identity of the organisation, which then acts as a mechanism for mobilising further resources.

**Resource Mobilisation Theory and this Study**

There is a clear link between the aggregation and effective mobilisation of resources and organisational survival. RMT is especially useful within the context of third sector research, because it takes in to account the structural and social issues that affect resource distribution, which is relevant to how different organisations are able to access certain types of resources and subsequently survive, where others may fail. It also provides a link between the literature relating to charities and the current socio-political environment. It therefore has potential to contribute to use of the theory within third sector research.

However, whilst the link between resource mobilisation and survival is integral, it does not provide a theoretical means to analyse and understand how the organisations use their resources in practice. It is an analytic tool for exploring how organisations acquire resources, but it does not enable an understanding of how the charities are able to effectively integrate and translate their resources into action and practice. Or, if and how their practices enable them to access further resources. In order to explore the link between resources and how the practices of each organisation relates to their sustainability, a different theoretical lens is required, which focuses on practices and collective action.

**Social Practice Theory**

Notions of practice as a unit of study and key features of what has become a recognised theory, were evident in different strands of social scientific enquiry at the end of the last century. For example, in the work of Heidegger, who recognised that praxis, not just language, could be a source of meaning (Shove et al, 2012). The following quote from Taylor, dating back to the early 1970s illustrates how practices were being recognised as a distinct unit of analysis;

> *'Meanings and norms implicit in […] practices are not just in the minds of the actors but are out there in the practices themselves, practices which cannot be conceived as a set of individual actions, but which are essentially modes of social relations, or mutual action'* (Taylor, 1971:27, in Shove et al, 2012:5).

Practice ontologies developed in sociology in the 1970s and 1980s, with Bourdieu (1977) and Giddens (1984) consistently recognised within the literature as scholars who inspired current practice theorists. Whilst there are a number of approaches adopted to the study of practices, they are all grounded in the notion that social life consists of social interactions, through which people transform and make themselves and their world (Spaargaren et al, 2016). It was at the beginning of this century when the practice turn became more prevalent, which many authors (Shove et al, 2012, Meier et al, 2018, Nicolini, 2011) attribute to the work of the philosopher Theodore Schatzki.

The book, *The Practice Turn in Contemporary Theory* (Schatzki et al, 2001) brought together a number of theoretical positions under the practice banner (Shove et al, 2012). Shatzki developed the core conception of practices as arrays of human activity, which are dependent on shared skills and or practical understandings (Meier et al, 2018). Reckwitz (2002:249), developing the work of Schatzki, defines practices as;

> *'A practice is a routinised type of behaviour which consists of several elements interconnected to one another: forms of bodily activities, forms of mental activities, things and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge.'*

In this sense, a practice exists when these different elements combine, which consequently, makes it an entity that can be recognised, discussed, appraised and used.

Shove et al (2012) use the example of skateboarding as a social practice to explain how these elements combine. That the material object of the skateboard and the street spaces in which it is enacted, combine with the embodied competence

required to ride the board and navigate and understand the street space and therefore perform tricks. All this connects with the rules and norms which define this activity as a practice and their meanings to both the skateboarder as the practitioner but also outsiders. The practice of skateboarding becomes an entity, which is performed and reproduced by the 'carriers' or hosts of the practice. It 'exists and endures' because of the numerous re-enactments (Shove et al, 2012:7). Crucially, the skill and the importance and purpose of skateboarding is not just within the mind and body of the skateboarder, it is the combined elements that constitute the practice, which the rider is the carrier of. Theories of practice challenge traditional perspectives, which assumed that individuals are autonomous, reflective and calculating as the primary unit of social scientific analysis. Rather, theories of practice emphasise sequences and routines, practical consciousness and embodiment, the mutual recognisability of practices and the importance of materiality and the interdependence of activity and its environment (Meier et al, 2018).

**Practice in Organisations**

Nicolini writes about the connection between practice theory and knowledge production in relation to private organisations, and how 'knowledge resides in communities of practice' (2011:604). He recognises that phenomena, such as meaning, human activity and sociality are aspects of and effects of a nexus of human practices, which are interconnected. A practice focused approach to exploring organisations is useful when seeking to understand these phenomena better (Nicolini, 2011). He and others (Cook and Yanow 1993, Swan and Scarbrough 2005, Handley et al. 2006, Gherardi 2006, Suchman 2007, Chia and Holt 2008), have adopted theories of practice to explore organisations, in a move away from the traditional approaches within the field, which focused on individualistic and rationalist perspectives. Rather than framing practices as simply descriptions of what people do, located within individual behaviour, they instead locate practices as a primary unit of analysis within the organisation.

As Nicolini (2011) recognises, all practice theories belong to the same family of ideas, however there is not a unified practice approach to research and not one which can be specifically or easily assigned to the present study of organisations. A practice lens within social science emerges from a number of different scholarly

traditions and has led to the development of different practice-based approaches. Where there is consensus amongst scholars, is that practice theory foregrounds activity, performance and work as important in the understanding, development and the perpetuation of all aspects of our social world (Nicolini, 2011). The durable features of social life are always underpinned by the work and effort of someone. In this sense, the social world is viewed as a vast array, or collection of performances, which endure because they are inscribed in human bodies and minds, objects and texts and are entangled together in a way which means that one performance of a practice becomes the resource for another.

Organisations are places where those entanglements happen, where multiple practices exist and are performed, often at the same time. Organisations become not only the site, but also the result of the work activities, of the practices. Schatzki would describe these entanglements as bundles, as Nicolini (2011) states, organisations endeavour to ensure that the combining of social and material activities as practices continue in the same direction, as part of the organisational goal. They are teleological in Schatzki's terms. This teleology is an important device in analysing the fit between aims such as formal mission statements, and practices as observed and narrated on the ground.

When advocating for the adoption of a practice lens in organisational research, Nicolini recognises that a practice approach provides a means in which to "dissolve" (2011:3) but not resolve, the enduring issue of dualism which can occur in other scholarly traditions. For example, the dualism between actor and system, social and material, and body and mind. Practice theory cuts across this and takes what Schatzki (2016) describes as a flat ontological approach. For Schatzki, following Wittgenstein, a 'flat ontology holds that everything there is to a phenomena of some general sort is laid out on one level of reality' (Schatzki, 2016, in Spaaargaren et al, 2016:29). Practices, and the bundles and complexes which they form, become the central element, they are laid out on a single plain and not subsumed into conventional categories, such as actor and system (Schatzki, 2016). This is especially useful when interrogating how charities survive, particularly when applied as a lens in conjunction with other theoretical approaches, such as Resource Mobilisation Theory, which does the opposite. RMT's recognition and attention to

how structure and agency affect resource mobilisation offers one perspective, but practice theory allows analysis of resource mobilisations from a different ontological perspective to assess whether this offers additional insights into organisational survival.

When exploring how the charities have survived over time, the processual approach (Nicolini, 2011) which a practice lens provides, enables exploration of what happens in the organisations as ongoing, routinised and recurrent accomplishments. It enables analysis of how organisations remain in existence through the recurrent performances of practices, to consider how those practices might be recognised, for what purpose, and if and how they are dynamic. In order to exist, the charities in the present study establish practices associated with and in them. To draw on an example of one of the organisations in this study, a charity with a goal of offering free advice in the community must establish numerous practices relating to this and then connect them to work together to achieve that goal. Providing advice is not simply about helping people, but relies on multiple practices, such as the practice of volunteering, fundraising practices to pay for resources and training, interview practices, and the list could go on. These are all examples of integrated practices, which themselves are comprised of dispersed practices, which can be empirically discoverable. For example, asking questions, signing a rota, talking on the telephone, and searching for information. In response to the unstable and constantly changing and evolving environment in which charities exist, I am interested to explore how practices within organisations evolve, and their relationship to organisational identities and resources. How do practices endure, change and adapt and is there a process of transformation which is integral to sustainability.

**Elements of Practices**

To produce knowledge and enable me to investigate the nexus or bundles of social practices within the charities in this study, I needed to decide which definition of social practice would be most suited to this thesis. Various authors writing in this field offer similar definitions of what constitutes a practice, but where they differ is on the properties or elements of practices, which combine in human activity. They draw on different concepts to describe the elements (Spaargaren et al, 2016). Initially I was drawn to the work of Shove and her colleagues (2012). Their more simplified, or

streamlined approach combines just three main components which are *materials*, such as bodies, technology, physical entities, with *competences*, such as skills, know-how, techniques, with *meanings*, such as ideas, aspirations and symbolic meanings.

Their approach is particularly relevant when exploring how practices come in to existence, how they transform and how they fall away, which could be useful when considering how the charities have survived and when observing whether the practices within the charities have had to transform and change and perhaps cease entirely, in response to the changing environment in which they exist. There are elements of this theory of practice which I will draw on and as Nicolini (2011) and Spaargaren et al (2016) note, it is useful to take into account the different formulations in empirical study. However, for this specific study, and perhaps this is reflective of my professional background as a social worker and interest in people, this theoretical perspective is lacking the recognition of the emotions connected to practices and what Schatzki (2010) describes as the "teleo-affective structures" which also form part of the organisation of practices.

As discussed in Chapter Two, charities as organisations are particularly value driven, they have aims and goals which are about helping people, care and support, and these values and aims are driven and directed by normative values of what it is to care and support people. Inevitably, as practices are performed with these aims driving them, emotions play a significant role, and in my opinion, they cannot be ignored. Practices, particularly in the context of an organisation are collective and therefore require collectively shared links to hold them together. For this reason, I have been drawn to the work of Schatzki (1996, 2002, 2016). His description of the elements of social practices is slightly more detailed, he states that 'practices consist of doings and sayings and material arrangements' which come together and are organised by, 'practical understanding, general understanding' and 'teleoaffective structures' (Spaargaren, et al, 2016:7).

*Practical understandings* are knowing what and how to do something and are at the centre of every practice (Cox, 2012). It is the visceral and ingrained ways of knowing how to accomplish something, there and then, in the middle of the action. For

example, when giving advice, it would be the practical understanding of how to listen to a person who needs help, perhaps taking notes of what they say, knowing where to look or search for information to help them and knowing how to behave, to communicate effectively, to reassure the person they have done the right thing, and to pass on relevant information. Practical understandings are skills. In this example, the advice provider might have learned about where to search for relevant advice and how to communicate in an effective way with people in distress. However, it is also about an understanding of social expectations of being asked and then giving advice, for example the ingrained, social understanding of the importance of listening and then responding with suggestions when someone asks for help.

The next concept in Schatzki's theory which I shall discuss, is *general understandings*. Whereas practical understandings are specific to individual practices, *general understandings* are common to an array of practices and they frame how they are performed (Welch and Yates, 2018). They are the projections we afford to practices, they are what we think, feel even dream about what a set of doings and sayings involves (Weenink and Spaargaren, 2016). These projections bring together the different activities of participants involved in a shared practice, they make them coherent and give participants a shared sense of what they are doing and what they can expect to happen. As a term it encompasses things such as collective concepts, for example, "nation", or "organisation" and also membership categories such as ethnicity or political or professional identities. In my opinion, this is a key component of Schatzki's theory which is relevant to my study, because as Welch and Yates note, general understandings can play a key role 'in the ideational and affective integration of practices in processes of group formation, identification and reproduction, through identities, values and organising concepts' (2018:5). All of which directly relates to the study of organisational sustainability, how charities come into being, and how their identity, which is informed by their values and aims has developed and therefore how they survive. This is a concept that bridges and connects all three of the theories employed in this research. In a practice context, it enables exploration and analyse of how a charity's practices are informed and affected by the general understandings associated with charities and the people who connect with them.

General understandings link to Schatzki's final element of *teleoaffective structures*. A practitioner's general understandings which underpin a practice informs the ordering of the teleoaffective structures, in that they help to organise the outcome which they hope to, or do pursue. It also informs their orientations and their engagement as an individual in that practice (Welch and Yates, 2018). This makes them observable and reportable in a analytic sense for the researcher. Schatzki states that teleoaffective structures link the doings and sayings of practices through a 'range of normativized and hierarchically ordered ends, projects and tasks, to varying degrees allied with normativized emotions and even moods" (2002: 80). There are patterns of shared expectations of the outcome of practices that are recognisable to participants. These could be conceived of as being either compelling in a positive sense, and lead to enthusiasm for the practice, or coercive if they arouse fear. For example, if the practice is not enacted there could be negative consequences for the practitioner, which prompts them to engage in it. As Nicolini notes, teleoaffective structures comprise of both 'direction and oughtness' (2012:166). They direct the aim practitioners should be pursuing and how the tasks should be executed, but also evoke the emotions which accompany the enactment of the practice.

An example of this relating to charities is the teleoaffective structure of helping people. The goal of solving, or at least going some way to improve issues and problems which affect those who come to their charity for help. Those who enact support practices within a charity draw on the norms of what it is to help someone, for example, to listen to their issue, to be kind, to offer practical resources, and then use those normative understandings to inform and hold the 'helping' practices together. In this way the teleoaffective goal of helping links the sayings and doings, the practices, together but also at the same time the practices themselves contribute to the construction and development of that teleoaffective structure. By engaging in a set of helping practices, the goals and expectations might change and develop, particularly in relation to the emotions and moods experienced when engaging in that practice. For example, if someone comes to the charity for support and presents with an issue which the helper (i.e. the practitioner) has themselves experienced, their heightened emotions and empathetic sensibility could affect how they respond and could change and develop their helping practices. It could lead to developed, more

innovative practices.  Similarly, if someone seeking help does not respond in the way that is to be expected (they do and say ingratitude) this will influence the helper's response, perhaps leading them to question their approach or their utility in the organisation.

This leads to another concept defined by Schatzki (2010), which explains why someone has the sense or urge to engage in a practice, and what animates and informs that person's actions, which is *practical intelligibility* (Gram-Hanssen, 2009). It is 'what makes sense to a person to do" (Schatzki, 2002:75). Schatzki makes a distinction between practical intelligibility and rationality, because it 'can diverge' from rationality. Equally he acknowledges a difference between it and normativity stating that 'what makes sense for someone to do is not the same as or what is or what seems to be to the actor to be, appropriate, right or correct' (Schatzki, 2002:75). Nicolini offers a good example to illustrate this concept, which is Smoking (2012). Practical intelligibility primarily consists of the features ascribed to and possessed by individuals, such as their goals, that are recognisable to others (O'Keefe et al, 2015).

Thus, general and practical understandings and teleoaffective structures, underpinned by practical intelligibility, provides a useful theoretical structure to analyse and understand how practices within the charities contribute, if at all, to their survival dynamic. They will enable me to explore what people actually do when engaging with the charities, to observe and write about the routines, actions and behaviours and how these come together in bundles of interconnected practices. Furthermore, how these practices (dispersed and integrated) affect how social activity occurs in the specific places at the time they are observed (Reckwitz 2002).

**Concluding Remarks**

This chapter has provided an insight into of the theoretical choices I have made in this study. Inspired by the work of Cory (2010), I have offered an overview of the literature I have engaged with, which has informed the theoretical decisions that have guided both my data collection and analysis. I have adopted what Cory describes a processual, epistemological approach, which frames the charities as a social process and recognises and embraces that they are dynamic and fluid

phenomena, where structures, organisation and identities combine. This approach enables exploration of what communicative, practical and organisational forms are present, which enable a charity to form, function and, critically for this particular study, how they sustain their operations within a challenging sector.

Drawing on literature from organisational studies, I acknowledge the link between organisational life cycles, survival and identity (Van Tonder and Lessing 2003 and Abatecola, 2013), which led to a discussion of Organisational Identity Theory. Organisational identity formation is inevitably affected by the environment (Hatch and Schultz, 1997). The political, social and economic landscape in which charities operate, effects their decisions in relation to their identity and how they communicate what they perceive to be their central, distinctive and enduring features (Albert and Whetton 1985). The environment also impacts on their ability to acquire and mobilise resources, which led to my second theoretical lens, which is Resource Mobilization Theory.

Although this theory has been predominantly used to explore social movement organisations, more recent developments of the theory have been used to study more professionalised social movement organisations, which share similarities with the charities in this study. For example, they both use a combination of paid and voluntary staff and they are value driven. Within the chapter, I discussed this theory's relevance when exploring third sector organisations, particularly its focus on resource inequality, over time and space and how this relates to identity, which, as I go on to show in later chapters, in turn affects survival. These theoretical lenses provide a means to explore survival, firstly by enabling understanding of a charity's identity (who they are and what they believe in) and how this contributes to their formation, and secondly what resources they have and how they access new resources.

The final section of this chapter recognises a need to explore what it is the charities actually do on a daily basis, what are the routinised actions and behaviours, the sayings and doings that enable the organisations to achieve their goals (or at least go some way to achieve them). To consider how, elements or features of practice

translate into successful aggregation of resources, and what they reveal about how charities adapt and survive in a challenging environment.

Drawing on three separate theories may seem unnecessary in a study of this size and indeed I did experience challenges when trying to read about each, in depth, however, I recognised that all three provided different lenses to analyse the data and provided opportunity to gain insights into the different elements of organisational sustainability. Individually, each could provide a way to explore how a charity could survive, but each also had limitations. To use just one, did not feel adequate when answering the research questions.

Organisational Identity Theory was important when considering how charities formed and how those connected to an organisation feel and think about it. It enabled me to understand how an organisation responds to a need in the community and how it articulates organisational aims and mission, to inspire those who are deemed to be inside the organisation and also to those external to it, who may provide valuable resources. However, I recognised that exploring identity can be predominantly internally focused, and although organisations do articulate their identity to external stakeholders, it does not provide an opportunity to explore some of the external factors of sustainability. For example, it is difficult to explore why some organisations with very strong and enduring identities survive, despite resource inequality, especially when it is recognised that organisational identity is shaped by the external environment in which it operates (Hatch and Schultz, 1997). As evidenced in the literature (Gras and Mendoza-Abarca, 2013), it was clear that identity can act as a mechanism to mobilise resources, but I also felt that a further exploration of how resources are acquired and distributed, was key to understanding how organisations survive, especially in a challenging political and economic climate, hence the addition of Resource Mobilisation Theory to my theoretical perspective.

Resource Mobilisation Theory, provided a lens to explore how resources relate to sustainability and how structural and societal issues affect resource distribution. I recognised that using this theory could enable me to explore how organisation's acquire resources, which are essential to sustainibility, but how they translate them to action and use them in practice was different. I was mindful of organisations who

have access to resources, perhaps by virtue of being deemed a worthy charity in society, but still fail because they are unable to use those resources effectively. Resource Mobilisation Theory could shed light on how structure and agency affect resource mobilisation, but Practice Theory, which takes a flattened ontological approach, focuses on what happens in an organisation, the day to day ‘doings’ of a charity and how these practices endure and adapt over time. Social practices are key to both identity formation and development and resource mobilisation. All three elements, are key when exploring sustainability, over time.

# Chapter Four - The Story of Stories

## Introduction

It is recognised both in literature and in practice, that charities can find it difficult to successfully and consistently articulate the value of their work (Harlock, 2014). Through discussions with the organisations involved in this research project, and from attending national workshops and symposiums, I am aware that many charities have developed or employed tools and procedures for collecting quantitative data to demonstrate the impact of their projects and to help them secure more resources, particularly funding. As Soteri-Proctor (2010) and Metcalf, (2013) both note, third sector research and evaluation in the UK is d
ominated by quantitative approaches. Whilst these tools can generate compelling evidence on things such as return on investment, or the number of people who have accessed services, it does not tell the whole story of how some charities are able to consistently mobilise resources effectively, deliver interventions for people in need and crucially, why some charities retain their value when others fail to do so.

In response to this dominance of a focus on what could be counted and the pressure to adopt quantitative approaches, there is a need to look at different ways to explore how some charities sustain their operations. Numbers relating to funding and scope can be useful, but during this process I was aware of charities that had secured significant amounts of funding, therefore on paper appeared stable, and yet were unable to survive. A very high-profile example of this is Kids Company, a charity who received millions in material resources from central government and yet closed in 2015. Perhaps the explanation for sustainability resided in something deeper, which might be made explicit through a more detailed examination of less quantifiable elements; the human interactions and experiences, the stories that people who connect to those charities told. A charity is more than its quantifiable impacts. Employees, volunteers and their physical space, their practices and artefacts all contribute to an ability to access resources and maintain their services. This led me down a path of exploring different qualitative approaches. I attended seminars and workshops on different methods, read numerous methodology books and looked to the research of others to inspire and offer exemplars. I wanted to identify what types of research would best enable adequate representation and analysis of these

apparently less tangible unquantifiable elements that had hitherto been under-researched.

The methodology which I was drawn to was narrative inquiry and particularly the work of Riessman, (2008), Andrews et al, (2008) and Clandinin and Connelly (2000). This chapter therefore introduces and reviews the literature and theory relating to narrative inquiry, which became the primary methodology in this study. It will detail why I chose it as an effective method to answer my research questions and why as a social worker, this approach appeals to both my research interests and the values of my professional practice. I propose that narrative inquiry is useful and relevant in researching charities as organisations, whilst also highlighting what might be considered to be its inherent methodological limitations. One such was finding a place for the visual in narrative. This led to consideration of the use of visual methods, specifically visual documentation and the use of photographs to produce and represent knowledge. Whilst out in the field and in response to the iterative process which is data collection and analysis, I noticed that images (photographs, advertising, art) were an important part of a charity's narrative and considered that they may have relevance to my research questions.

**Why Narrative Inquiry**

Narrative inquiry is located in the interpretive paradigm and is a distinct form of qualitative research. It focuses on people and their stories. The researcher invites the research participant, usually within the context of an interview, to share their stories about particular events or phenomena, with a hope that they will offer a window into their world and their experiences. Denzin states that a story;

> *tells of events that are significant for the narrator and his or her audience. A narrative as a story has a plot, a beginning, a middle, and an end. It has internal logic that makes sense to the narrator. A narrative relates events in a temporal, causal sequence. Every narrative describes a sequence of events that has happened. Hence narratives are temporal productions (1989:37).*

As this quote suggests, central to narratives are two defining elements. The first is an internal structure where the sequence of events are arranged in a temporal order.

The second is thematic organisation, which is the aspect of the narrative which is evaluative and conveys the meaning that the story teller attaches to the event or experience (Glover, 2004). As Schwandt (2001) recognises, stories are diachronic, in the sense that they are concerned with a phenomenon as it changes over time. They are a means by which the narrator can try to gain personal clarification of an event or experience, to unravel an incomplete situation and attempt to order its meaning, in the quest to find a possible solution (Polkinghorn, 1995). The researcher, through close reading and analysis of that narrative, thereby draws meaning and knowledge from what is said or written, and significantly, from how it is presented.

Elements such as time, tempo, pace and duration provide a means of thematic organisation of the story (Maines and Bridger, 1992). The narrator may use rhetorical devices, such as coincidences, surprises or embellishments, as a means to draw the listener in and maintain their attention. These features pertain to the performative element of stories, which a number of narrative scholars (Riessman, 2008, Andrews, 2004 and Glover, 2004) relate to Goffman's work and specifically his book, *Presentation of the Self in Everyday Life* (1959). It recognises that narrators are consistently composing impressions of themselves, a presentation of who they are at any particular point in time, and making claims about themselves, the world and those who they share that world with (Riessman, 2008). As Goffman puts it;

> *'What talkers undertake to do is not to provide information to a recipient but to present dramas to an audience. Indeed, it seems that we spend more time not engaged in giving information but in giving shows' (Goffman, 1974:508).*

That is not to say that the projected identity and story of the narrator is not authentic, but that it is positioned and achieved with the listener, or audience, in mind at a given point in time. The listener is not passive in the process, but an active presence. An example of how this could occur in a research interview context could be if a funny story is offered as a means to release tension, or a poignant life story may be told to create a sense of intimacy (Mankowski and Rappaport, 2000). Whatever the purpose, it requires both parties to engage if it is to be successful.

The relational element and this focus on the person and their experiences has relevance for research into charities, as organisations that at the very least are comprised of the doings and sayings of people. Narrative inquiry focuses on experiences and how physical, social and cultural environments have an impact on, and indeed frame, personal experiences (Haydon et al, 2018). The relational element of narrative inquiry enables both the researcher and the participant to form a connection, which creates an opportunity for a deeper understanding of the phenomena under investigation; in this case the charities and how they operate (Haydon el al, 2018). Kim recognises that 'telling stories is the primary way we express what we know and who we are' and as someone tells a story, they allow it to move from one person to another, which lets its meaning become 'more than the individual experience or the individual life' (2016:9).

Wang and Geale suggest that narratives can make the 'implicit explicit, the hidden seen, the unformed formed, and the confusing clear' (2015: 195) and this is exactly what I am hoping to achieve in this study. To focus on the human, relational aspects of the charities, the tacit and experiential knowledge that is difficult to quantify, but which may be central to their organizational identities, their ability to mobilise resources effectively, their practices and their ability to survive.

A charity's formal documents, such as reports and social media sites, offer a particular type of data which has also been useful to this study, especially when exploring organisational identity. However, it is inevitably more mediated, refined and managed and offers a particular type of information. Searching for different layers of meaning, I also want to endeavour to make sense of the human interactions, of the people who feature in those reports and to explore their innate, ambiguous nature through their stories and what they tell me about the charities they connect with (Shaw and Holland, 2014).

**My Connection with Narratives**

This provides an insight into my intellectual reasons for choosing this methodology and how it could be effective in answering my research questions. However, it is important to make explicit that personal experiences inevitably influence methodological choices (Creswell, 2014). I recognise that this method appealed to

me on a different level, which reflected my long-standing interest and curiosity in people and their lives. When reviewing and reflecting on the literature relating to the use of narratives in academic research, it was clear that the approach and some of its key principles are compatible with my own values and interests as a researcher, but also to me as a social worker, and someone who is committed to social justice and equality. One aspect I was particularly drawn to is the commitment within this method to situate the person telling their story at the centre of the research; their voice matters (Du Bois and Wright, 2002). Value is placed on endeavouring to understand the experiences and the meaning of behaviour from the perspective of the narrator, whatever their position is within a given context (Kim, 2016). In the context of austerity and increasing marketisation of charities, the appeal of this method is that it encourages the voices of all those involved in charities to be prioritised and championed, as valid stakeholders, alongside those of managers, funders and commissioners.

**Narratives and Charities**

The use of narratives is not novel within the charitable sector. I have observed that a format employed by charities is to use service users' narratives as publicity. Short excerpts of people's stories appear in impact reports, often under the title of "success story" (or similar) with a picture of the per

son to emphasis the point and draw the reader in. These are usually very brief; they are simply reproduced, and are predominantly used to provide positive feedback on a project. What is useful about these types of narratives for this study is that they will show what stories the charity would like people to hear. They provide an insight into what those creating reports and publicity for the organisation thinks is important to articulate to the public and alsoa useful comparison to the everyday narratives collected in this study.

Stories provide an opportunity to see different, and at times contradictory, layers of meaning. Those meanings can be brought into useful dialogue with each other, as a way to understand more about individuals, but also about social change (Andrews et al, 2008). By collecting stories from a number of people, multiple voices and narratives can lead to the emergence of a collective story (Shaw and Holland, 2014),

which when analysed can be used to gain understanding of a phenomena and inform practice.

Some charities use questionnaires as a way to review and collect qualitative evidence and data for reports and this does provide an alternative to the more dominant quantitative approaches. For this study, I felt questionnaires would be an insufficient method in my desire to gain a deeper, more nuanced understanding of the charity's identities and practices and how they mobilise resources effectively. Whilst the qualitative questionnaire might be considered a more rigorous approach, I would argue that this method (although of practical use for the charities in their report writing), could constrain or overly narrow the range of participants' views and responses. In an interview situation people are more likely to elaborate and if not, they can be prompted by the researcher.

Riessman suggests that the goal in narrative interviewing is different to what she describes as 'mainstream social science interviewing practice', which tends to rely on closed questions or discreet open questions, whereas narrative interviews invite detailed rich accounts rather than short answers or generalised statements (2008: 23). Mishler argues in response to empirical studies of conventional research interviews that;

> *'the standard approach to interviewing is demonstrably inappropriate for and inadequate to the study of the central questions in the social and behavioural sciences, namely how individuals perceive, organize, give meaning to, and express their understandings of themselves, their experiences, and their worlds'* (1986: ix).

Whilst this is a very particular view on other forms of interviewing and it is important to note this text is a response to interview practices from over thirty years ago, his belief that more traditional approaches do not thoroughly explore how people's understandings relate to their social, cultural and personal circumstances retains validity. Charities, hard pressed for time and funding may more often resort to such methods. I will propose in my final chapter that alternative approaches can be developed within reports, but from a different perspective. Hearing people's stories

allows for the explanation of the nature of social practices, values and relationships and seeks to make clear the meaning of human experiences (Lietz and Zayas, 2010). I was particularly interested in the connection between narratives and values. Values are so intrinsic to charities, to their identities and how they distinguish themselves from other types of organisations (discussed in more detail in Chapter Six). Therefore narratives, which provide longer, more detailed responses, would enable me to elicit data that had the potential to reveal how people's values relate to the organisation with which they connect.

This is a key aspiration of this research, which seeks to move beyond the anecdotal excerpts currently used in the charitable sector (which are most likely modified and became data in the present project through their use as marketing tools and illustrations in funding reports). My methodological aim is to ensure that stories are collected from a cross section of people connected to a charity and transcribed as a verbatim reflection of what the narrators have said, in a rigorous and consistent process. I anticipate this will enable me to look within and across the texts for meaning, with a view to producing knowledge on the sustainability of these organisations.

**Co-production of Narratives**

The question of whether stories offered by research participants are representing internal and individual experiences or external social structures is a dichotomy which exists for those interested in narrative inquiry. It prompts the need for awareness of how, when and where narratives are constructed and, more specifically, how narratives are shaped and effected by 'the audiences to whom they are delivered' and to what extent (Andrews et al, 2008: 5). Narrative interviews are relational and have performative elements, they are co-productions with an audience, whether that audience is present or the imagined future audience (Chase, 2005, Cortazzi, 2001).

Therefore, inevitably, the presence of a listener will affect how a narrative is constructed. Indeed, many scholars suggest that it is not just the fact that there is an audience, but the identity of that audience is important in the construction and the analysis of narratives (Gubruim and Holstein, 1998, Riessman, 2008, Hollway and Jefferson, 2000). As Gubruim and Holstein state, 'Listeners are not simply narrative

depositories or passive receptors. Neither are they discursively homogenous' (1998:170). This element of narrative inquiry is another aspect which interests me and appeals to my experience of being a social worker and my affiliation with relationship-based practice.

Unlike quantitative research where the researcher should be clinical, objective and distant from the subject or research participant, the qualitative researcher is involved and even co-creates the knowledge produced within the context of social interactions (Connolly and Reilly, 2007). As Riessman states, 'Stories don't fall from the sky (or emerge from the innermost "self"'(2008:105), they are composed, presented and heard in a specific interactional or institutional context. She also describes how they are co-produced in a 'complex choreography' in spaces between the research participant and researcher, the research participant and the setting, between the text and the reader (2008:105). The notion that a research interview could be a complex choreography of interaction certainly 'sealed the deal' in terms of methodological choice. I love to dance!

Being engaged in a research practice which is not pre-determined, that embraces spontaneity, and which is responsive and interactive to another person evokes memories from some of my most exciting and interesting times in social work practice. Working directly with service users (as they were described within the Local Authority), often no amount of planning could determine an outcome. Interpersonal skills were required which went beyond my professional identity and training and where the focus was on the relationship between two people and what qualities, values and mood were brought to that interaction. As Pinnegar and Daynes (2007) describe in relation to narrative inquiry, both the researched and researcher bring a history and their personal world view to the process. Within that, neither is static but dynamic in the situation, and learning and growth are intrinsic to the process.

Narrative inquiry is discussed in detail in the work of Holloway and Jefferson (2000), who suggest applying a psycho-social understanding of subjectivity when engaging in qualitative research methods. It is a practice which involves conceptualising researcher and researched as co-producers of meanings; narrative accounts are 'elicited in the particular context of the interview relationship' and accounts offered

are a ‘function of the intersubjective conditions of the moment’ (2000: 151). They, and also Riessman (2008), consider the interplay that occurs when telling a story, between narrative, time and memory, suggesting that telling a story is not just an individual achievement or an individual’s biography, but that biography is revised and edited in relation to current identities and intersubjective dynamics, in the context in which a story is told and received.

**Validity and Narrative Inquiry**

In response to this discussion around the co-construction of narratives and the intersubjectivity associated to the process, inevitably questions could be raised in relation to the validity of this research methodology, and whether it can generate data which will be viewed as reliable. This, as an early researcher and when working in partnership with organisations and people who in practice (even if this is in conflict to their personal opinions and values), are dominated by quantitative data, was a concern for me. Which led to further reading and ironically, a quest to validate, through literature, the validity of this methodology.

Angen observes that, as researchers, there is a desire to be reassured that we have done the ‘right thing’ and ‘procured the truth’ within the data we collect, analyse and disseminate (2000:380). I empathise with this and particularly at the start of this PhD process, this is what I assumed I would do, that this was the role of a proficient researcher. However, as the project has unfolded, my knowledge and understanding of different types of research methodologies has progressed and in response to the research questions I settled upon, I have come to view the notions of truth, validity and what constitutes being important in research, differently.

It was evident that the empirical procedures to establish verification and validity which prevail in some areas of scientific knowledge production are not relevant to my study, which is concerned with social phenomena and therefore is inevitably complex, ambiguous and difficult to quantify. A quote from Kim (2016) provides a great analogy to illustrate this issue and which relates to modern technology. She suggests that to rely on scientific research to understand human phenomena, is ‘like asking Siri on my iPhone to cry for me when I get lost on the road’ (2016:4). It is very clear in literature and from my perspective as a social worker (with my practiced focused insight into the complexity of human lives), that qualitative and specifically

narrative inquiry are appropriate for this study. However, I did experience a nagging desire to establish, or at least to be able to articulate, how I can verify the data I will collect and the knowledge I hope to produce from it.

During the process of deciding on a methodological approach, I was fortunate to attend a workshop with Professor Riessman. I was able to ask her directly about the issue of validity. My understanding of her response to the questions I asked, is that there are no universal, defined rules or procedures which validate narrative enquiry projects, but that as researchers we should take responsibility for the validity of our interpretations and conclusions, by clearly documenting how we came to them, to be explicit about our enquiry methods and to consistently reflect on our practice. This was reassuring, because as a social worker, reflective practice is something I am familiar with and indeed it was central to my professional training, but I would also say is something I engage with in many aspects of my life (sometimes I suffer from over-reflection, if indeed there is such a term?).

## Visual Methods

'Images are ubiquitous in society' (Banks and Zeitlyn, 2007:15) and therefore can be usefully employed in studies of society. Photographs, as a form of visual resource, provide a complex and rich source of data (Tinkler, 2013), which can enable the researcher to make visible things which have perhaps not been previously made explicit. Whilst waiting for research participants I spent some time waiting in the charities' reception areas, or different rooms in their buildings, and I was aware that each space had a different atmosphere. I became conscious that the way the space was arranged, the colours, the artefacts in the space, where I was asked or felt I should sit, altered depending on the context. Each space had its own identity and atmosphere, which prompted a different response and slightly altered how I behaved within it. I had already decided to use resource mobilisation theory as one of my theoretical lenses, therefore I knew I would have a section on material resources, which would include an exploration of the buildings. In response to this I decided that in addition to the interviews, that I would write an auto-narrative about my experiences of the different charity spaces and found that photographs complimented the data I was collecting.

Unlike my choice to use narrative inquiry, where the reading and knowledge about the methodology was gained prior to data collection, I had to learn about visual methodology retrospectively. I found the work of Tinkler (2013) very useful in this pursuit. She documents the benefits of using photographs, many of which related and complimented my area of study. One being that researchers can produce a visual account of their place of study, easily and quickly. That images can capture the texture and feel of a space and can enable one to remember and recollect it at a later stage. And crucially, that they are excellent when exploring visual phenomena such as the appearance of buildings. Her book also explains how important it is, when employing visual methods, to be clear about two things; firstly, how one conceptualises photographs and secondly, to consider my own perception of the relationship between the image and what it portrays. In terms of the first consideration, because I was using digital photography I was not conceptualising photographs as objects, but as images. If they were printed photographs, they could be touched, held, physically passed from one person to another, which would create meaning. In this context, whilst they will be printed within the body of the thesis, they would not form their own separate objects.

In response to the second consideration, Tinkler describes how when analysing a picture, it's important to decide where you position yourself on what she describes as the 'visual reality continuum'. This will help to situate understanding of whether photographs are at one end and are simply a 'copy of the real world', which is described as the naïve realist approach, or whether a more 'complex relationship' between the two is recognised (2013:3). An anti-realist position lies at the other end of the continuum and further reading about this drew me to the conclusion that I was somewhere in the middle. This is not surprising, since both naïve realism and anti-realism are theoretical constructs that ignore the relationship between them and their dependency on each other. I recognise that images are co-produced; they are shaped by the photographer, the camera, the subject and the method of capture. It is not possible for an image to depict exactly what our eyes can see, or what the brain perceives as the image (Goldstein, 2007). Elements such as the light will be different, how colours are seen and where the photographer chooses to position the camera. Furthermore, images can only be made sense of by those who view them, by social beings, who relate what they see to their understanding of the world.

My aim in using images in this thesis, is to provide the reader with an additional version of the charities narratives as observed and taken by myself. It will enable the reader to visualise the organisational spaces and to complement the narrative data.

### Conclusion

Narrative inquiry and visual methodologies compliment the theoretical framework I have chosen. These particular qualitative approaches are appropriate to tackling the 'task in hand' of identifying how charities survive collecting data on organisational identities, resources and practices. It provides a means to not only learn about the structural factors, but also the co-produced perspectives of those involved. It enables me to explore actions and tacit knowledge that are generated through stories of experience in these organisations. I end this chapter with a quote, which resonated with me, from the late actor Alan Rickman;

> *"And it's a human need to be told stories. The more we're governed by idiots and have no control over our destinies, the more we need to tell stories to each other about who we are, why we are, where we come from, and what might be possible."*

## Chapter Five - Methodological Process

### Introduction

I begin this chapter by drawing on the work of Silverman, who states that '…readers will be more interested in a methodological discussion in which you explain the

actual course of your decision making, rather than a series of blunt assertions in the passive voice...' (2010:334). Inspired by this and reflecting my interest and affinity with a narrative approach, I will offer an account of the methodological process, which will make explicit the decisions I have made, the challenges I have faced and the methodological journey of this study.

Broadly, drawing on the work of Holliday (2007), the chapter is divided into four sections:

- ***The Setting*** *– identifying appropriate charities and agreeing their participation*
- ***The Participants*** *– sampling decisions, ethical approval, recruitment within charities and consent*
- ***The Data*** *– the practicalities of engaging in narrative interviews, transcribing interview data and the collection of visual data (photographs)*
- ***The Analysis –*** *the use of data software, thematic analysis, close listening, dialogic/performance analysis and visual image analysis.*

## The Setting

### Identifying and gaining agreement of participating charities

A number of authors have recognised that gaining access in the research field can be one of the greatest problems when conducting research and that it can be time consuming (Kaur Johl and Renganathan, 2013). Whilst I concur with the time element of that statement, thankfully I was very fortunate to have no significant issues around access. This project from its conception, was developed in collaboration with a charitable organisation as an ESRC CASE studentship. Therefore, from the beginning of the process, I had the opportunity to work in partnership with a charity and due to the positive relationship fostered, I was able to immerse myself within the field of study. As Ebrahim and Sullivan (1995) recognise, an important, or one could argue fundamental aspect of engaging in qualitative research, is to ensure the investigator is positioned close to the subjects in order to gain access to them.

In the first year of my research I worked at positioning myself “close to the subject”, in this case the partnership organisation, by attending meetings with staff, reading reports and funding applications and meeting some of the people who connect with

their service. In addition, the positive relationship with the CASE partner led to me being able to access not only their organisation, but a network of others, which at the time were affiliated to them through a specific project. The aim of that project was to bring together advice and support agencies from the local district, as a means to improve charitable services and to adopt a partnership approach for funding and service provision for local charities. Unfortunately, just under a year into my PhD, this project was no longer funded and whilst some elements of the project remained, from my perspective the key component was lost, which was the employment of the project manager. He played a significant role in integrating me into the sector, but crucially, before he left he ensured that I was introduced to managers from other charities in the network, and for this, I shall always be grateful.

This became an important aspect of gaining access to research participants. In order to collect data, gaining access to participants often involves communicating and going through 'gatekeepers' and even through a 'hierarchy of gatekeepers' (Nind, 2008:9). This resonates with my experience. I had to follow a process of being first introduced to the person the project manager had the best relationship with and then, if they were not the most senior member of staff in that organisation, I had to then be introduced and meet whoever was the most senior. This involved a series of meetings, in which I informally presented my work, with a view to recruiting charities to take part in the research. I also presented at a networking meeting for local charities, where I spoke about my project, its aim and my hope to recruit local research participants. This led to one charity agreeing to take part. I was conscious that I had access to this meeting due to the relationship with the CASE partner organisation and by taking this network approach.

The original ESRC CASE partner charity is affiliated to a large national organisation and its sustainability strategy might therefore have differed to smaller more locally-based organisations. Also, my interest was in establishing how different kinds of charities survive in a mixed economy of welfare and in the continued context of austerity. What did they offer over and above, or differently from, statutory and private organisations and how important was distinctiveness to their sustainability? Thus, I aimed to recruit at least three charities with differing aims and organisational working practices to enable a comparative dimension.

I decided to go beyond the network associated with the CASE partner organisation, particularly after my key contact had left and the project no longer existed in the same way. I then had to rely on my own experience and contacts, as someone who lives and has volunteered in the community and locality I am researching. The work of Rowberry is interesting in relation to this, because she recognises in her research, that, 'without joining the community in question it is unlikely that I would have become a researcher. However, without the research it is unlikely that I would have become so embroiled in the community' (2015:37).

I can identify with this, because the community in my project is the local charitable sector, something I have been involved in through voluntary work for many years. Indeed, one of the charities that I have recruited, is one which I volunteered for over five years ago. I am certain that my experience of this and the knowledge gained, has led to me applying and feeling able to undertake this project. Similarly, and in relation to the second part of Rowberry's quote, I know that by embarking on this research and consequently becoming more and more interested and knowledgeable in the role of charities in my community, I have increased my involvement by becoming a trustee for a different charity, not involved in the present study. This statement from Law (1994:37) in my opinion, beautifully encapsulates my feelings and experience about this element of the research process, 'It's [about] what you have, what you know and whom you know'.

## The Participants

### Sample Size

Deciding on sample size for research with the charities under study was difficult. It is an issue regularly discussed in the qualitative research literature. A definitive or unambiguous guide to sample size does not exist in the qualitative research community (Bryman, 2012). Given the lack of consensus around this, it felt most appropriate to be guided by two influential factors. The first being experienced scholars; my supervisors, whose expertise and guidance are central to my decision-making in this process; and also Professor Riessman, who as documented earlier I was fortunate to learn from and be inspired by, at a workshop. Secondly, I turned to

theoretical literature on Narrative Inquiry to substantiate my decision, as I will detail in the next section.

Professor Riessman stated that in her opinion and experience, ‘less is more’ when it comes to narrative analysis and that in order to analyse narratives in detail, sample sizes should be small. My supervisors prompted me to be mindful of ensuring that my work was not too narrow and demonstrated that I was drawing on enough data to answer my research questions and that my sample size would not restrict me in the future, for example, from disseminating my work. The literature I read, particularly the work of Kim (2016) also discussed the connection between the research question and sample, warning that researchers should be flexible and realistic when deciding on size, particularly in PhD study. In response to all of this, it was agreed in a supervision session that I would aim to undertake 30 narrative interviews, ideally 10 from each charity.

In order to ensure that I was capturing the voices of a cross section of people involved and gaining a fully rounded picture of charitable work, I decided to break this number down, further. Within the three charities recruited, consideration was given to the number of participants who would be charity employees or volunteers (which I will describe as workers) and those people who were connected to the charities for help (connectors). This breakdown would facilitate comparison between the different positions. It also enabled me to explore how both groups articulate their involvement with the charities and whether there is consistency between what the ‘workers’ and what the ‘connectors’ say about the work of charities, particularly in relation to the organisational identities, resources and practices.

**Ethical Approval**

It is proposed (Butler, 2002) that social work research and practice ‘occupy the same territory’ in relation to their ‘subjects, fields of interest and audience’ and therefore the ethics of social work research should be compatible with the more general ethics of the profession (Shaw and Holland, 2014: 103). Whilst ethical approval for this project followed the university’s general procedure and not one specific to social work research, I could recognise that there were many compatible elements to the process which mirrored procedures that I encountered as a social worker. For example, procedures for consent, confidentiality and data protection. Perhaps for this

reason, no significant issues were encountered in acquiring ethical approval for this project.

Clarification was sought by the ethics panel about how I would respond should a research participant require additional support during or after taking part in a narrative interview and about my safety whilst conducting the interviews. Due to the partnership approach to this project, the fact that interviews would be conducted at the charities and my professional qualification and practice experience as a social worker, it was deemed following a panel meeting I attended that these concerns were addressed as part of the ethics documentation (please see Appendix A).

**Recruitment within Charities**

Ethical approval being granted meant that I could concentrate on recruiting participants and start to engage in data collection. Recruitment requires the researcher to identify, target and enlist participants and involves providing information to potential participants and generating interest in the project (Dickson-Swift, et al, 2007). I went about this in two different ways, which related to how the organisations operate and the way they interact with those who connect with them.

The first involved becoming even more immersed in the field, by taking part in fundraising and social events and speaking directly with people who connect with a charity. This proved to be a very enjoyable way to recruit participants and not only provided me with the opportunity to tell people about the research, but also enlist them in an informal way. It allowed me to begin to observe the relationships formed within organisations between the workers and the connectors and between connectors themselves. Incidentally, but probably not linked to my enjoyment in this approach, tea and cake were often offered at these events. The second was more formal and involved me presenting at meetings to either staff or trustee boards, with a remit to identify and recruit workers, but also to urge workers to act as ‘gate keepers’ and approach connecters on my behalf. This meant that I had to be very precise in articulating the project and to negotiate the most appropriate way for potential participants to contact me. In the case of the workers, this was simply achieved via email, but with connectors, initial contact varied depending on the

advice and expertise of the workers and their practice knowledge of that particular connector.

Underpinning both methods of recruitment was initially a convenience sampling approach, meaning that mostly it was the first available data source being used.  in some of the charities a snowballing sampling approach emerged. This is where a link exists between one of the initial research participants and others in the target group; participants draw on their social networks within the organisation to help find other participants (Berg, 1988). This first happened at one of the charities, where having interviewed one of the connectors, she then introduced me to others who were part of a group she attended at the charity. It then became a very efficient way for me to recruit participants, with limited effort (Cohen and Arieli, 2011). Given the small nature of the organisations I was studying, it was inevitable that a certain amount of 'snowballing' would occur. People were interested to know who the new person was at the charity, they were inquisitive and on hearing about the project they offered to be interviewed. This reflects the importance of relationships in these organisations, which is discussed in more detail in subsequent chapters.

**Consent**

In accordance with the British Sociological Association's statement of Ethical Practice (2002), all participants recruited have freely given informed consent to take part in the project. I provided participation information sheets, which detail who I am, which institution I am affiliated to, the aims of the project, what participation will involve and how the information gained will be used in the future (see Appendix A). These also clearly state that participants could remove themselves from the research process at any point (no participants did ask to be removed). I provided a consent form which outlines exactly what was being agreed to and this was signed before any interviews commenced. I have taken seriously my responsibility to explain, in an appropriate manner, the process of the research and how I intend to collect, store and disseminate the data I produce, and I have discussed in detail that all the data will remain personally anonymous (pseudonyms have been given to each research participant) and be stored securely. Having decided during the data collection process that I would like to take photographs as part of the study, I had to ensure that each organisation gave additional consent for this.

## The Data

### Narrative Interviews

A quote from Kim's work, guided my preparation for the narrative interviews. She states that, 'although narrative interviewing requires us to give up control and follow the interviewee's leads, it does not mean that we should enter our interview empty-headed' (2016:166). In reality, I was far from empty headed when I began the interview process, indeed my head was swimming with anxious thoughts about the practicalities of leading interviews, such as the reliability of the recording instrument, whether I had all the correct forms and so forth. My head was full of prepared questions and trying to remember information about the person with a view to creating a less formal, 'chatty' atmosphere. When I reflected on why I was anxious, the issue of control felt significant. The process of research, when not in the field, is something which one can control and is particularly self-directed, but as Riessman notes, in order to create possibilities in interviews for 'extended narration' the investigator is required to 'give up control, which can generate anxiety' (2008:24).

Prior to the interviews I had to ensure that I prepared some questions to generate the narrative data I required. I wanted to have some structure, or at least opening questions, but also to recognise that flexibility is important if required to respond to surprises in the direction of the interview. The work of Morrissey (1987:46) was useful in interview development. He suggests a two-sentence format to interview questions, where a question consists of a statement and a question. For example:

> *Knowing as we do that you have been supported by {charity name}. Would you tell the story of how you became involved with {charity name}?*

The statement 'predicates the question in the next sentence'. This format of question enables the interviewer to involve the interviewee, incorporates two good interview qualities of rapport and collaboration and contributes to the relationship. Interviews were audio recorded, which was agreed with the participant as part of the recruitment process. Using a small recording device and choosing not to video record interviews was an important methodological decision, with the intention to create a less formal and more natural atmosphere for stories to flow. A general

observation of the interviews is that initially the research participants were conscious of the recording device, and indeed one chose to lean forward a little to talk towards it, however, within a couple of minutes participants relaxed into the conversation.

Interviews took place in the buildings of the charities. Usually this was in a private space, such as a meeting room, however at Home-Start, due to the open nature of their office building this was often at the end of a room with others in it. I was aware that this could impact on confidentiality or people's ability to talk freely about their experiences. However, I discovered that this did not present as an issue, because it is usual practice for people in that building to share the space. I was interested that as a social worker, I felt the need to prioritise confidentiality, yet the research participants at this charity, when asked about it, seemed less concerned and said that it was not an issue to them.

**Photographs**

Photographs were taken on my mobile phone and then downloaded on to NVivo (the qualitative data analysis software) and deleted from my phone.

**Transcription**

Riessman recognises that transcribing interview data is an interpretive practice, stating that, 'representing "what happened" in an interview is a fixation of action into written form' (2008:50). Mishler (1986) takes the analogy of transcribing being similar to photography, with the transcript being the photograph. The choice of lens, the style of print (digital filters would also be included in this), mean that there are numerous possibilities of how an object can appear in a photograph and similarly, how interviews can be transcribed. In this analogy, the image represents the photographer's view, conceptions and what they value and the same can be said for analysis produced from interviews, where the researcher decides which parts of an interview to focus on and pursue.

My experience of transcribing the interview recordings was that it was a time-consuming task, which at times felt like a task that might never end, however, it was a significant part of the methodological process and led to hours of informal analysis of the data. I initially adopted what Davidson (2009) describes as a denaturalising technique, where the features of oral language, such as 'erms' and 'ums' were

included. I focused on transcribing everything, including pauses and not paying attention to written features of discourse, such as punctuation. I only transcribed three interviews in this manner, and then decided to change my approach. This was because, after I transcribed each interview I spent time close reading the data. I found the denaturalised style challenging to read and it detracted from the flow of the narratives and my ability to connect with what I had transcribed. I then questioned whether my reasons for doing this were based on theory relating to my analytic method, and whether the additional details of the speech added anything to the process. I concluded that they did not, but that was mainly due to the fact that I was able to store the audio files on NVivo. This meant that I could listen to the files, to recall the tone of voice, the pauses, the atmosphere of the interview, but that I could also read the transcripts in a way which suited the analytic frame. Due to my personal circumstances, in order to transcribe all my own interviews, I often had to do them whenever and wherever I could. I recall transcribing, headphones on, at the side of football pitches while my children played football, in cafes at trampoline centres and in numerous parks. It took time, but as Bailey states and I recognise, transcribing is the 'first step into analysing the data' (2008:127)

## The Analysis

### Thematic Analysis

Finding and deciding upon the most suitable method to analyse data is complex, particularly when one tries to represent participant's narratives in a coherent and meaningful way (Hunter 2009). Inspired by a chapter in Riessman's book, *Narrative Methods for the Human Sciences*, I decided that I would take a thematic approach to analysing the narratives. As she discusses in the book, this type of approach is suited and can be applied to a range of narrative texts, such as interview data but also written documents or online content. This is appropriate for this study, because I wanted to use data from the charities websites and their annual reports, particularly when exploring how they articulate their organisational identities. Furthermore, this approach is useful when looking for meanings which go beyond the meaning for the individual telling the story, but creates opportunities to learn about social identities, group belonging and social action (Riessman, 2008).

This type of analysis focuses on the ‘told” aspects of the stories, *what* is said, rather on *how* it is told, or the relationship *to whom* the narrative is given, or the purpose of telling the story. The language used by the narrator becomes the resource for interpretation. Themes are observed following investigation of that language and influenced by the choice of theory. Important to this analysis style is keeping the “story” intact, in order to interpret it. Although determining the boundaries of that story is challenging, especially when deciding how much to use within chapters.

I decided to use the data analysis software NVivo as a tool to store and also thematically code the data. Firstly, I collated any relevant data from the charities’ websites and annual reports and uploaded them to the software, followed by the transcripts of interviews and then began coding. Drawing on my theoretical lenses, I chose three initial codes (or nodes as they are described in NVivo), which were organisational identity, resources and practice. I then broke these codes down further, for example in the resources code, I had sub codes of human and material resources. I did this for all three original codes. Although I recognised that this was a start, I still had huge chunks of data which went across all three codes and I felt that it was not a very detailed approach.

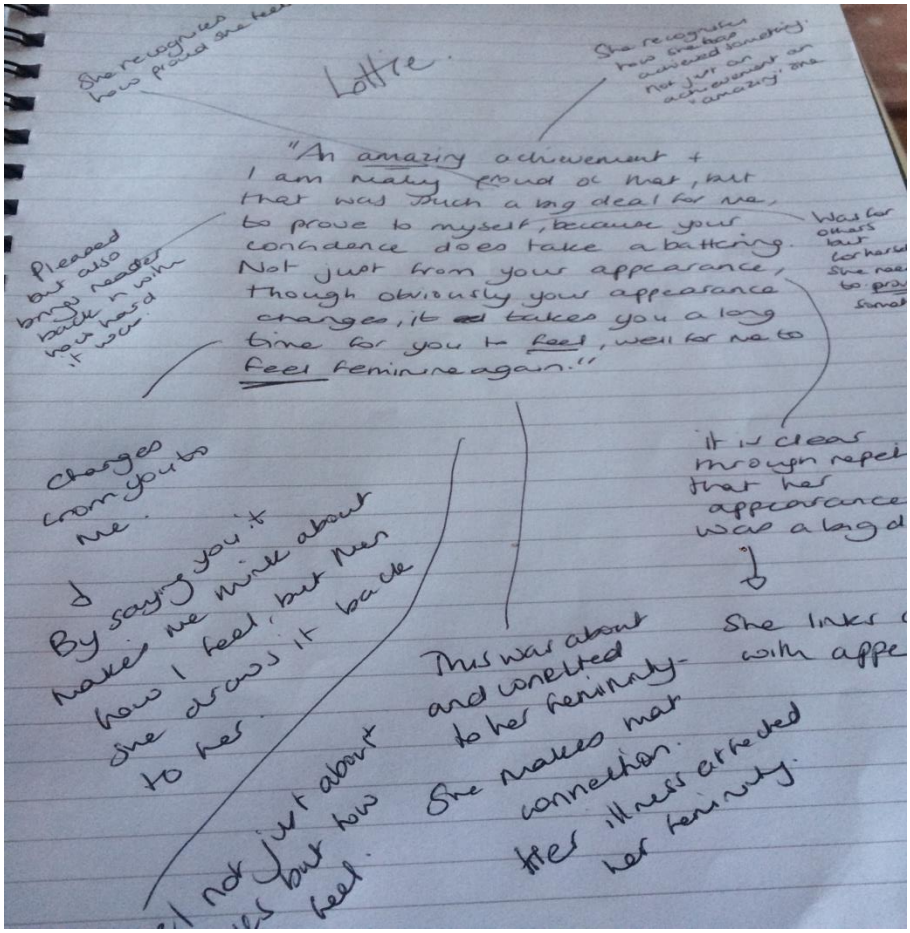
**A Disruption in the Process and Close Listening**

It was at this time that I experienced a significant disruption to my thesis process. I experienced a traumatic event, which deeply affected my mental health and subsequently meant that I found concentrating difficult and my sleep pattern was disturbed. Determined to not give up on my project, but struggling to fully engage in the process of formally analysing and writing, I decided that what I could manage at that time, was to listen to the interview data and try to immerse myself in what was said, how it was said and what that might mean. This often happened at night and allowed me to feel like I was being productive, but I did not put pressure on myself to respond in any formal way. I just listened over and over and allowed my thoughts to emerge. Whilst, I wish that I did not find myself in this situation and I recognise that it is not a conventional way of analysing data which can be neatly related to existing literature on analysis methods, I now reflect on how productive this was. It enabled me to know my data and to formulate my arguments.

When I felt able to return to a more formal process, I had gained some clarity about what I thought was important within the data and I began to add codes. I had heard in the narratives how important people's lived experiences were of social issues and how this inspired them to become more involved with the charities, that they wanted to give something back and offer peer support. Also, how significant relationships were within the organisations and that both were central to the process of mobilising human resources. I also started to recognise that the stories from the different charities had a different feel and tone to them, which reflected an identity and I was able to create some further nodes expanding the concept of organisational identity, to include themes on relationships and feelings. It also assisted in explicating themes for other nodes. For example, sub-themes within resources started to emerge such as atmospheres and comparisons to other organisational spaces, and within practices, shopping and advice. With the themes identified and returning to my three theoretical lenses, I was then able to engage in a deeper analysis of the narratives.

Having adopted technology to help me thematically code the data, I then used traditional methods (pen and paper) to complete this analysis, which had been suggested to me by Professor Riessman. Where I knew a narrative excerpt fitted with the theme that I was writing about, I would then handwrite that out. This allowed me to re connect with the text and, as I wrote the words, I could recall how they were said in my imagination because of listening to the interviews many times previously. Similar to a spider diagram, I would then draw lines out from any particular words that I interpreted as being important, or underlined sections and wrote notes about their meaning. This photograph of my notebook, illustrates how this happened in practice (Figure 5.1)

Figure 5.1




This enabled me to focus on the language and what words narrators chose to articulate their experiences of connecting with a charity. Although this meant that I had the data coded on NVivo and lots of detailed analysis on paper, I was able to combine the two. The computer programme enabled me to theme the data into different nodes, but once I chose a particular narrative to write about, I would then return to the traditional method. Perhaps not the most conventional of methods, but it was system which worked for me and perhaps reflects my desire to engage with technology, whilst also needing to engage with data as a hard copy.

**Visual Analysis**

When analysing the photographs, I was led by the work of Tinkler (2013:19). She identifies and suggests 'five lines of enquiry' to inform the analysis of images. They are:

- ***Identifying basic details*** *– What is it ostensibly of? When was it taken? By whom? Consideration of the photographic genre;*

- ***Scrutinising images –*** *Careful and repeated looking at the image, looking at the objects, the environment. The relationship between objects, the background and foreground;*
- ***Considering material evidence –*** *As objects, what is the photograph's materiality;*
- ***Doing contextual research –*** *the context in which the photograph is viewed, and the context of production;*
- ***Reflecting on meaning –*** *Content of the image (literal meaning and interpretation, institutional frameworks, photographers intended meaning).*

Whilst she writes about these as separate headings, she also recognises that in the process of analysis, they overlap and inform each other. I recognise that some elements of this are more relevant to my study than others, for example the scrutinising of images and reflecting on their meaning, much more so than the photographs as material evidence, because these are not printed or historical images.

## Conclusion

This chapter has offered a narrative account of the methodological process of this study, including information about the setting, participants, data and analysis. I have related each element of the process to the literature which has guided and underpinned my methodological decisions. I chose to present this chapter in narrative form, to acknowledge and draw attention to how the process evolved over time and space and how disruptions occurred, which were challenging and yet ultimately a useful part of the journey. I wanted to be explicit about the human element to social research, which makes it exciting, complicated, at times difficult to manage, but also, for me, what makes it an interesting and important way to learn about social phenomena.

# Chapter Six – Setting the Scene

**Introduction**

On a basic level, what unites the charities under study as organisations is that they are all constitutionally defined as charities, they operate at a local level and all have an overarching ethos to help people in their community and operate within a wider field of the third sector. Furthermore, they share a number of more specific similarities such as their use of volunteers, how they work in partnership with other agencies and that they have issue specific skills and knowledge which can de-escalate social problems, which benefits the state. I have often thought of these attributes as bricks that, when put together, form a sculpture which symbolises the particular charity and its identity within the wider field. These symbolic elements that represent the identity of the organisations, are fundamental in how they mobilise resources and the social practices associated with them and contribute to their sustainability, despite the challenging financial climate they currently operate in.

Whilst recognising such similarities, I have also been interested in the differences between them, about the detail relating to each one, their history and how they achieve their social goals and aims. To draw on the analogy further, how each sculpture can look, feel and be so different, despite being built using many of the same type of bricks. Inevitably, due to the fact that they are separate organisations with different missions, they all have different ways of externally communicating their identity, as this chapter will explore, which subsequently effects how they operate, how they interact with other agencies and importantly, how they mobilise resources and operate in practice.

This chapter sets the scene for the subsequent empirical chapters and offers an overview of the three charities explored in this study; it brings them to life as organisations, as opposed to them simply being names on a page. It will provide a richly descriptive account of the three research sites, to contextualise the subsequent analytical, empirical chapters. It will discuss why and how each

organisation functions and whether their organisational identity as publicly articulated is congruent with how they operations unfolded, as observed through my study. Organisational Identity Theory, categorises organisational features in to three categories: essential, distinct and enduring. Using this theoretic frame, I draw on a range of data, including the public information the organisations share; for example, their website content and published annual reports. Some narratives are included, but are not the focus here. It will detail how each organisation began, their position as either independent or affiliated charities and their relationship with statutory services. In simplistic terms, it will explain who the charities are, what their aims are and whether they do what they say they do. All with an aim to inform a discussion about the central, distinct and enduring features of each charity, which contributes to the wider exploration of their sustainability.

**Citizens Advice**

The first charity is part of the Citizens Advice network and is a charity which offers information and advice for people living in a city, in the North West of England. Although affiliated to the National Citizens Advice umbrella organisation, this charity is funded and managed locally and independently. At the time of data collection, it had 99 affiliated volunteers and five members of staff.

**Brief History**

The national Citizens Advice organisation has been in existence for 78 years, and as documented on their website, was originally set up by the National Council of Social Services (which was the forerunner to what is now known as the National Council of Voluntary Organisations). It was developed at a time when state welfare was being introduced, which required people to understand and navigate this new system and it was recognised by those who founded Citizens Advice, that some people would need support to understand and then access the benefits that they were entitled to. As described in an historical overview from their website;

> *'Complex new regulations and the impact of the First World War on families made the need for information and advice apparent.'*

*'The need for advice and information was high. Not only were the problems of war brought to 'Mrs B of the Bureau' but also the everyday problems which still have to be dealt with today. Bureaux stocked a variety of leaflets and explained everything from rationing and Red Cross messages to war damage relief' (The Village Citizens Advice, 2017).*

The national organisation formed as an umbrella body to instigate and enable a number of small organisations to develop, all of which were based in cities and towns across the UK, and shared the aim of offering information and advice services (Citizens Advice, 2017). The local branch, which is the subject of analysis in this thesis, was established in September 1939. Many of the original bureaus (as they were known), were borne out of previously established organisations, examples of these include the Charity Organisation Society, now the Family Action, in London and the Liverpool Personal Service Society, with many initially delivering services from community venues, such as cafes, church halls and private homes (Brasnett, 1964) (Figure 6.1)

**Figure 6.1**


From The Village Citizens Advice Bureau website, 2017

Whilst each local bureau shared the aims and principles of the national umbrella organisation, they operated and were managed at a local level and this structure remains the same today. As the national website states (Figure 6.2);

Figure 6.2

**We're a network of independent charities**

We're a network of around 300 independent local charities across England and Wales. Our services are provided by 23,000 trained volunteers and 7000 paid staff.

Each local Citizens Advice charity is a member of the national Citizens Advice charity. All together we form the Citizens Advice service.

(Citizens Advice, 2017)

The data excerpt which follows is from an interview with David, the manager of the local Citizens Advice charity, and is part of his response to being invited to "tell me about Citizens Advice". Here he demonstrates his knowledge and understanding about the origins of the charity in which he works, and how the organisation's history forms a part of how he articulates the central features of its organisational identity;

> *'Ok. So, started in…there were discussions before the Second World War about needing a sort of national organisation that could provide people with information and it was kinda very much about information. Then with the outbreak of the Second World War 1939, CAB started to sort of come into operation, so it's about keeping people informed, but was also at the same time, issues were coming up, things that people needed help and support with, like rationing, like access to money, it was at a time when many of the, if you like, the bread winners, were going, were joining up into the armed force, things were changing, women were picking up work, because they were sort of working in factories, so there's lots of stuff that was changing with society, there were, people, it was everything from, access to food, through heating, you know, coal, people getting access to coal and things like that, through to*

*making contact to prisoners of war, so, housing issues, people being bombed out, all that kind of stuff'' (David).*

David chooses to talk about the organisation through an historical narrative. He does not initially discuss the organisation in its contemporary form, but refers to the organisation's history and how it came to fruition, as a means to articulate and 'tell me about' the charity he works for. This exemplifies how a story about the past can function to make sense of an organisation's current identity, by helping to order the central features and aims of the charity and the role they played, and still play, into a whole picture (Zundel et al, 2016). This narrative provides some causal explanations as to how this organisation has come to be what it is today (McAdam, 2008) and highlights some of its enduring features (Albert and Whetton,1985).

The linking of past and present is evident in David's articulation of the aims of the organisation and the emphasis he places on providing people with information – as a central function of Citizens Advice: '*needing a sort of national organisation that could provide people with information and it was kinda very much about information'*. He makes it clear through the repetition of the word *information,* that this is a key element of this organisation's founding principles and that there was recognition at the time, that offering advice and information was an identified need. Relating it to the particular historical context of the start of the second World War, and the specific issues which people were facing, he explains how Citizens Advice Bureaus were offering help, support and advice, as people were dealing with the changes in society, which were not being met by any other organisations or the state.

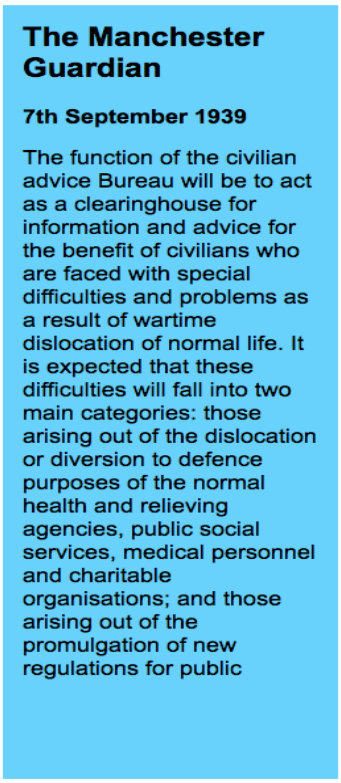
The use of an historical narrative enables the listener to understand the social context of this organisation and how this context has and continues to frame its purposes. As Kirkpatrick and colleagues suggest, storytelling is the individual account of events, which creates pictures in the mind of the listener (2007). David's narration, enables one to imagine a period in time; where women were suddenly entering the workforce, which for many was a new experience, and how large sections of the population had to learn about and deal with the realities of reduced food and energy resources, or cope with the loss of their homes and loved ones. Given the context of considerable social change and uncertainty, the Citizens Advice

service, by positioning itself directly in communities, was able to respond to these 'new' needs. Here the historical 'facts' embedded in the historical narrative, provide both a resource and structure, through which the narrator shares his account of the organisation (Zundel et al, 2016), which despite relating to the past, as my empirical data will show, has endured and remains true of the organisation today.

**Aims of the Charity**

The social goal of the organisation is to promote welfare rights, with an aim to offer advice for people in need in a way which is flexible and in response to societal issues. This has endured and remains the key role of the charity almost 80 years later. Figures 6.3 and 6.4 are both taken from Citizen Advice's website. Figure 6.3 documents the original function of Citizens Advice as documented in a newspaper from 1939 and particularly describes how they responded to the needs of that time and changes in public services and policies brought about by war. Figure 6.4 details the current aims and principles as displayed on their website in 2018. This illustrates how the founding principle of providing information and advice has remained the same, but that it has developed over time, to include an advocacy and lobbying role (which will be discussed in more detail later in this section). In addition to the aims, principles which underpin those aims are clarified, for example, informing people that it is a confidential service and that it is a non-discriminatory service.

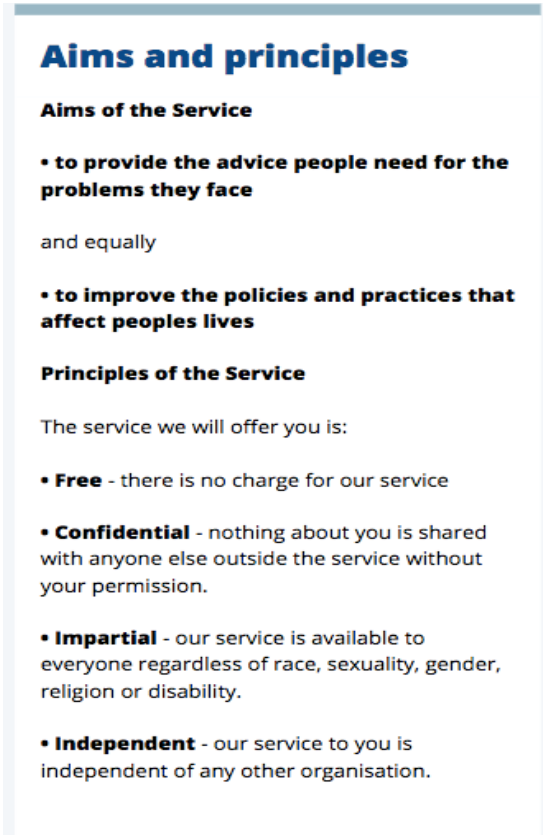
**Figure 6.3** **Figure 6.4**



**The Manchester Guardian**

**7th September 1939**

The function of the civilian advice Bureau will be to act as a clearinghouse for information and advice for the benefit of civilians who are faced with special difficulties and problems as a result of wartime dislocation of normal life. It is expected that these difficulties will fall into two main categories: those arising out of the dislocation or diversion to defence purposes of the normal health and relieving agencies, public social services, medical personnel and charitable organisations; and those arising out of the promulgation of new regulations for public



## Aims and principles

**Aims of the Service**

**• to provide the advice people need for the problems they face**

and equally

**• to improve the policies and practices that affect peoples lives**

**Principles of the Service**

The service we will offer you is:

• **Free** - there is no charge for our service

• **Confidential** - nothing about you is shared with anyone else outside the service without your permission.

• **Impartial** - our service is available to everyone regardless of race, sexuality, gender, religion or disability.

• **Independent** - our service to you is independent of any other organisation.

Interviews I conducted with people who connected with the charity for support provided evidence that these aims and principles are not merely written about, but are happening in practice. I shall return to the ways in which people interact with the charities in later chapters and offer further examples and analysis, but the following section offers one example, to endorse and exemplify the continuity between the aims of the organisation and if and how these are being achieved. This excerpt is from a man who offered this response when asked: *Tell me the story of how you became involved with Citizens Advice;*

> *I got sanctioned, for a month, so they helped me out with advice and food, food banks.*
>
> ***So, sanctioned on your benefits?***
>
> *Yeah. They've also helped me, well, they are helping me out with my income tax. Just any problems you get.*
>
> ***So, you see this as somewhere that you can come for support?***
>
> *Yeah* (Paul)

This is a contemporary example of how the Citizens Advice service continues to respond to the changing needs of society and the economic and political environment. Echoing elements from David's narrative, Paul needs help and advice to navigate the benefits system, but also practical support to access a food bank because his benefits payments have been stopped. Currently, benefit sanctioning as part of conditional welfare arrangements is having a considerable impact on many people who are eligible and require state support (Watts et al, 2014). Research which explores the characteristics of sanctioned claimants has shown that the most disadvantaged people in society are the most vulnerable to sanctions, for example, people with a disability, young claimants and those from black and minority ethnic groups (Griggs and Evans, 2010). The Citizens Advice service provides those who find themselves sanctioned, often due to circumstances out of their control (Watts et al, 2014), a place to get information, where people with experience and knowledge of the system can help them to appeal or at least get access to essential resources, such as food. In the city where Paul lives, in order to access the only food bank, he must have a referral from a recognised organisation. Again, highlighting the gap in both public and private services, which the Citizens Advice service is able to fill. They operate in, what could be described as a middle ground.

**Advocacy**

Later in Paul's interview, I asked him about what would happen for him if Citizen's Advice did not exist, his responses was;

> *'I would get by, but I'd struggle, wouldn't I? Like if I tell you something, then a week later you say no I didn't say that, at least here, you've got somebody that's on your side, it's what you need' (Paul).*

This highlights the advocacy role that this organisation takes, how important Paul feels it is to have somebody on his side, who can provide him with impartial advice and help him to fight for his rights. He articulates a sense of powerlessness or inferiority, that as a lone voice trying to access the correct amount of benefits, he might not be believed and that his word alone will not be good enough. He suggests that it is important to him to have someone else, or the greater "power" of the organisation on his side, to support him, because as he states later in the interview,

*'You're just a small man to them'* (Paul).

Paul's use of *you're*, really emphasises his point and drew me in as the listener because it invites me to take his role within his story. His use of the word *them* de-personalises those who make decisions about him and perpetuates a sense of us and them. Despite how he feels, he proudly suggests that without the support from this charity that he would "get by", but for him to struggle, as he puts it, could mean that he would not be able to access the only food bank in his city. Therefore, he would not have access to a basic human need of food, which could have considerable consequences for both his physical and mental health. As Purdham et al (2016) recognise in their research with people who access food banks, the importance of food is not just related to nutrition, but also to how a person identifies themselves and that not having access to food can have a significant impact on a person's sense of self-worth. This could further exacerbate Paul's sense of powerlessness in the system.

**Relationship with the State**

In response to issues like this, Citizens Advice, recognise that adopting an advocacy role is not only important for Paul and his individual wellbeing, but that their help benefits society generally. By intervening before his situation escalates further, they could prevent the state having to spend considerable sums of money on crisis interventions, such as prolonged hospitilisation, homelessness or mental health interventions. As this excerpt from the local Citizens Advice's 2016 – 17 published annual report details, they offer,

> *Early advice and support help to de-escalate associated problems that may arise through inability to access benefits such as debt, homelessness and general wellbeing. (Citizens Advice, 2017)*

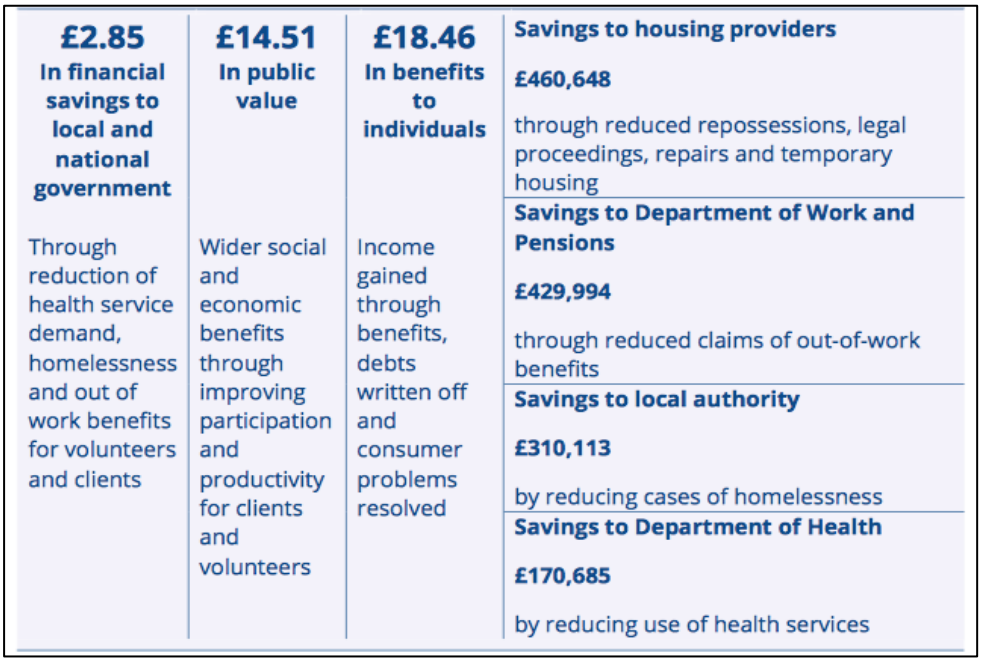
Indeed, de-escalation of problems forms a significant element of what the organisation offers society and how it articulates its worth and social value, particularly to potential funders. This advocacy and early intervention role is mirrored in the other two charities explored in my research. As with many charities, the recognition of any monetary savings, forms part of their fundraising strategy (Dayson and Wilson, 2011) and how they articulate their social value within the competitive

funding market. Citizens Advice recognises the wider impact of the support and information sharing which they offer, that the impact of their services has the potential to increase the general well-being of the person seeking support and that there is social capital to be gained from their work. However, these impacts are notoriously difficult to quantify (Wood and Leighton, 2010) and yet Citizens Advice attempt to do this within their reports.

They claim that the early help which they offer and the fact that they can de-escalate problems from becoming costly crises saves the state money. They translate this into monetary figures, detailed later in the same report. What is not clear within the report is what method or model they employ to produce the sums of money they publish, they simply state that,

> *'Using a treasury approved model, we have only calculated financial benefit where we have robust evidence and have only included figures that have a tangible monetary benefit' (Citizens Advice, 2017).*

**Figure 6.5**




Again, this highlights the interesting position this charity occupies in relation to citizens and the state and that this middle ground is presented as mutually beneficial to society and state. As a charity trying to survive, because it enables them to forge

an identity, which could be described as distinct and therefore arguably justifies their continued funding. Their relationship and position in communities enables them to gather, what they describe as “robust evidence” about issues and use this not only for their own reports and to justify their worth, but to campaign for change.

**Lobbying**

Their second aim *is to improve the policies and practices that affect people’s lives.* This extends their advocacy role, which goes beyond advocating for individuals, but also reinforces their connection to government. They find themselves in a complex middle ground, where they are on the one hand lobbying government and highlighting the weaknesses in their policies, whilst also hoping to work with them to try to affect change and ideally secure future funding. This creates a relationship between the organisation and government which could be described as both ‘symbiotic and adversarial’ (Boris and Steverle, 2006: xi).

According to their website, this aim evolved during the 1980s and again was in response to the political climate at that time;

> *‘During the 1980's inequality increased dramatically. Unemployment doubled and employment enquiries rose by 50%. With recession kicking in, debt and benefit enquiries reflected not only the rise in poverty, but also the increasing expertise of CABx in this area. Working with other national and local groups, CABx increasingly took the information they received from the thousands of clients they helped every year and used this in discussions with the Government on the formation of their policies’ (Citizens Advice, 2017:np)*

This articulates how the organisation recognised that their position within communities enabled them to not only identify and respond to changing needs, but to develop a specialist knowledge in this area of social welfare. Their experience of front line support, implied that they could provide evidence of what was happening in society, and that they could draw on their expertise and status as an independent organisation to become the voice for the disenfranchised and endeavour to shape policies and services (Slocock, 2017). That they had a ‘foot in each camp’ as it were, because they were working together with ‘ordinary’ people to support them to deal

with societal issues and yet they were also in a position to be involved in discussions with government. As O'Halloran notes, for those charities which are politically adept and have the required organisational skills and time to work effectively with government, they can 'exercise real leverage when representing sector issues in policy negotiations' (2011:4).

As David, the manager from the local branch describes in the following interview excerpt, this element of the organisation's work remains important to Citizens Advice charities locally, but his description lacks the sense of partnership approach, which is described on the national website;

> *'So, we produce reports about these common themes that go through, so, we have produced a report on employment support allowance and how people are assessed for that and the unfairness of that treatment. We produced a report around sanctions, about how people are being sanctioned for thirteen weeks with no notice and people are finding themselves in a very difficult situation, so that's, that's a really strong part of what we do. If we're not helping to prevent the problems, then we're just waiting for the queue to build up' (David).*

David articulates a more adversarial relationship with government. It does not indicate that this style of lobbying involves a partnership approach to dealing with issues brought about by government policies, but a more critical stance, where problems are detailed in published reports and the state's treatment of people, described as unfair. Having observed this charity over the last three years, this exemplifies some of the disconnect between what the national organisation states, and the realities of working in a provincial charity. As an umbrella body, which has a national remit and is positioned in the capital city and therefore closer to government (both physically and metaphorically), a partnership approach with government is more accessible and therefore possible. However, this is more problematic for the smaller organisations, who may have access and relationships to their local members of parliament and councillors, but rely on the larger, and arguably more powerful, national body to speak on their behalf. The fact that their lobbying aim, which was initiated over 30 years ago, is still recognised as a key element of the

organisations work is relevant when considering the sustainability of this charity. In a capitalist society, and within the context of a neo liberal approach to welfare and austerity (Chapter Two), forging a relationship with government could be seen as an important survival strategy, especially when competing for material resources. As Weakly observes, writing for Civil Society, '...the sector seems keen to offer the government solutions to problems instead of unrelenting criticism' (2016:np). The realities of having to rely on state funding to survive undoubtedly underpins how and why a third sector organisation interacts with government in a particular way. Historically, this charity has been heavily funded by local authorities, as documented on their website (See Figure 6.6).

**Figure 6.6**

**Citizens Advice Bureau income 2010/11**

| | | |
|---|---|---|
| Local government | £76,000,000 | 42.7% |
| Legal Services Commission | £26,000,000 | 14.6% |
| Financial Inclusion Fund | £17,000,000 | 9.5% |
| Primary Care Trusts | £8,000,000 | 4.5% |
| Big Lottery Fund | £6,000,000 | 3.4% |
| Other sources | £45,000,000 | 25.3% |
| **Total** | **£178,000,000** | **100%** |

Whilst, this partnership adopted by the national organisation could be seen to have its benefits, it could also be in juxtaposition to the aims of being the organisation which supports people and offers independent advice. My evidence suggests that this has an impact on the organisation's identity and detracts from their claims of being independent. Referring back to Hatch and Schultz's (1997) definition, organisational identity refers broadly to what members perceive, feel and think about their organisations. Of note, the people I interviewed, who had sought help from this charity, seemed unaware or unsure whether it was a charity and assumed that it was a state led organisation. For example;

*'I honestly thought it was a government body, genuinely. And I don't know if I am being naïve in the fact that I didn't know it was a charity, I just think, I've never really had much to do with it before. Yeah, I was absolutely baffled when I realised it was a charity' (Anna).*

*'Mmmm to be honest I thought it was run by the council.*
***So, you didn't know until now, or recently that it's a charity?***
*Well, I know they have volunteers, so it must be in some way a charity, but I wouldn't have thought that. Their primal interests would be in the council's interests' (Jim).*

People's perceptions, having sought help from this charity, is that it is run by the Local Authority and as Stuart suggests, this relates to what he perceives to be their primal interests, which in his opinion, is more aligned with the state, rather than with him. Although he recognises that they utilise volunteers, which is not something usually associated with statutory services, he does not relate what he sees and feels about this charity to his understanding and knowledge of what a charity is. This reflects how the inter-sectoral boundaries within a mixed market of welfare provision in the UK, have become blurred (Buckingham, 2012), which can be attributed to the way in which some third sector organisations have incorporated the language, practices and procedural mechanisms from both the private and public sectors, whilst still endeavouring to abide by an ethos of voluntarism (McCabe, 2012). This is evident within Citizen's Advice, as articulated by David when asked what makes the charity distinct;

*'What sets us apart from other voluntary organisations, I think is the quality of what we do. Every piece of work we do is all audited, so and that's a constant, to be a CAB you have to follow the membership standards. There's a quality of advice framework in that if we did not pass a certain standard, then we would, ultimately, we couldn't call ourselves a CAB, so best intentions aren't good enough' (David).*

He uses words such as audited and refers to membership standards, which could be associated with both private companies, but also statutory services. This has been

described within research as the ‘audit explosion’ within the third sector (Paten and Foot, 2000 and Buckingham, 2010), which is in response to organisations’ desire to re-enforce and publicise their performance standards in order to differentiate themselves from other organisations and to demonstrate that they are reliable, transparent organisations that strive to meet certain standards within a competitive market. As Paten and Foot recognise, audits have now become ‘an important means by which societal expectations of rationality, control and effectiveness are expressed and become internalised in organisational arrangements (2000:330). It is understandable that adhering to particular standards is important to the organisation, to guide and justify the services they offer. Furthermore, it potentially sets them apart from other third sectors organisation they may be competing against. This does however have an effect on how they are perceived by the public. It marries well with their distinction claims in relation to other organisations in the sector, but is in conflict with its aims of being independent, at least being perceived to be so by those who come to their organisation for support.

**Cancer Care**

**Aims and Local Remit**

Founded in 1983, CancerCare started as a volunteer led phone line service, which was based in a hospital and had the aim of supporting people from the local area, who had been diagnosed with Cancer (CancerCare, 2018). This charity differs from the other two charities in this study because it is a fully independent charity and is not part of a larger, national network or connected to an umbrella body. The “About Us’ section of their website states that;

> *‘CancerCare is a unique independent charity dedicated to helping families affected by cancer and other potentially life limiting conditions living in {name of districts}’(CancerCare, 2018).*

They are very clear about who they support, specifically people with cancer or life limiting conditions, and where those people need to be geographically in order to be eligible for that support. Many small charities have very specific remits similar to this, with localism being important to their identity. Add in

Yet, in response to pressure from the state around reduced funding (as discussed in Chapter Two), coupled with a national commissioning culture which favours larger scale organisations, many small charities have been encouraged to merge with other similar organisations to widen their geographical reach, or diversify their programmes in order to attract different streams of funding (Wallace 2009). As Kay puts it, 'the demise of grants and rise of contracts has resulted in government funding shifting from smaller, local charities to bigger ones' (2017:1). A report by Lloyds bank, titled Commissioning in Crisis identified that a 'preference for larger contracts has seen small and medium-sized charities lose up to 44 per cent of their income from the public sector' (2016:3).

However, in contradiction to this, it has been recognised by those working in the sector (Atkinson, 2016) and within academic literature (Backus and Clifford, 2010) that trust in large national and international charities has been questioned by the public in recent years. It has been suggested that this is in response to high profile examples of charities, where financial mismanagement has led to their collapse and loss of public money, or what has been described as inappropriate and aggressive fundraising techniques adopted by some large national charities (Siddique, 2016). For example, a report written by Populus, commissioned by the UK Charity Commission highlights, how trust in charities seems to be directly related to familiarity and local;

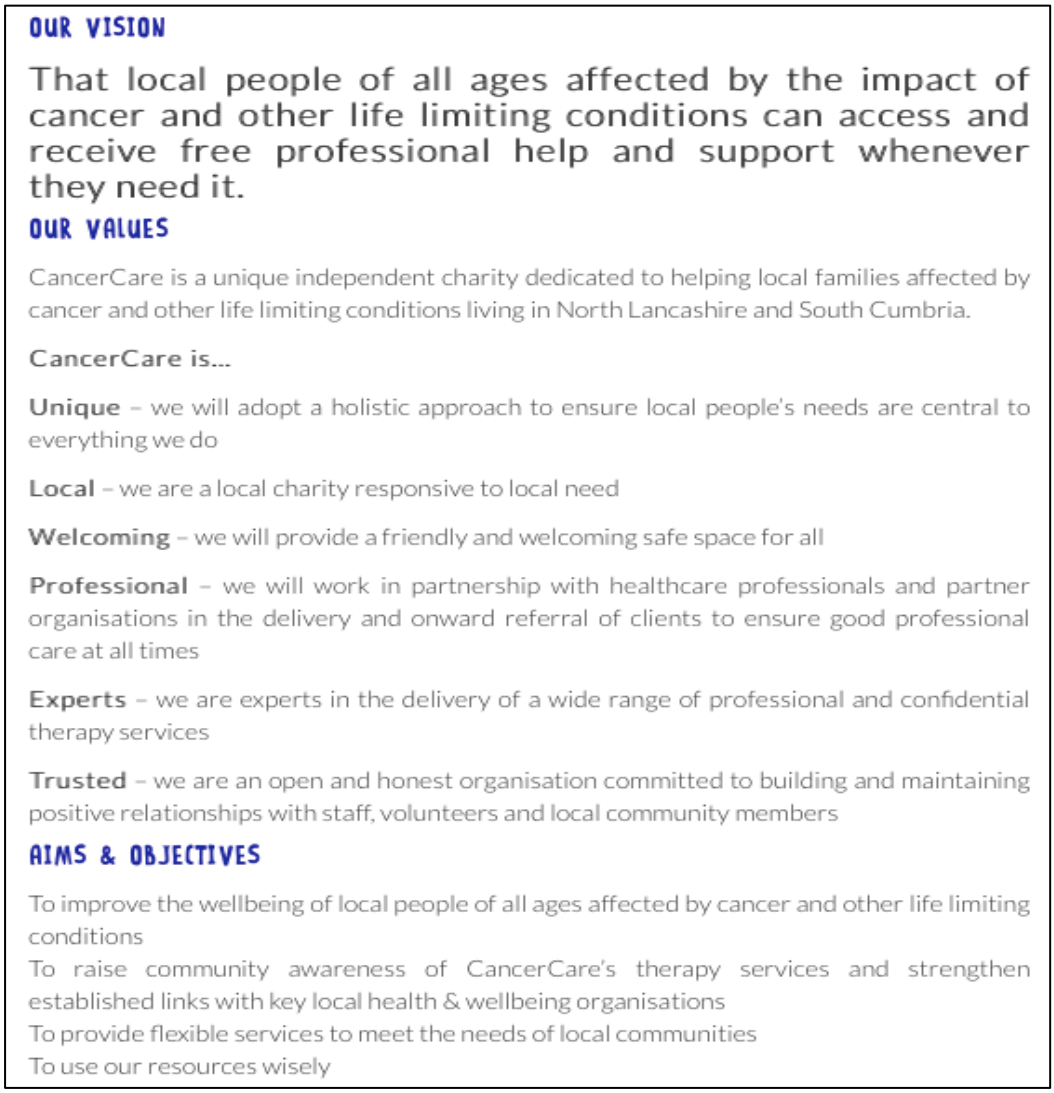
> *'Familiarity, and a connection with the local community, are important when the public choose which charities to trust. Three-quarters of the public agree that they trust charities more if they have heard of them, and three-in-five agree that they trust charities more if they are providing services within their local community'* (Populus, 2016).

In response to these contradictory perspectives, charities could feel unclear about the best way to present themselves. Should they merge or get taken over by a larger organisation, in order to be eligible for different types of funding, or, do they promote and champion the fact that they remain relatively small and offer local services, to local people, which potentially leads to greater trust and access to more local resources? Relating this to Resource Mobilisation Theory, it creates a dichotomy between pursuing the more fungible resources, such as an injection of money from a

national organisation, or relying on context dependent resources. My data suggests that CancerCare identifies and celebrates the fact that it is local, and this is central to their identity as articulated in their public documents, but also by those who work for the charity and those who have sought help from them. Their independence from a larger, umbrella body and specific remit, make this charity distinct from the other two charities in this thesis.

CancerCare's publicity (via their website and leaflets), suggests that they recognise that this independent status and local remit is a strength and a 'unique', or distinctive feature to be celebrated. Indeed, the word 'local' features in three of their four aims and objectives and also in the values section detailed on their website (see figure 6.7).

**Figure 6.7**



OUR VISION

That local people of all ages affected by the impact of cancer and other life limiting conditions can access and receive free professional help and support whenever they need it.

OUR VALUES

CancerCare is a unique independent charity dedicated to helping local families affected by cancer and other life limiting conditions living in North Lancashire and South Cumbria.

CancerCare is...

**Unique** – we will adopt a holistic approach to ensure local people's needs are central to everything we do

**Local** – we are a local charity responsive to local need

**Welcoming** – we will provide a friendly and welcoming safe space for all

**Professional** – we will work in partnership with healthcare professionals and partner organisations in the delivery and onward referral of clients to ensure good professional care at all times

**Experts** – we are experts in the delivery of a wide range of professional and confidential therapy services

**Trusted** – we are an open and honest organisation committed to building and maintaining positive relationships with staff, volunteers and local community members

AIMS & OBJECTIVES

To improve the wellbeing of local people of all ages affected by cancer and other life limiting conditions
To raise community awareness of CancerCare's therapy services and strengthen established links with key local health & wellbeing organisations
To provide flexible services to meet the needs of local communities
To use our resources wisely

This preference for a local focus was evident in an interview with two of the charity's employees, who cited the local perspective as a reason they chose to work for the organisation in their interviews. Seemingly, it was part of the organisation's identity, which made working for it appealing for them, thus their local context was influential in them attracting and then mobilising their human resource;

> *'I just wanted to work in a local charity, which makes a difference in my local community. Having worked for national charities, it takes a long time to get stuff done because they are big and because there are loads of systems to go through. So, I wanted to work somewhere as part of a leadership team, where we can make decisions and implement them quickly for the local people we're trying help'* (Alice).

Alice creates a positive association with the local remit, by comparing it to her experiences of working for a larger, national charity and her frustrations with their multiple and seemingly more bureaucratic systems. She takes a pragmatic approach, which suggests the local element provides her and her colleagues with more autonomy and the ability to act in a timely manner for those in need of support. Her use of the term 'leadership team', recognises that there is a management structure within this organisation, but that their relative smaller size as an organisation, means that any decisions made within that team only have to go through one process, or system as she describes it, before it has a direct impact on those seeking help from the charity.

Her personal connection to this locality is also relevant. She makes it clear that not only is this a charity which is community based and aimed at supporting members of that community, but by creating a personal association with the area, describing it as '*my local community*', suggests that she has a vested interest in the work. In this instance, the term community is referred to in a territorial sense, for example the city and town is what denotes the community, rather than in a relational sense, such as communities which form because of a group's shared experiences. It is important to note that the relational community element is very relevant to this organisation, this is elaborated on later in Chapter Nine. One could say that Alice brings her

experience and acquired expertise of working outside her community, or in this example for a larger organisation with a national remit and therefore greater scale, back to her own community. As Yakushko and colleagues note, a desire to return to our communities, is often connected to a realisation that we are in a privileged position to bring that 'knowledge back to those we consider our cultural "family"' (2011: 279).

Coming from a different perspective, but complimenting the connection between local community and cultural family, this excerpt is from a woman who initially came to the charity for support following a diagnosis of cancer, who then became a volunteer and now works as an employee. It explains why CancerCare being a local charity, was important to her;

> *'……because it is local, because you are seeing the people that benefit from it, because you meet those people, it could be your mum's sister, your aunty, it could be anybody that could need those services, so you think, well actually I want to give back there'* (Jenny).

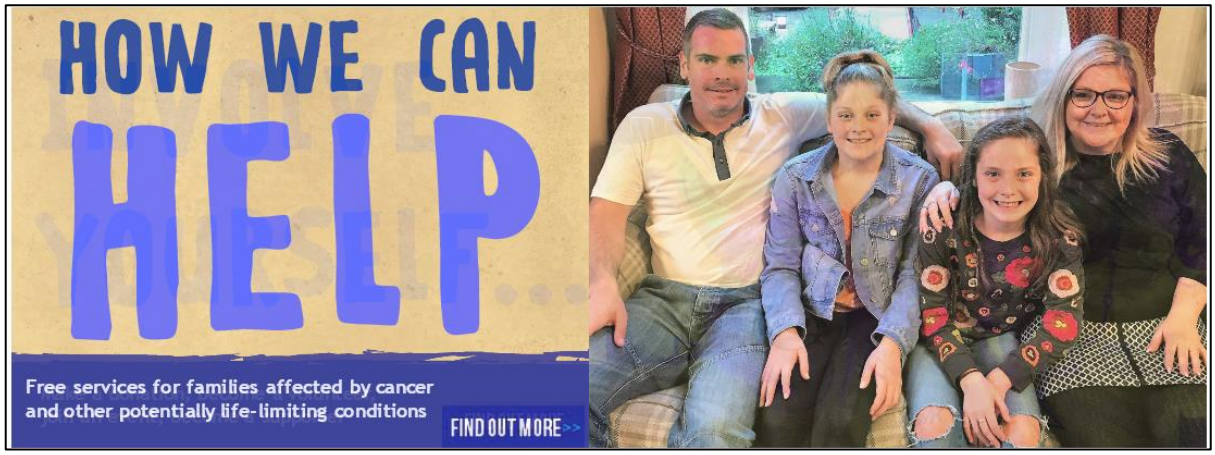
This really emphasises the notion of familiarity, as described in the charity commission report quoted earlier. Her trust in this charity is demonstrated by her continued association with the organisation (which is a theme with others who volunteer for CancerCare), but she also articulates how her motivation to remain involved and develop her role there, is related to those who it supports. The fact that it is a local charity makes it more meaningful for her, because she has a sense of connection to those who could benefit from it. She makes this even more personal than her community and relates it to family, perhaps recognising that the survival of this charity is not only important for her community now, but also, like an insurance policy, it could be needed for her family in the future. The charity was available to support her when she needed it and she wants to contribute to its survival, to ensure that it remains a possible source of support for her family should they need help in the future. She specifically states that she wants to give back *'there'*, therefore not in another place that she is not familiar with, but in her community, her locality, where there are people she knows or is related to.

I recall that the manner in which Jenny articulates this and the words she chose to use, invited me as the researcher and the listener, into that community and familial space. Her use of the words, *'your mum's sister, your aunty',* prompted me to imagine my family and enabled an understanding of why working in one's own community, where one's family might live, is important to her and could be important to me. As Riessman (1990) recognises, language, both in the research interview and social life in general, is a significant cultural resource which the research participant draws on to create reality in partnership with the researcher. In this instance, I was drawn into her reality and was able to connect it to my own, which enabled me to gain a richer understanding of the importance of the connection between those who seek help from this charity and those who offer support.

**Holistic Response to Need**

This theme of family and helping not just the person diagnosed with cancer or a life limiting condition, but supporting their whole family, forms part of the central aims of CancerCare and is articulated in many ways via their publications and social media, as illustrated in the use of this picture here (See figure 6.8), taken from their website. As the viewer of the photograph, we are unaware which family member is, or has been, unwell.

**Figure 6.8**




They are clear that the support they offer is for all people affected by Cancer and life limiting conditions, therefore not just the person with the diagnosis, but all those

whose well-being could be compromised and affected. The following excerpt from my interview data is from a woman who received support from the charity after her diagnosis of breast cancer and articulates how this does happen in practice in this organisation;

> *'It is individual and flexible, very much so and not just the individual that's got cancer, but anybody who's affected, you know siblings, parents, partners, everybody can go and have that care, which is again that is wonderful because, so often the focus is on just the person'* (Lottie).

This central feature is an important aspect of the organisation's identity. They recognise that in order to improve the well-being of local people affected by cancer and other life limiting conditions, that it is beneficial to respond to the needs of the people around that person and for those interviewed for this study, this was their family. Lottie clearly articulates this, by listing all the people around a person who can feel affected. She helps me as the listener to understand how she feels CancerCare is different, that their focus goes beyond the individual. This forms part of what they describe as an "holistic approach" within their organisational values, suggesting that they do not simply consider the physical implications for people coping with cancer or a life limiting disease, but they also recognise and offer interventions which are in response to the social environment in which they are coping with this diagnosis. They look at where the physical, psychological and social contexts of people's illnesses intersect (Ruch et al, 2018) and go beyond an individualistic, medical model, which has an intrinsically individual focus (Dailly and Barr, 2008). As this quote from their website states;

> ***'How we can help***
>
> *At CancerCare we know that living with cancer or a life limiting condition is more than just a physical issue and can have a wide ranging impact on many aspects of life for all those involved.*
>
> *Our therapies aim to: Improve wellbeing: relieve symptoms: encourage self-confidence: promote relation: help with pain management: ease the physical*

*and emotional effects of medical treatment: and provide extended support to carers and families' (CancerCare, 2018:np).*

Examples of the holistic approach taken by CancerCare, were found in all the interviews with this charity. One of the volunteers interviewed, described how the process of assessing people's needs, in order to offer this holistic support package, happens in practice;

*'Here people come and have an assessment with somebody and it's an holistic needs assessment. Somebody spends an hour or an hour and a half, sitting listening to everything about them, you know including their spiritual needs and all the rest of it and then talks through the things that you can have, you know these are the therapies we offer and from what you've said this might be useful for this' (Andrea).*

Here Andrea highlights how each person who seeks help from this charity is initially offered a needs assessment. Andrea adopts the discourse from their website and promotional documents and uses the words *holistic* and *needs*, suggesting that the volunteers are perhaps trained to understand the organisational aims. She chooses to add the detail of how long the assessment sessions take, perhaps because she recognises that this is much longer than consultation times offered by the National Health Service. CancerCare are able to offer time to those who seek help from them, to ensure they understand not only the physical issues they face, but also the psychological and social issues. As Andrea suggests, they can listen and develop a bespoke package of care, based on the therapies and services they offer. Comparisons to other organisations is a fundamental element of identity claims (Shultz et al, 2012) and can act as a source of provenance, development and evolution of identity.

**Relationship with Health Services**

CancerCare, similar to Citizen's Advice, provides a service, or form of support, which the state or specifically the National Health Service (NHS) in this example, does not currently offer. This is articulated in the following interview extracts, with the first being from an employee, who has had breast cancer. She discusses how she does

not feel that the NHS has the human resource capacity to offer the services which CancerCare does and that even if they did, that the therapeutic value could be lost. She expresses how she feels it would not work in the same way if offered in a clinical environment, with all the associations that brings for patients of their diagnosis and challenging treatment;

> *'I don't think the NHS can offer this, I don't think they've got the ability to, you know, it would be just like lifting CancerCare up and putting it in a clinical environment, there's no need, I just don't think they've got the people to be able to do it and that's no criticism on the profession and those that work in that profession, they've got caring aspects to it, but clinically the lines can get blurred and a lot of people just don't want to go back into that environment because it's, that horrific, erm so coming away from it, coming to somewhere like this which is completely detached in every aspect – geographically, erm and the actual environment itself, you know, it creates a safe place for people to come into and you know you don't have to hold it together here, where as you would be bumping into other people' (Sally).*

Drawing on her own experience, Sally articulates how she does not think that the NHS and its staff could deliver what CancerCare does, she recognises their skills and the care that they do provide patients, but that they would not be able to offer this support service in the clinical environment. This is particularly evident in her use of the word horrific to describe her memory of the hospital environment and how it important it was to her to move away from that and detach herself from the experience. It is interesting that she connects the horror of the hospital environment and the associations it has of her illness, to a sense of having to *hold it together* because of the possibility of *bumping in to other people*. This suggests that she feels more able to show her emotions in the charity environment, which she describes as being a *safe space* for her. Where she is surrounded by others who have either experienced the same as her, or will accept that people come to deal with the emotional aspect of their illness. Her use of the words safe space suggests that the hospital is somewhere to go to endure the physical treatment, but that CancerCare is where the emotional treatment takes place.

This sense of the hospital environment being frightening was also discussed by another research participant, Lottie. She vividly describes her experience of hearing her diagnosis in the hospital environment;

> *'You're sat there, and the world just spins around your ears, the room floods with people, you see Macmillan badges on people, which is scary and then somebody tells you you've got cancer and then they tell you what is then going to be the next 6 months of your life and you are completely at the mercy of them. And they're wonderful, they're not scary, but the whole thing is scary' (Lottie).*

Lottie articulates the embodied sense of shock she felt sat in the hospital, waiting for her diagnosis. She vividly remembers the scene and the sensations she was experiencing. How even before hearing the diagnosis, she felt frightened because of the associations of cancer she made when she saw the Macmillan nurses in the room. Perhaps this relates to an imagined narrative (Andrews, 2014) she had, of what receiving a diagnosis of cancer would be like, and it was frightening experiencing this actually happening in reality. What is also striking is how she describes a sense of losing some of her autonomy, as medical professionals had to plan how to treat her. Whilst her interview does not suggest that this was something she fought against, and perhaps there was some level of acceptance, a later interview extract with her describes how she felt she had lost herself in the process and her ability to express her emotions. That in order to protect her family and endure the process, similar to Sally, suppressed her emotions, which meant that she was not being 'herself';

> *'(nurse's name) really recognised that I was, that I had obviously contained an awful lot away from the children and probably a lot from my parents, because again, I'm their baby. My husband probably took the brunt of it, but we'd only lost his mum six months before my diagnosis, so it just became apparent that actually I hadn't chatted it through. It wasn't that I was in denial, because I clearly wasn't, but there was more to, I needed to start to talk about how I felt, off load really and vent and cry and just become completely me' (Lottie).*

Lottie chooses to offer detail in her narrative about her family and how they were feeling and what they had experienced previously in relation to cancer diagnosis. I am struck by how important it is to her to articulate to me that she was not in denial, but that, with prompting from the nurse she could identify that she needed to talk to someone about her experiences. This illustrates the relationship between the NHS and this charity. Here the nurse identifies that Lottie needed to talk and express the emotions which she was containing for fear of upsetting others, but rather than offering this support herself, she referred her to CancerCare instead. Perhaps recognising that this did not fall within the remit of her position, or that the charity is more skilled and able to offer the psychological support that she felt Lottie needed. Whichever is the case, it is further evidence of ow charities fill a middle ground between citizens and the state, and these are various middle grounds.

This echoes what Sally described about separating the two environments and not blurring the boundaries. That the clinical environment is for the diagnosis, treatment and a place where the physical aspect of the illness is focused on. Whereas CancerCare offers the psychological support and an environment for people to express their emotions and process the trauma of diagnosis and treatment.
This is summed up by another employee who referred to the charity's founder and his original vision for the organisation;

> *'It's so unique, you know, and Professor Maclemurray, 34 years ago, to have the foresight to see that there was a need for care of the emotional aspect of the diagnosis is just incredible, absolutely incredible' (Beverley).*

**Combining Physical and Psychological Support**

This vision from the founder remains today, but as the following interview excerpt illustrates, CancerCare offers a combination of both emotional and physical support, through their use of complimentary therapies such as massage. Here, Jenny who has terminal cancer and comes to Cancer Care for a massage each week, expresses in the two separate extracts how the support she receives impacts both her physical and psychological health;

*'I have massage every week. I only have muscle on half my neck now, so one half is just like, what do you call it, scar tissue, on the left side and the right side is normal muscle and I come and have a massage each week, which keeps my shoulders and my neck relaxed, because if I get stressed, upset, the pain. That is immediately what happens is that I tighten up and those muscles tighten.*

***And is that something you could get on the NHS?***

*No, No*

***And that's not ever been offered to you?***

*No, no, the NHS really haven't, apart from medicine wise, with chemo and radiation and what have you, have never offered any kind of palliative care, it's not, I don't think it's done on the NHS, so thank goodness.*

*I don't think, I don't think there is anywhere that provides the services that this place provides.*

***What would happen for you if there wasn't a CancerCare?***

*I wouldn't like to think where I'd be now to be honest, or what position I would be in. Yeah, I'd probably be in a hospice by now, because I wouldn't be able to cope on my own, so, it would yeah, which really doesn't, no…, does not appeal to me, I'd rather not be here at all than be stuck with somebody looking after me 24/7' (Jenny).*

Her recognition that without the support she receives from this charity, that she thinks she would have to be admitted to a hospice and how she would rather not be alive than deal with that, is very moving. It is a stark example of how, through offering time and different types of therapies, which she stated could not be offered to her on the NHS, this charity is de-escalating the situation which Jenny has to cope with. As she puts it, *I wouldn't like to think where I'd be now'*. It is impossible to establish within the scope of this research interview, whether having a massage on her neck once per week and the additional psychological support that is part of this, is indeed the difference between her having to be cared for in a hospice. However, she clearly thinks it is and this is important. It is one piece within a jigsaw of interventions which enables her to remain at home, but the fact that Jenny connects these two elements is what is interesting, and establishes how important this charity is to her and her ability to cope with her diagnosis.

Later in the interview she articulates how she receives indirect psychological support at the charity, which does not come from a councillor, but is informal as part of her weekly massage session;

> *'It helps mentally. You've got someone you can come in, you can come and see a counsellor if you've got major issues, or like me, I'll talk to {name of massage therapist}. It's getting it off your shoulders and even if they don't truly understand what you are on about, they'll give you their opinion. So, I find it, very, very helpful because I know, no matter what's bothering me, there's somebody at the end of the phone, or I come on Tuesday afternoon, where I can let it go' (Jenny).*

Here the intersection of the physical, psychological and social factors occurs in the therapy session, where Jenny gets relief from the physical pain she experiences and in the process of that physical therapy, she has the opportunity to talk and share some of the psychological issues she is dealing with, which are both affected by and will have an impact on her social circumstances. Underpinning this is the relationship she has with the therapist. She articulates how she feels able to talk to her and share her issues and recognised that she will be listened to and engaged with, which highlights the relational and psychosocial practice I observed in this charity.

Lottie, who accessed supported after being diagnosed with breast cancer, articulates this perfectly in one sentence;

> *'Its multi-facetted, the support is like layers and, sometimes you don't even know you are being supported because it's so subtle' (Lottie).*

To summarise, this charity's central feature is to support people from its local community, affected by Cancer and life limiting diseases. It is an independent, local charity which was established because there was a recognition by its founder that the NHS was unable to offer the emotional and psychological support that some cancer patients required. Adopting a holistic, needs based approach to support has enabled the organisation to offer a service which is distinct from the clinical approach

offered by the health service, but which is complimentary and serves as a place to refer patients to. Whilst it has developed its service to include people with life limiting conditions, its specific remit and local focus has endured.

**Home-Start**

The final charity in this study is a franchise of Home-Start UK, which describes itself as 'one of the leading family support charities in the UK' (Home-Start, 2018) and uses volunteers to support families who have at least one child in the family under five years of age. The local scheme explored in this research (scheme is the word this organisation uses to describe the different local franchises of Home-Start), began in 1999, some 26 years after the original Home-Start scheme was founded. It operates out of a single office and employs three members of staff, on a part time basis. There are similarities with this local charity and the Citizens Advice branch, in that it is an independent, locally managed and locally funded organisation which is affiliated to a larger, umbrella organisation. However, unlike Citizen's Advice, Home-Start has become an international organisation and now operates in 24 countries around the world. As detailed in this extract from their website;

> *'Margaret began the charity in Leicester in 1973 and led it for 25 years. In the 1980s Home-Start was the fastest growing social franchise in the UK, spreading from the East Midlands to all four corners of the UK and into British Forces base in Germany and Cyprus. In 1998, Margaret also founded Home-Start International in response to requests from more than 22 other countries wishing to adopt the Home-Start approach' (Home-Start, 2018).*

What is termed 'a social franchise' approach has been adopted by Home-Start, which mirrors the franchise model employed by numerous commercial companies (McDonalds being one of the most internationally recognised examples of this). The organisation has replicated and shared their model of family support services, which has enabled them to increase their scale and reach, without the need to consistently "reinvent the wheel" of family support projects in different cities, towns and countries (Berelowitz, 2012). This approach relies on a formal relationship between the franchisor, in this instance Home-Start UK and the franchisee, which ensures that any local charity which adopts the Home-Start ethos and brand, must adhere to and

meet specified requirements in terms of quality and assurances. This is formalised in the “Home-Start Agreement’, which this particular Home-Start scheme adheres to. It is designed to ensure that the national charity’s core principles and standards are enshrined in the local charity’s practice and governance (Lyon and Fernandez, 2012) and inspection visits, described as Quality Assurance reviews, by the national organisation take place every three years.

This map (See figure 6.9), taken from their website, illustrates the scope of this organisation in the UK and identifies the areas where the 269 local Home-Start schemes are situated.

**Figure 6.9**


The original Home-Start was founded by Margaret Harrison who identified through her own voluntary work, and whilst working in partnership with other professionals, the importance of taking a whole family approach to supporting children. She acknowledged that the needs of a child should be considered within the context of their family/career’s relationships and their home environment. As these extracts from Home-Start’s website describes;

*'While working as a voluntary worker in the then Children's Dept of the City of Leicester, Margaret developed a growing belief that, as well as volunteers supporting individual children, the families of these children required intense help. Her discussions with professional workers in health, education and social work convinced her that this new approach was needed' (Home-Start, 2018).*

*She realised that if parents get support and friendship from another parent, they will be better equipped to learn to cope with the many difficulties life can bring, and will be able to give their children the best possible start to their own lives' (Home-Start, 2018).*

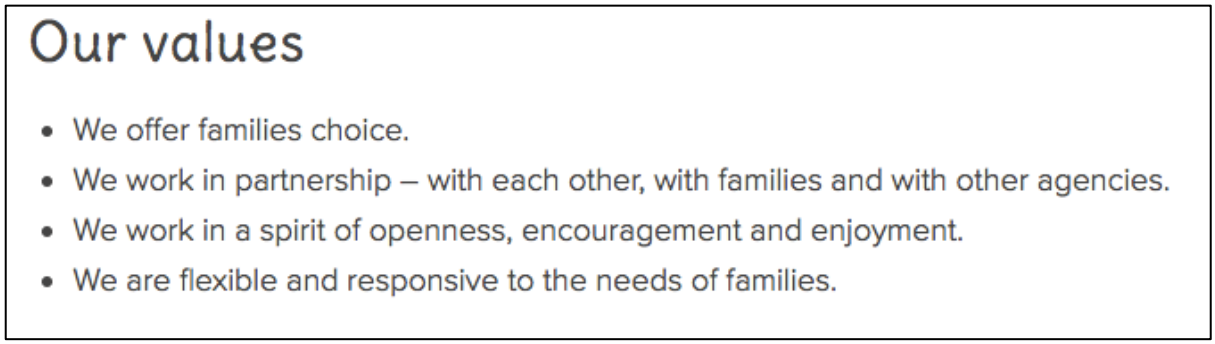
These accounts of how the organisation was formed, offer an insight into the central features of the charity's identity, such as voluntarism, community outreach, partnership working, peer support and a flexible, needs based support for young children within their families. This narrative, helps to map the charity's identity for its current organisation members (Humphreys and Brown, 2002). As Grant and Hardy (2004) recognise, a narrative of how an organisation was founded can be crucial to understanding the development of that organisation's identity, which is often closely tied to the values, goals and personal identity of the founding person. However, whilst a charismatic, entrepreneurial founder can be intrinsic to the successful launch of an organisation, it is insufficient unless other stakeholders, in particular staff and volunteers, are committed to sustain it (Young, 2001). The commitment to a whole family approach and using volunteers, who offer peer support as parents themselves, has been sustained and remains a central feature which has endured over 45 years. For example;

*'Our main aim is to help families in the local area, erm, and our main areas is to support families in the home, in the way of providing a volunteer and the support. The support can be a range of different ways, it can be actually getting mum out and about. We offer practical support and emotional support, so practical support can be, mum might struggle getting out shopping or, just different things like that, or she could also be down and just needs something*

*else to support her and have a chat to us, so we support two ways really' (Angela).*

This and the previous narrative about the founder, articulate how this charity goes beyond simply offering practical support and information to parents, such as helping them to go shopping with small children, but that they recognise the need for peer-to-peer emotional support also. The benefits of peer support for families and improved outcomes for children is explored by Robbins et al, in their 2008 literature review on the subject, which identifies that as a method for helping children and their families, it can help build self-efficacy in parents who might be struggling to cope. This resonates with Home-Start's values, which focus on working together with families, being responsive to their needs and being open and encouraging, (Figure 6.10)

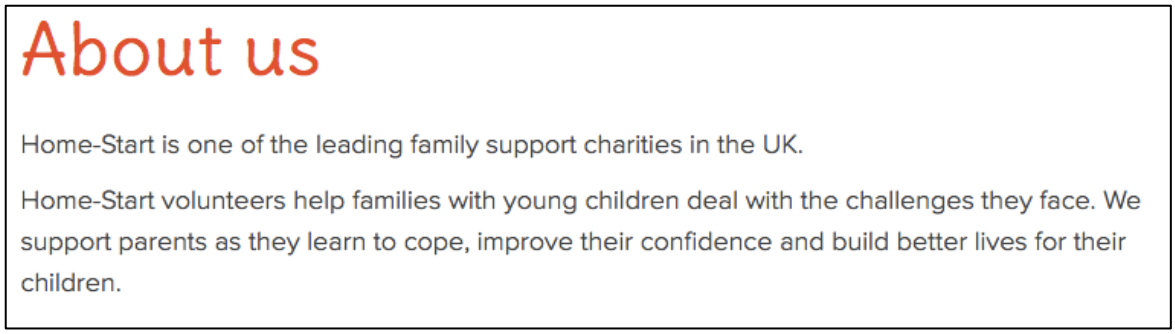
**Figure 6.10**




(Home-Start UK, 2018)

A feature which distinguishes them from Statutory services, as detailed in their values, is that they offer families choice. Families choose whether they want support from Home-Start and what that support involves is mutually agreed and not imposed. Helping to develop coping skills and employing a positive approach to support which is based on befriending, is something I observed to be very strong at this charity and appears to underpin all their work, including the statements 'about us' (Figure 6.11)

**Figure 6.11**




(Home-Start UK, 2018)

This interview extract from one of the paid staff exemplifies this;

> *'Well, families care for each other no matter what's going on and I think that is the ethos of Home-Start. We do try and keep everything, erm on a friendly basis and the families don't have to do anything they don't want to do, but we always encourage them to do the best they can with whatever situation they're in' (Mary).*

This articulates how Home-Start recognises that families can find themselves in challenging circumstances and as further data examples will detail, these are often related to structural issues beyond their control such as poverty, issues with benefits and housing and also mental distress and domestic abuse, but that despite this they look for the strengths within the family unit and celebrate their ability to care for each other and encourage them to do the best they can. I have observed a philosophy that believes that a parent, in principle, is able to offer care to their children and that they take the approach that parents are only offered advice when they ask for it (Asscher, et al, 2008).

A central feature of this charity is that the volunteers it uses are parents themselves and can offer specific advice, guidance and support, based on their personal experiences. Recognising the importance and effectiveness off peer support in this context. The following excerpt from this local charity's annual report describes this;

*'We Offer Volunteers with Parenting Experience.*
*We recruit volunteers that have some form of parental experience, we have found that our families want someone who is a parent themselves, because they understand the problems and situations that our children put us into' (Home-Start (local scheme) 2017).*

That volunteers are matched with which family is important to the charity. My data revealed that in practice this forms part of what they describe as the 'matching' process at Home-Start. The scheme manager ensures that volunteers and families are well suited to each other, that the views of the families are sought and indeed are intrinsic to the decision of who is connected with whom;

*'We'll then do a match, which is quite, we've got to make sure the match is going really well, it's no point putting a quiet volunteer with a quiet family, you want a good match, so you want somebody that, we always ask a family, 'what sort of volunteer would you like, what would you like to do with the volunteer?' and sometimes they might say, can I have somebody a bit older than me, have somebody a bit younger and we do' (Barbara).*

This recognises that in order for peer support to be effective, it should be founded on the key principles of respect and mutual agreement and that both parties can understand each other's situation empathically, because of shared experiences of parenting. This is articulated in this next interview extract, where Gemma, who is a young mother describes how her volunteer role modelled infant bathing, which she found more beneficial coming from another mother, rather than a professional;

*'I didn't even know how to bath him, I was a first-time mum and I was only about 21 when I had him, think it was just before my 21st birthday, so then she'd help me with, am I holding him properly? Am I bathing him right? Cos I was absolutely petrified about bathing him. The health visitor wasn't actually that much helpful, she did bring, sort of like a doll round before I had him, the midwife, but it weren't the same, it weren't the same because a doll isn't going to get as slippery as a baby does, so …'* (Gemma).

This contrasts the benefits of the peer support model as opposed to a more traditional expert or professional to patient relationship employed in the health service. As she identifies, the professional relationship can be bound by constraints, such as time and strict health and safety policies and procedures, but that the relationship with someone considered a peer, can be deeper and based on mutual experience and people have the time and space to be with each other. This can foster a positive learning experience for the less experienced mother and also helps to build her confidence and reducing her parental stress (Mead et al, 2001).

**Relationship with Statutory Services**

This comparison between statutory services and this charity is a theme throughout across the data from this organisation. Employees, volunteers and those who connected with the charity for support, all discussed why they thought Home-Start was different to Local Authority children's services. More specifically why Home-Start workers, whether in an employed or voluntary capacity, are different to social workers and Local Authority family support staff. I have concluded that the reason for this is three-fold.

First, unlike the other charities in this study, Home-Start offers support which is comparative to support offered by Local Authority children's services, which enables direct comparisons to be made. For example, outreach support from children's centres or family support workers implementing safeguarding plans following a social worker assessment. Related to this is the fact that three of the five people interviewed who connected with the charity for support, discussed how they had previously been involved with child safeguarding services and they drew comparisons between their experiences. Finally, and especially pertinent to the exploration of organisational identity, the central and enduring aim of this charity is befriending and creating supportive relationships based on mutual understandings of the challenges of parenting. Both employees in their interviews stated how they consciously framed the support they offered in a way which was distinctly different to statutory services, and articulated a desire to distance themselves from the associations, and connections people could make. As Mary describes here;

*'Yeah, yeah, it's the whole set up, the fact that we go into the family home, but without the official hat on and so we are not like social workers or health visitors, who are, you know, the official people, we are just friendly, helpful, support, without judging, without, you know, "you must do this, you must do the other' (Mary).*

Mary disassociates herself from the officialdom associated with the professionals she mentions and implies, through the counter narrative of how she approaches her work with families, that their approach is judgmental and coercive. Her use of the word *just* when she describes her *friendly, helpful support*, suggests that she thinks that other workers come with additional agendas. Inevitably this is the reality of health and social care interventions with families where professionals have statutory duties to perform and guidelines and procedures to adhere to. However, this separation of approach and how it is articulated is interesting in the context of understanding identity. A discourse about how they are different enables and compounds the organisation's distinction and provides a means to justify their role, in this case within the wider safeguarding and family support agenda.

As noted, this is also evident in the interviews with people who connect with the charity for support. Here, Lesley recognises that there is difference between her experience of being supported by a social worker and getting help from her Home-Start worker. She described how she listens more to the advice she receives from her charity worker;

*'{name of charity worker} she can say it and I'll listen, she's different. I don't know it must be the way she puts it so, but, the social workers were useless but they were nice, I can't say they weren't nice, they were great because I was quite honest, they were great with me, but they are so pushed for time and things, so I never saw them. I think because I've not been the greatest, because I didn't know whether I would feel, whether I'd want to go back on the drugs or wouldn't you know, I was different on me first child, so because I didn't, because I wasn't a big threat, you know, I think I never saw them, there was others with greater need than me, so yeah, so I think they couldn't wait to get me off the books' (Lesley).*

Lesley provides an example of the difference between her two experiences of support, which is communication, recognising that the charity worker communicates in a way with her that she feels more inclined to listen to. Whilst she does not offer a reason why she listens to her charity worker more, she goes on to make a connection between her relationship with social workers and time, or rather the lack of time, they afford her. Acknowledging that they did not categorise her as a priority, *there was others with greater need than me* and they did not visit her regularly, inevitably will have had an impact on her ability to build a relationship with them. The time limited way in which statutory services have to work, sets them apart from this charity. In contrast, time and perseverance are an important aspect of what Home-Start offers families, as described by Mary;

> *'In lots of ways, all the families, I feel like we are the continuous thread in it all. Social workers come and go, health visitors come and go, we just keep there and keep working with the family through all the issues that they have' (Mary).*

Here the metaphor of the thread represents the relationship built between Lesley and Mary. That it is a relationship built on support, which is family focused and family led, is not constrained by time and offered by someone who has experiential knowledge of parenting in that community. In Chapter Nine there will be a more detailed exploration of the relationships within this charity and how central they are to the social practices which form the basis of the support they offer.

To summarise, Home-Start is a charity that operates as an independent, locally funded organisation, which is affiliated to the larger umbrella organisation of Home-Start UK. Its central features are that it uses volunteers who themselves are parents, to engage and support families with children under five years of age, in their community. It adopts a whole family approach, which recognises that those seeking support are the experts in their lives and the issues they experience, and finds ways to work with them, with a view to helping to build self-esteem and self-efficacy. This charity offers services where there can be a direct comparison to Local Authority provided services, yet the data from this charity revealed that those who connect with the charity in different capacities, all articulate their distinction.

## Conclusion

This chapter has provided a descriptive exploration of the three charities in this study, with a focus on the way they represent themselves publicly and talk about what they do. Drawing on the theory of organisational identity as proposed by Albert and Whetton's (1985), it has used the data to reference and draw out what are described as central, enduring and distinct features of each charity's identity, since they were established. It has provided a rich description of the charities and their aims and how they position themselves in relation to public services. This provides a context for the following three chapters, which take a more analytical approach to the narrative data.

# Chapter Seven – Material Resources

### Material Resources

Resource mobilisation refers to all activities involved in acquiring new and additional resources for an organisation. It also involves making better use of, and maximising, existing resources (Seltzer, 2014). The acquisition, management and mobilisation of material resources is essential to all types of organisations and central to their ability to survive (Teresa and Yadesa, 2017). In every area of organisation, material resources play an indispensable role and if they are not managed effectively, an organisation's progress can be limited (Nkechi, 2014). For the charities in this study, examples of their material resources are the money they acquire from successful funding applications, or the donations they have received. It is the buildings in which they operate and the equipment they have acquired and use for their activities. Material resources are often the things that people can see and attribute to an organisation, which inevitably play a significant role in their identity formation, their practices and how they relate to other organisations, and arguably, how they ultimately survive.

A charity's access to material resources relies on many factors, and as RMT recognises and prompts researchers to analyse, the availability of resources is temporally and spatially contingent and there are patterns of resource inequality which affect organisations' survival (Edwards and McCarthy, 2004). RMT recognises that there are three sources of variation in resource availability; spatial, temporal and social. Drawing on the stories people tell about their connection to the charities, visual data and the public data each charity publishes, these patterns in resource availability will be discussed in relation to the material resources accessed by each charity in this study. Material resources are described as the most tangible resource,

because they can be easily observed and measured (Edwards and Gillham, 2013). For example, charities publish the amount of money they receive in a year via their public reports, or one can observe the type, location and size of offices they have. Indeed, this is what I considered initially, and this formed the basis of my early exploration of the material resources of the charities in the study. However, through the iterative process of data collection and analysis I became interested in a further layer of information in relation to material resources and specifically in relation to the buildings they operate from.

This chapter will begin by exploring organisational space. Initially it will briefly introduce literature relating to organisational spaces, which helped to inform the analysis of data that relates to the buildings and the artefacts of each charity. It will discuss how each charity communicates their identity through their buildings and the atmospheres created within them. It will consider the different ways each charity use their space in practice, and what can be learned from this to inform a wider understanding of their resource mobilisation and the impact this has on their ability to sustain their operations. Then, it will discuss money as a resource and focus on fundraising in relation to survival. Drawing predominantly on interview data, it will analyse each charity's fundraising strategies, drawing particular attention to how the need they hope to address, affects the methods they use to fundraise.

**Buildings as a Resource**

Having the right property to function from is a key asset for charities and forms a crucial part of how they operate and deliver services (Williams, 2014). For many charitable organisations, and specifically for the charities in this study, I have observed that their buildings are pivotal, not only as administrative centres, but also for delivering their frontline services. They are their organisational home. They are where their employees and volunteers meet, plan and deliver the majority of their work, where the wider public comes to seek their help and engage with their services. Buildings quite literally ground them in the communities they serve.

In 2014, a survey of 282 charities in the UK, hosted by the Charity Commission, revealed that 45 per cent of respondents stated that they thought property issues was the greatest risk to their long-term survival (Burne James, 2014). As this survey

data reveals, how an organisation acquires, produces and maintains an appropriate property is an important aspect when exploring their sustainability. The most obvious and tangible property risk is that a charity has to fold, because they are unable to afford and maintain a suitable base for their activities. But from a more nuanced, less drastic perspective, I argue in this chapter that property issues can relate to the organisational spaces created within the buildings and how the structure and dynamics of those spaces informs their organisational identity and affects their ability to mobilise further resources. Furthermore, that their spaces shape their organisational practices.

In response to the data, I became interested in developing the exploration of organisational spaces further. Although documenting basic information about the buildings and how they are maintained is necessary, and this is how this section will begin, I also consider how the charities utilise the spaces they have produced in much more detail. To discover if their spaces have the potential to influence human action in practice, either directly, indirectly, symbolically or because they evoke emotions (Ropo and Hoykinpuro, 2017).

In response to the photographic data and field notes, I began to analyse the symbolic and aesthetic arrangement of each charity's non-verbal artefacts (Carr and Hancock, 2009), such as furnishings, spaces within buildings and location of buildings. To consider whether these arrangements had the potential to shape action and affect interactions within an organisation. This prompted me to consider how space, in this context, intersects with power dynamics, affects relationships both within and outside the organisation and what can be learned from this to inform future practice, mobilisation of further resources and understanding sustainability. As the subsequent discussion will reveal, in my goal to produce knowledge in this area I chose to embrace an aesthetic, embodied epistemology, where personal, sensuous perceptions and attention to atmospheres is explored.

**Organisational Spaces in Literature**

The empirical data is the focus of this chapter, but the following section details some of the literature relating to organisational spaces and how this informed my analysis. Berg and Kreiner suggest that organisational buildings have been transformed "from

‘containers’ of organised behaviour to impelling symbols of corporate virtues and managerial intentions” (1992:43). As noted by Vaujany, et al (2013), more recently authors have recognised a ‘spatial turn’ in organisational studies and written about how organisational practice is embedded in space (Dale and Burrell, 2008). However, it is consistently acknowledged in the literature which does exist, that this remains a relatively under researched area of study within organisational theory as a whole. As Marrewijk and Yanow put it;

> *‘We note, with some curiosity, the lack of attention to spatial elements in organizational and management studies over the last few decades, given that every employee, student, patient, visitor or researcher entering an office, school, university or hospital experiences the material and concrete dimensions of built spaces’ (2010:2).*

Whilst I do draw on the literature that exists in the field of organisational studies, it is important to note that within third sector research and the social work research field, there is very little attention and exploration of organisations and space. Jeyasingham (2014) acknowledged this gap in social work research and notes, that which does exist is concerned with specific spaces where social work activities take place, such as the social worker’s car, or a service user’s home and generally has a focus on the impact of space on social workers and their practice (see also Ferguson, 2010). Critically, within third sector research I have been unable to find any research which looks specifically at the spaces in which charities operate and how this relates to their functioning and sustainability. In response to this, it has been necessary to draw on an eclectic mix of literature from various fields, such as social geography, philosophy and management studies to understand how buildings, as a material resource play an essential role on organisational development and practice. nA number of authors (Burrell and Dale, 2008, 2014, Jeyasingham, 2014, Ropo and Hoykinpuro, 2017 and Marrewijk and Yanow, 2010), have drawn and elaborated upon the work of French theorist, Henri Lefebvre when writing about space. His work, *The Production of Space* (1991) advanced the existing literature, which had focused on analysing space through language and discourse, but which neglected to recognise the process of production of space. He explored the material heterogeneity of space as a means to construct meaning, which he achieved through

his triadic concept (Ropo and Hoykinpuro, 2017), which describes space via three "Natures"; *conceived, perceived* and *lived* space.

The *conceived* nature of space relates to abstract plans and how space is represented and measured, for example, architectural plans, designer's drawings, maps or verbal representations of spaces. It is the 'deliberate constructions of space to embody certain conceptualisations', such as formality and functionality, which is actualised in material form through artifacts and building structures (Dale and Burrell, 2008:9). The *perceived* nature of space relates to the more practical use of space, the physical space itself, the environment which develops or is a result of everyday practices, such as offices for working, gyms for leisure time (Jeyasingham, 2014). They are the spaces that we know without knowing (Merleau-Ponty, 1962), through society's history and our embodied understanding of how certain spaces work for particular activities. Finally, the lived nature of space, which is experienced through the human body via sensations, memories and emotions and exists outside of verbal systems of communication. In this nature, the material and the cultural experience is combined and is the embodiment of space (Hernes et al, 2006)

Lefebvre's work recognises that all three natures are simultaneously valid and that in order to gain a greater understanding about a space, with a view to producing knowledge, the mental, the physical place and the social place need to be explored together, with consideration to how they intersect. He acknowledged that spaces are socially produced and simultaneously become productive via social practices and the perceptions of those who engage with them (Jeyasingham, 2014). That spaces are not immobile or a fixed phenomenon, but are dynamic and performative and can influence human responses (Ropo and Hoykinpuro, 2017). In relation to the analysis of charities, this is useful because their organisational spaces are not viewed as a cursory material resource, or simply as their dead office spaces which form a "stage setting" for their organisational activity. Rather, they are observed as being at the heart of their organisations and can provide a means to explore the meanings, values and beliefs of the group, which are embedded within their spaces and the artefacts within them. As Dale and Burrell put it, Lefebvre's construction of space theory provides 'conceptual tools for understanding the spatial politics of organisation' (2008:10)

While critics of his work have argued that it can only be a provisional theory, because it is too broad and does not provide universal categories which can be applied to varying contexts (Stanek, 2007), I recognised that it complimented the data I had produced in the field. My analysis revealed how I had naturally captured space in a way which was aligned with Lefebvre's theory, because I had articulated through my field notes the atmosphere, the emotions, the performative elements of the space, often much more than the material aspects, (though these were captured in the photographs I had produced). When reading and re reading my notes, it was clear that the embodied experience of those spaces had been important, and this was reflected in what I produced. I had unconsciously recorded the social aspects of the spaces, how they made research participants and myself feel, the atmospheres created in each one and how the buildings were an integral part of each charity's identity. Marrewijk and Yanow (2010:3) note, drawing on the work of Latour (1993), that if one considers human and non-human as separate realms from which to produce knowledge, one is 'imposing a binary *on* the world, that is not *in* the world', this resonated with me and informed how I chose to analyse and understand my data about the buildings as a key material resource.

**Overview of the Three Charity Buildings**

All three of the charities operate from buildings in which they have sole occupancy. As state funding has become more competitive and the demand for services offered by charities increases, many smaller organisations have struggled to acquire and maintain suitable offices (Charity Finance Group and Ethical Property Foundation, 2018). All three charities have achieved this in different ways, such as purchasing their own property, renting space from the Local Authority, or renting from a private landlord. All three spaces are key assets to the charities, because although they all do some outreach work in the community, their buildings are utilised for both their support activities and their administrative functioning. It is where their employees, volunteers and those who connect with their charity for help, come together.

All three have very different exterior appearances, which communicate their identity and offer an insight into how they utilise this resource. Even before entering the building, a certain tone is set. The *conceived* nature of the space is communicated through the design and layout of the exterior appearance. How we *perceive* the organisation and what it does, is evident in our social understandings of what constitutes different types of spaces and their different use. Finally, how we experience those buildings when we go inside, how they make us feel, impacts on how we interact with that organisation.

**Citizens Advice**

This charity's main office is a Georgian building, which is owned by the City Council and leased to them as part of their service level agreement. This charity has relied on funding and support from the city council and part of that has been the use of their office building at a reduced rental rate. A conversation with the manager of the charity revealed that the city council does not take any responsibility for the maintenance of the building internally, and that this has been a challenge for the organisation, especially because of the building's age. Despite this issue, access to this building is a key asset and it is available because of council support. The original lease was offered at a time when city councils would support charities by helping them to secure properties at a cheaper rate, therefore timing was crucial in acquiring this resource. It is an example of how resource redistribution occurred from councils to charities.

In keeping with this organisation's historical roots and its connection to the community, the office is in a city centre location, which is also the commercial centre and is easily accessible by public transport. Figure 7.1 shows the exterior of the building.

**Figure 7.1**


It has three floors, with numerous separate consultation rooms, an example of which is shown in Figure 7.2 There is one larger office space with four desks for staff, a staff kitchen and a meeting room. The entrance to the building leads into a reception/waiting area and access to anywhere else in the building is via a number coded, locked door, with the code only being shared with employees and volunteers.

**Figure 7.2**

**The Exterior and Reception**

Citizens Advice has a simple, minimalist, professional tone to the exterior design. There is very little explanation of what service the organisation provides, other than what is understood from their name and a very small poster about debt support,

which is too small to read without walking up to the entrance. The name of the organisation within their logo communicates that they provide advice for citizens, but there is no further explanation of the specific types of advice they offer, if it is free, or how people can contact them outside office hours.

This suggests that they rely on the national brand to be recognised and that there is an assumption that people know what they are and what they do. In relation to Lefebvre's theory and his *conceived* nature of space, this is the deliberate design of the building's exterior, to manufacture and articulate an organisational identity which is about professionalism. Given that this building was not purpose built and architecturally this space was not designed specifically for this organisation, they have to rely on the design of the exterior to construct an identity. There are no signs or identifying features to show that this is a volunteer led charity, indeed the outside of the building could be mistaken for a solicitor's office. It is clear that this is a work space, not a leisure space, and that the work has a formality to it. The design is minimal and office like.

The following interview extract details how someone who sought help from this charity acknowledged that she was not aware that this organisation was a charity. That she had preconceived ideas about how going to a charitable organisation feels and this organisation did not adhere to this;

> *'You see charity as a bit of a sanctuary, but that's not what you get when you come in, but that's fine because it is what it is. But it's not welcoming, I wouldn't use the word welcoming to describe it. It's not inviting' (Ana).*

Here she describes her experience of the building and her first impression of it, which mirrors the tone set by the design. She offers her idea of what charity means to her, which either relates to her direct, historical experience of a charity previously, or her cultural understanding of what a charity is. Her choice of the word sanctuary, evokes an image of a place where she might go to feel safe. She recognises that this is not what this charity offers, that the space did not make her feel welcomed, or that she did not feel invited, when she entered in need of help. Despite the distinction she articulates, she accepts the difference; it did not prevent her from seeking help.

However, one volunteer did express her concerns about the exterior of the building, and how the entrance could deter potential service users from engaging with the organisation;

> *'I've said lots of times that I think the entrance could be improved. I know it is difficult with money, but I don't think it is very welcoming, personally that is. I've always said that, and I've said that some people might feel intimidated. It's not easy to walk into a building and ask for help, it could be more welcoming, not as official, if you know what I mean?' (Andrea)*

Andrea articulates her views on the exterior and entrance to the building and that she thinks it could be improved, to make it more appealing to those who need help to enter it. She offers her view, but then clarifies that this is just her personal opinion, that the entrance does not fit with what she conceives to be a welcoming environment. By telling us that *it is not easy to walk in to a building and ask for help,* suggests that she has empathy for those who might struggle with this and feels the charity could improve this. Recognising this potential issue with the entrance, could be useful to the organisation when considering how they use this resource to effectively encourage more people to engage with their services. However, the formal tone could be a deliberate way to communicate the organisation's identity and the relationship they intend to develop between those who work for the charity and those who connect with it for support, as the next section will discuss.

**Space and Power**

Power has been defined as asymmetric control of resources, which enables those with power to control others' experiences, behaviour and outcomes (Magee & Galinsky, 2008). According to Boldry et al (1998) buildings are representations of control and power. That, unlike other forms of managerial control which are more obvious, buildings and their architectural forms and the placement of artefacts are implicitly connected to organisational control. That power relations can be obscured through everyday objects, and what could be considered spatial norms. As Burawoy notes, 'power is at its most salient when it is embedded, embodied and thus taken as natural (1985: 45). When considering organisational space and power, Dale and Burrell draw parallels between the work of Lefebvre and Foucault. They refer to

Foucault's 1977 work *Discipline and Punish*, in which he explores and analyses the macro-politics of factory workspaces and describes four elements, *enclosure, partitioning, classification and ranking,* and relate this to Lefebvre's 'representations of space'.

It was the analysis of the photograph in Figure 7.3 below, which prompted an interest in organisational space and power, and in particular the positioning of the desk and the artefacts on it, within the reception area. It is important in this context to acknowledge and describe the perspective the photograph was taken from. As discussed in the methodology chapter, the conceptualisation of the photograph is central to how we apprehend, analyse and interpret it (Tinkler, 2013). This picture (figure 7.3) was taken by myself, and as detailed in my field note, I had come to the organisation for a research interview. The photograph was taken on a mobile phone, whilst sat in the reception area. I was sitting on a plastic chair, which has a window directly behind it and was sat in a row of four other chairs.

**Figure 7.3**


This photograph illustrates that as people enter the reception/waiting area, it is the desk which confronts them first. It is large and takes up a significant percentage of the relatively small room. This desk, with its computer, telephone and papers creates an immediate association for anyone in the room with the act of working. Their personal, societal and historical understanding of which types of furniture and which technological artefacts are required to symbolise work, combines with their historical embodiment of previous work places (Dale and Burrell, 2008). In this same sense, they understand that this desk is not theirs, that it belongs to someone who is connected to the organisation, and in part they know this because the papers on the desk have the same logo and branding that represents the charity, and they relate this to the logo which they observed when entering the building. The branding acts as a flag, as a marker of objects and things which belong to that organisation.

Visitors, including myself, instinctively know not to sit at the desk and take a place on a chair opposite, despite the fact that the seat behind the desk is empty and it is the first seat which can be seen when walking through the door. As Yanow 1995 notes,

spatial learnings about how to behave in spaces begins in infancy, through embodied experiences of other spaces and how people behave. The reception set out in this way, is similar to other reception spaces people have experienced, such as doctors or hospital waiting rooms and therefore, visitors know to behave accordingly. Sophie, who visited the charity for support, mentioned this in her interview;

> *'It did feel like being in a doctor's waiting room. Actually, that's exactly what it felt like. Very quiet. Everybody pretending that everyone isn't there. That's what it was' (Sophie).*

Sophie, explains what it felt like to be in the reception and specifically compares it to sitting in a waiting room in a doctor's surgery. Her use of the words, *that's exactly what it felt like* clearly informs the listener that she has made that connection. She explains her analogy by describing how people do not engage with each other and pretend that they are the only ones in the room. What Sophie describes is that people conformed to a certain way of behaving, which Dale and Burrell (2008) would suggests relates to our cultural history of polite and disciplined behaviour in similar environments. We unconsciously read the layout and signals in the room and in response, behave in a way which we think is appropriate. In this instance, my experience of this room, which Sophie also eludes to, was to quietly take a seat in the chairs designated for people who are not working or volunteering for the organisation and wait to be spoken to and acknowledged. The way in which the organisation has ordered the space, means they are able to control people's behaviour, because control is embedded in the social enactment of the space. Those who enter the space engage in a system of norms and social expectations associated with coded spaces of this type.

Sophie went on to narrate a scenario she had experienced when she visited the charity for the first time, where this disciplined behaviour could be described as being disrupted, because another service user did not wait quietly;

*'Actually, the guy here last time, he did want to talk to the receptionist, he didn't want to talk to anyone else, but he did want to talk to her and I could tell he was irritating her, she just wanted to eat her lunch' (Sophie).*

The fact that Sophie chooses to add this scenario to her story and her use of the word *actually*, suggests that she thought this behaviour is contrary to what she felt is expected, or appropriate behaviour in this space. That by talking to the receptionist, the man was doing something which she would not have considered doing. She justifies this by suggesting that the receptionist shared her opinion and would rather be eating her lunch. This narrative led me to consider the desk in this context. It acts as a partition between those coming to the organisation for help, and those who work or volunteer there. It creates a barrier. When relating this to Foucault's theory of macro politics in workspaces (1997), this illustrates a clear example of partitioning, where individuals are specifically located to facilitate some interaction, whilst also preventing or minimising others. It is the receptionists place behind the desk, indeed in this spatial construction it is also behind a computer and a telephone, which separates those who work in the building and those who come for support.

This partition creates a particular type of relationship in a small, enclosed waiting space, because it promotes segregation and a sense that there is a them and us. It suggests that there are 'rightful and wrongful places for different categories of people' (Dale and Burrell, 2008: 53). One of the volunteer receptionists articulates this separation, during her interview, not in terms of space, but how she positions herself as different to those who come to the charity for support*;*

*'You get the, well, people are rough as a bear's bum in here to be honest. You never know who's coming through the door. If you get someone who's a bit bolshy, the fact that you are educated and held down a very good job means you know how to deal with them. You have sufficient authority to say, "I'm really sorry, I can't deal with you, if you come back when you don't stink of drink, then I'll deal with you' (Andrea).*

Andrea makes a clear separation between herself and the people who connect with the charity for support, even drawing an analogy with animals. Her use of the words,

*to be honest*, creates the impression that these are her true feelings, that she does not always share such thoughts, but in this interview situation she feels she can be *honest*. Perhaps because she feels that we are at a similar level of education, which as the next bit of her narrative shows, is important to her. She relates her ability to be able to deal with challenging behaviour to her level of education and previous career, telling us that she *held down a very good job*, which she believes has enabled her to deal with people who present with challenging behaviour. That her level of education gives her a sense of authority over others. Andrea chooses to demonstrate how she speaks to people in this scenario, by telling me what she would say. Her example shows that she is polite, but she is in charge and she articulates what it is she is unhappy with, in this instance a *stink of drink.* It provides another example of the separation which occurs in this charity. That those who work or volunteer there, are the keepers of the knowledge and can decide whether they share that or not. In this example Andrea is the gatekeeper to the advice on offer.

Of the three charities, this charity's building communicates work, there are no references to leisure or personal life. This is echoed in the comments made by the manager, who when asked about what makes the charity distinct from others, is that they have specific standards, they are a 'quality" establishment;

> *'What sits us apart from other voluntary organisations, I think is the quality of what we do. ……to be a Citizens Advice Bureau you have to follow the membership standards' (David)*

This separation from other charities, which echoes Andrea's comments, centres around professionalism, quality and meeting defined standards. As detailed in Chapter Six, for them, this is fundamental to their organisational identity. The charity relies on this identity, which impacts on the way it's building appears both on the outside and inside. This charity uses their building resource to attract people to engage with their service and they rely on reputation, location and what they consider to be a known set of standards.

**CancerCare**

CancerCare operates from a large, detached Victorian house, surrounded by an expansive garden and driveway (Figure 7.4). The charity owns the property, which demonstrates that they were able to aggregate and access monetary resources to purchase this resource. Similar to Citizens Advice, time is a significant factor in being able to access this, because it was at a time when properties were cheaper; a small charity setting up now, may struggle to afford such a property. It is located outside the city centre in a residential area, which is accessible by bus, but is not close to the train station. Most people arrive by car or in the charity's van. Anyone can walk in to the building and on entering there are signs by the door asking visitors to sign in.

**Figure 7.4**

It has three floors and is organised like a home, with a kitchen and a dining room (Figure 7.5), and what would be used in a family home as bedrooms, are used as consultation rooms for massages and counselling. The administrative office is also upstairs (which is only accessible to employees or volunteers) and the attic has been used as a special activity, or group room, for children and their families.

**Figure 7.5**

CancerCare has the least branding and information about their service on or outside the building of all the charities studied. There is a sign at the bottom of the drive to identify the charity, but other than this, it would be easy to assume it is a residential home or even a country house hotel. This is not a building people would visit unless they were invited or referred to attend it, and the fact that it is not visible from the road and is accessed by a long drive, creates the feeling of entering a private club or retreat. This echoes a comment from a woman who had sought help from the charity;

> *'I've got relationships with people in this building that I would never have had and for me it's, you know, it brings lots of people together. You, we are, we are just a part of a horrible club that nobody wants to be a member of to be quite honest' (Jane).*

Jane recognises that a diagnosis of cancer and her involvement with the charity has meant that she has made new relationships, which initially she frames as being positive. She has had the opportunity to meet people she perhaps would not have met ordinarily. She talks about the building as somewhere where those relationships develop and where people come together. Her description of it being *a horrible club* brings us back to the reality of how and why they have been drawn together. The way she corrects herself when she brings me in with the use of the word 'you', but then immediately changes that to 'we', meaning the other people she has met and

repeats it. This underlines that as someone who has not been diagnosed with cancer, I cannot be part of the club.

The narrative articulates a sense of togetherness, that a diagnosis brings, but also separation from others. The location, appearance and detachment of the building perpetuates this sense of a space which is aimed at a particular group. My experience of visiting the building as an outsider, as someone who is not a member of the club, is that it attempts to provide an antidote to the "horribleness" of what constitutes club membership. The well-kept gardens provides a place of calm to walk through before entering the building, its detachment from the busy road and city offers a sense of peaceful sanctuary and the homely exterior separates it from any associations with buildings usually related with cancer, such as hospitals. One of the volunteers who greets people when they come to the charity articulates distinction from a hospital building in narrative form;

> *'I think it's away from the clinical, hospital environment really. That makes people feel better. You can see people when they come in, maybe if it's their first visit, or if they have come for an assessment and they don't know what it is about. And they are all a bit nervous and whatever and afterwards and they are getting their coat on and ringing their friends to get them to pick them up and they are lingering for a few minutes, "ooh I did enjoy that, I didn't think I would, but I did." Well, how many people say, well I did enjoy that when I am leaving hospital? They don't do they? It's a different approach to it, I think, this place is different' (Shirley).*

Shirley's words prompt the listener to consider the comparison between the two spaces (or environments as she puts it) and highlights how some people make that association when they come to the building for the first time. She tells the story of how people enter feeling nervous and leave feeling a sense of enjoyment. Using direct speech, as a dramatised version of what happened, she pulls the listener into that narrative moment, to build credibility. That it is not just what she thinks, but by telling it through the performed words of others, that it must be the view of others too. She talks with a fondness and pride that "they", as she describes the people who connect with the charity for support, enjoyed their time in the space where she

volunteers. She reaffirms the difference she has identified by asking me, as the listener/audience, whether I have heard people say that they have enjoyed being in hospital. Having used the direct speech technique to persuade me of her opinion, she uses rhetorical questions to influence mine. *Well, how many people say, well I did enjoy that when I am leaving hospital? They don't do they?* She concludes the story by explaining why she thinks it is different, which is about approach.

The conceived nature of this space marries well with the organisation's aims to support people affected by cancer and how their service compliments those provided by the NHS, yet identifies as being distinct from it. For example, the building looks residential rather than institutional like a hospital and the lack of obvious identity from the outside and private location, offers a level of confidentiality which is synonymous with medical services. However, this makes the perceived nature of the space confusing and ambiguous. It prompts one to consider when visiting, whether this is a medical institution for healing patients, or is it somewhere where people come for leisure and wellbeing. There is a juxtaposition between the medicalised identity, which is intrinsic because it is a place where people gather because they share a medical diagnosis, with a social identity where people come to meet and feel supported. Gemma describes one of the spaces in their building and again relates it to institutional spaces, such as the hospital or a classroom;

> *'I have been up to the loft, where the play therapy is, not for me, but for when my mother in law was diagnosed with terminal cancer. Lots of young children in the family and I kinda went on behalf of everybody else and again that is purpose built, with bean bags and toys and painting and play dough and all the things that children like. And it's a cosy place, like a tree house almost, but special. Again, it's not a clinical classroom with a box of toys in the corner, which you might find in a hospital room, you know it's a proper spot' (Gemma).*

Gemma lists all the things the charity has put in the room to signify that it is a place for play and to encourage those in the room to feel comfortable, warm and relaxed. She makes the analogy of it being like a tree house, which creates an image of a place where children can go, to hide away and as she says, feel cosy. Like Shirley,

she uses the word clinical to describe what it is not, suggesting that there is a shared narrative which is about distancing the organisation from any connection of a clinical environment. Thus, the narratives and visual data provide a useful insight into how material resources in the form of a building are related to the organisations' identity and how those connected to them read and understand those spaces and respond to them.

Gemma, also provides an additional and emotional description of CancerCare's space;

> *'This is a space where people can just come and be and they can cry and they can shout and swear and whatever else they need to do and be vulnerable and be themselves, so I think being able to do that actually probably makes people stronger to fight the illness on the outside as well' (Gemma).*

She articulates its importance within the support offered at this charity. Her description highlights how entering the building (and the "club") can prompt a release of emotions, which she perceives to be positive, because it enables the person to feel stronger when they leave. That by allowing herself to show her vulnerabilities in this space, she develops a sense of strength when away from the space and from others who share her experience. This narrative is a powerful example of how spaces are integral in the process of addressing the needs of those who seek help from a charity.

**Home-Start**

Home-Start operates from a building that has previously been used as a small shop and is located centrally within the town, but on a residential street rather than the commercial centre. It is rented from a private landlord (figure 7.6).

**Figure 7.6**


It has two floors, with the ground floor being used as an office, which leads to a kitchen and then a bathroom and the upstairs is a group room ( Figure 7.7), with a small kitchen area. There is not a reception or formal entrance, one can walk from the street straight in to the ground floor room. All the areas are open, there are no specific spaces just for staff or volunteers.

**Figure 7.7**

In contrast to Citizen's Advice, Home-Start fills their windows with lots of information about what they do, who they support and how they use and need volunteers. They use both words and pictures to communicate this, in an informal, rather chatty tone. These are the words on the window, to the right of the door (see Figure 7.6),

*If you know about being a parent and can volunteer a few hours each week to help a local family*

●

*You could become a Home-Start volunteer*

●

*For more information call in during office hours or phone* *******

These few sentences articulate almost everything one needs to know about this organisation, that it supports local families, using volunteers who are either parents or have experience of parenting, and that those volunteers will offer a couple of hours per week of time to families in need. Furthermore, the pictures of adults playing with small children provides an insight into the look of their support services. The organisational aim to support and befriend families is clearly communicated in the centre of the entrance. A clear glass frontage enables the viewer to see into the building, to observe what happens inside and demystifies (literally) the activities which happen in that organisation. Home-Start wears its heart on its windows; it is transparent.

Dale and Burrell note that in recent years there has been a deliberate move within work space design to achieve particular values and goals, via the use of spatial design and manipulation of space. That spatial politics are used to "capture hearts and minds", to manufacture organisational identity and culture (2008:9). The charity utilises this material resource to advertise their work, to recruit volunteers and raise their profile within their community. It is a conscious spatial construction, which places their aims and values at the forefront of a presence, with a view to inspire human action in the form of volunteering.

**Flexible use of Space**

The exterior of Home Start's building looks like a shop and the large windows at the front of the reception space continues this association when inside the building. The ground floor is set up like an office, with a desk and a computer, although in this charity the desk is facing a side wall, meaning that there is less of a sense of there is a 'group space' (Figure 7.8).

**Figure 7.8**


The following field note om the group spaces was written whilst waiting for a research participant to arrive;

***Date: Tuesday 9th May 2017***
***Time: 9:15am***

*'The upstairs room is where they have groups and meetings. It is a strange room, which has a mix match of furniture. Part of it looks like a nursery with toys and brightly coloured pictures aimed at children. Then there is a large meeting table folded away against the wall, with plastic chairs stacked by the door. But there are also some kitchen units and four comfy chairs around a coffee table in the corner, which is where I have decided to sit. I think it will be better for my interview, less formal.*

*The room is bright and maybe it is all the toys and kids stuff, but there is a positive energy to the room. I can imagine that children, especially toddlers like coming here. There is so much to read and see on the walls, from pictures drawn by kids, to health and safety notices about hot water and a poster with the logo of the one organisations which fund the charity. Nothing matches, apart from two comfy chairs, which look like they have come from an old people's home.'*

What this narrative conveys, and the photograph illustrates, is one room which is the space for a range of activities and information sharing. All the different objects and signs relate to the different uses of this space, for example toys for playing, comfy seats for socialising, a kitchen for preparing food and drinks, a table for meetings or learning. The charity makes use of the relatively small space they have and make it multifunctional. A family and intergenerational focus is represented by the space and particularly the artefacts in it. For example, toys associated with children and play, next to meeting tables associated with adults and work. This dual purpose, across generations, was evident in the narratives from people who connect with this charity for support;

*'It's good for us to get out. He plays with the toys, while I have a brew with the others' (Laura).*

The informality of the space allows for socialising and play and enables the charity to support groups of people, in addition to the home visiting. It provides a space for people being supported by the charity, to get out of the house and interact with others and that the space is appropriate for both a child and an adult to socialise effectively. That she can have a drink with other mothers and her child can play with the toys.

The resources in this room are accessed from many different sources, as the manager describes;

> *'Yeah, we don't have lots of money to buy stuff, so these chairs were given to us, can't remember where they were from now. Lots of volunteers donate toys from when their kids were little, and we just have to keep renewing them. One of the students, from your uni actually, she painted that picture on the wall. We use what we can really' (Jane).*

Because of a lack of financial resources, they must find alternative ways to acquire furniture and other resources required to provide family support. The fact that she cannot remember where the chairs are from, suggests that people connected to the charity offer things and they accept what they can on an ad hoc basis. That their human resources, in response to a need, offer material resources.

**Money as a Resource**

Money is the most fungible resource explored in this research and I would argue is the resource which most people identify as having a significant impact on a charity's survival. Securing and maintaining funding is vital for charities, because they are not able to function on good will alone. All three charities in this study, require funding to put their mission in to practice. Funding pays for their staff, their buildings and other resources, which are necessary to them. Data from the Charities Aid Foundation, which surveyed 427 charity leaders revealed 57% stated that 'generating more income and achieving financial sustainability' was the biggest challenge they faced in sustaining their charity's operations over the next year (Charities Aid Foundation, 2017). All three charities in this study have maintained adequate funding levels to sustain their services, but each adopt different approaches to fundraising.

**Fundraising**

Fundraising is a complex process. Even the worthiest cause is not able to attract donations without organised and concerted effort (Breeze, 2017). Worth (2016) recognises that there are many aspects to charity fundraising which include; defining the needs that a charity hopes to meet, cultivating the interest and involvement of potential donors, ensuring that their intentions when donating money matches the needs and aims of the charity, the process of soliciting of the donation and finally, providing feedback on how their donation has been used.

As detailed in Chapter Two, cuts to Local Authority budgets and greater competition for resources, means to achieve financial sustainability, charities must find innovative and attractive ways to raise funds. Furthermore, this is in tandem with developments in social media, which puts them under greater scrutiny, especially in how they manage their spending. Fundraising is often overlooked in the literature on charitable giving, with the focus being on why people donate (Breeze, 2017). Breeze suggests that this is because there is a cultural preference to interpret generosity as an innate, private decision which involves people responding to needs. That, 'instinctive kindness' is valued more than reacting to a request for money (2017:8). However, this is rarely the case when people donate, and fundraising is a vital element of a charity's activity and crucial to their survival (Silber, 2012).

Despite its importance, what became apparent when analysing the empirical data, is that although generating funds is an integral aspect of what a charity must do to survive, very few research participants engaged in discussions about it. Those who connected with the charity for support, were more focused on narrating their stories of being helped, perhaps because they connect fundraising to the employees and not something which concerns them. The only charity out of the three, where people who were accessing support from their charity mentioned funding, was CancerCare, which reflects their fundraising strategy, where individual donations are the greatest source of funding.

**CancerCare**

CancerCare has a diverse income stream, with a focus on local fundraising rather than the procurement of Local Authority funding or acquisition of large grants from funding bodies. As they state on the website;

> *'It costs almost £1million to provide our free services and we raise 80% of our costs through fundraising and donations from the local community.'*
>
> *(*CancerCare, 2018)

Their use of the word local reflects their identity (as discussed in the previous chapter), where providing a service for local people is a central feature and makes them distinct from national charities. Whilst all three charities in this study use the money they raise to help local projects, the national profile of the other two charities makes that more ambiguous. CancerCare celebrate and highlight that they are a local charity and that the money they raise will go directly back into the community, as detailed in this request for donations from their website (Figure 7.9).

**Figure 7.9**


Breeze (2013) explores how donors choose charities, and acknowledges that people favour those they can identify with, which support causes that relate to their own life experiences. This was echoed in my research data for CancerCare;

> *'I think people see that it's a good charity and that it helps people round here. I think people think, maybe I'll need to go there one day. I mean cancer can affect everyone. They say it doesn't discriminate don't they, on these adverts*

*and stuff, and its right. So, that's why I think people fundraise for here' (Jenny).*

Jenny describes how she thinks other people view the charity and that they will appreciate its community focus. She imagines and articulates other people's thought processes, to explain how others can relate to it, *maybe I'll need to go there one day.* Also important is that it is a *good charity*, suggesting that there are bad charities that may not be worthy of financial support, perhaps referencing recent fundraising scandals. Hart (2016) discusses the connection with donors and localism and recognises that people like to see where their money is being used. Furthermore, that by being part of the same community, they may be in direct contact with those who have been supported, or as Jenny articulates, result in them being a beneficiary in the future.

Lottie, who has also been helped by the charity when she was diagnosed with breast cancer, provides an insight into why she engaged in fundraising activities for the charity;

*'CancerCare are not funded by any source, it's purely the good nature of people. I think they get legacies, but obviously treatments are expensive, cos you know, they have to pay for so many different areas, just my treatment alone would have cost so much, which is why I fundraise for them' (Lottie).*

She recognises that this charity does not have one main organisation which funds them, such as the NHS or local government, but that they aggregate funds from different people. Her use of the words, *the good nature of people*, describes how this charity relies on the charity fundraisers seeking money and appealing to people's kind spirit and inspiring generosity in others. Lottie describes an interesting feature of CancerCare's fundraising activities, and a key element of how they appeal to people's *good nature*, which is that people who have been supported by the charity, become fundraisers. They make the practice of asking for money, personal. Lottie describes how she makes a direct connection between how much it has cost the charity to support her, which encourages her to fundraise in return. She wants to

give something back in response to the help she received. This was echoed by others;

> *'Yeah, and I think that's why people like CancerCare, why they do so well from a fundraising point of view, because people want to give back, because they recognise what they've had is quite special. I dread to think what I've cost them in general, hence why I fundraise for them because you know, to me it's vital, it's so vital' (Jenny).*

Jenny is conscious that the support she received for free, requires sustained funding. Her use of the words, *I dread to think what I've cost them,* suggests that she has considered how much the support she received cost the charity, and she would like to repay some of that by fundraising. She is also compelled to fundraise because of how important the support she received was for her, she describes it as vital. She even repeats this to emphasise the point. Both Jenny and Lottie have direct experience of the service they provide and the impact it can have. As fundraisers they are well equipped to deliver one of the important aspects of fundraising as proposed by Worth (2016), which is being able to define the needs of the organisation. They personify those needs, they are able to tell potential donors, from personal experience, how the charity has helped them and met their needs.

This personal connection with fundraisers means they are also well placed to cultivate the interest and involvement of possible donors (Worth, 2016). For many people who have been helped by CancerCare, and then become voluntary fundraisers, they will have a network of friends and family around them, who by their association, are interested in the charity and how it has helped someone close to them. It is more likely that they will then donate, or also engage in fundraising activities. This was a feature of Lottie's experience. She, and others she had met at CancerCare arranged a Ball to raise funds for the charity;

> *'The Ball was just great. You know, everyone had friends and family there, all dressed up, we had such a laugh and raised loads' (Lottie).*

Lottie, and others, were able to utilise the support of family and friends to raise money, because their personal connection, enables an understanding of the charitable cause.  Lottie describes how her family and friends came together at a special event where they could get dressed up and have fun together, but with the purpose to raise money for the charity which has helped her. By being related or a friend of Lottie, potential donors at the Ball have an insight into how their money could be used in the future, because they have seen the impact it has had on her she has told them about it. As Breeze (2013) notes, charities which fundraise successfully, utilise all available resources, including their beneficiaries as human resources, because they can draw on and influence their personal networks to motivate people to donate. This is not just beneficial to the charity, but as both Jenny and Lottie's narratives suggest, it can also help the volunteer fundraiser because they want to *give something back*. Fundraising can meet the needs of all in the donor, gift relationship, because it can give voice and provide a positive experience for the fundraiser also (Alborough, 2019). It helps Jenny and Lottie to feel better, when they think about how much their support has cost.

CancerCare was the only charity in the study which had a dedicated fundraising team. This is unsurprising given that they aggregate the majority of their funds from donations, rather than large grants. They need to consistently fundraise as a regular task, rather than periodically at the end of funding cycles, which is the case for organisations which apply for large grants. Unlike the other two charities, a significant proportion of their website and marketing material is dedicated to fundraising and they provide detailed information about how members of the public can fundraise for them, as seen in Figure 7.10.

**Figure 7.10**


The charity utilises their social media platforms to provide quick links, which enable effective solicitation of donations. They also produce a fundraising pack that can be downloaded, which provides examples of fundraising ideas, a step by step guide to creating an online fundraising page, tips on how to promote any activities and how, as an organisation, they will provide support and assistance. The figure below (Figure 7.11) is taken from this pack and details how their fundraising team will support potential fundraisers.

**Figure 7.11**

## WHAT YOU CAN EXPECT FROM US

- We can provide you with CancerCare balloons, CancerCare leaflets, sponsor forms and can loan you collection tins, collection buckets and banners depending on your requirements.
- We'll introduce you to a dedicated member of our CancerCare Fundraising Team who will be on hand to support you and answer any questions you might have. Unfortunately, as a small charity, we cannot guarantee that a member of the CancerCare Fundraising Team will be able to attend your event, but we will always discuss your wishes with you prior to the event date.
- We can give you an electronic copy of CancerCare's logo to use on your promotional materials, as well as our Registered Charity Number. Please be aware that it is your responsibility to ensure that the charity receives all money raised in aid of CancerCare from your fundraising activities.
- We can provide you with a template for creating your own posters/flyers to promote your fundraising, but regretfully are unable to undertake design work or printing for you.
- We unfortunately cannot provide raffle/auction prizes for your fundraising event, but we can give you a signed letter of authority so that you can approach other individuals and businesses to ask for donations of prizes. As CancerCare have built up relationships with some local businesses who kindly support various fundraising events throughout the year, we ask that you keep the CancerCare Fundraising Team informed about which businesses you intend to approach so that we can make sure we are not asking the same people.

They work hard to break down any barriers to fundraising, ensuring the process is facilitated by dedicated staff. By encouraging and supporting volunteers to fundraise on their behalf, they are mobilising human resources to gain material resources effectively.

**Citizens Advice**

In contrast to CancerCare, this charity does not have a dedicated fundraising team. The difference in how the two charities approach fundraising, was articulated in an interview with a trustee from Citizen's Advice. Barry articulates that in his opinion, the need that a charity aims to address and the perception of those who seek help from

them, has an impact on fundraising strategies and how this compares to other charities;

> *'CAB doesn't have a professional fundraising team. Depending on your point of view of the world, the CAB as an organisation, they just support work shy, lazy individuals who don't give a damn and should get up off their arse and get a job. So, there is no way, there's no way you could fundraise for CAB. You could, but it isn't the same thing. {Name of local Hospice}, really is about the story, my brother had cancer and they went there, my mother was there. CAB depending on your point of view, you should go out and get a bloomin job and not come for benefits advice. So, this organisation operates in a tougher environment, even though their numbers are much much bigger. CAB doesn't have to find 70%, most of its costs are covered, with grants and stuff like that' (Barry).*

Through his descriptions of how some people negatively judge those who access the charity, his words such as *work shy* and *lazy*, he articulates how Citizens Advice are unable to access public support. This notion that people make decisions about donations based on personal choice which, as Barry puts it, is based on their *view of the world,* was highlighted in research into why people choose to donate to certain charities. Donor choices are taste driven, not needs driven and people make decisions based on their individual preferences and a desire to help people they have an affinity with (Breeze, 2013). This reflects Barry's view, who offers an example of a charity which people may have an affinity with, a hospice.

Barry suggests that people make assumptions about the types of people who access support from Citizens Advice and uses the description of *work sh*y and *lazy*; These are not people 'like us' as with CancerCare. The words used reflect the rhetoric of politicians, when justifying reduced funding for public services and the promotion of the Big Society agenda. It creates a distinction between people deemed worthy or not worthy of help.

Whilst this perception of those who receive support from Citizens Advice could be a barrier to accessing funds from private donations, it also makes them eligible to

access public funds and apply for larger grants, which are often targeted at helping vulnerable people[1]. Recognising that there are charities which meet needs. That are not well supported by private donors, local authorities and trusts fill this gap. At the time of collecting data for this charity, they were predominantly funded by the city council and had recently successfully bid for a grant from the charity Comic Relief;

> *'Our core support is provided by the city council, has been for ages, but we've had to widen the net for money for projects. I've been going up and down to London to meet with Comic Relief to get this recent money. It will be good, it's just different for us' (Dave).*

This shows how this charity has historically, and continues to be, supported by its local council and that this enables them to offer their core service of providing free advice. Dave's account also highlights how they have recently had to diversify their income stream, by applying to other types of funding organisations. He talks about having to make trips to London, a significant distance from their office, to meet with representatives from a large national charity in order to develop a relationship with them. This is an example of what is described as co-optation/appropriation in the RMT literature, which involves accessing and utilising resources from other, existing organisations, with the tacit understanding that those resources will be used in mutually agreeable ways. The way he says that he has been *up and down to London to get the money,* demonstrates how much time and effort is required to access funds in this way, which will be in addition to the writing of the bid. It highlights an important part of the co-optation process, which is the large organisation developing a relationship with the charity seeking money, to ensure that anything they give will be used in accordance with their aims and objectives and utilised effectively. What is also relevant in relation to the theory, is how the meetings for the national charity are

[1] The organization who funds Citizens Advice, Comic Relief, specifically state on their website and marketing information that, 'When you donate to Comic Relief or Sport Relief, you're supporting vulnerable people and communities in the UK and internationally. Our vision is to create a just world free from poverty and we're doing this by funding amazing organisations doing amazing thins" (Comic Relief, 2019)

held in the capital, which highlights the in equality in spatial distribution of resources and how many of the larger national funding bodies are based in the capital. The time and expense it takes for a charity based in the North West of England to attend meetings is far greater than those based in the South West.

A trustee described his opinion on how this charity should strategically diversify its income and explore ways of generating income;

> *'One of the things I have tried to change as a trustee is to say, don't be so passive. So, I was thinking about income generation, there are so many skills here, do a training programme, start to earn money so you don't need to ask for as much money and you can say to people, look, we are generating our own income. These are the best people in this district in terms of advice giving, you know, their quality levels are up here, nobody can match them. They have so much to offer in terms of training smaller organisations' (Barry).*

Barry has recognised that the charity could take a more proactive approach to fundraising. He has tried to change their approach, "*don't be so passive"*. He chooses to tell this story by telling us what he said, presumably in a trustee meeting, for example, *do a training programme.* He recognises the resources that this organisation has, which they apparently do not recognise themselves.

Barry recognises that staff and volunteers at Citizens Advice have expertise, which could be harnessed to access a different type of funding and that uses the human resource they already have. This is a similar strategy to Cancer Care, using human resources to gain material resources, but takes a different approach, which reflects the different need and group of people they help. CancerCare utilise their volunteers to generate income which is underpinned by emotions and appealing to people's generosity based on affinity and social networks. Citizens Advice, in keeping with their organisational identity, take a more business-like approach and rely on their skills and expertise as people who hold knowledge to generate additional funds. Home-Start take an approach which contains elements of both approaches.

**Home-Start**

> *We used to get funding from {county name}, then it came through the Children's Centre, but now all that's stopped. It was looking very worrying for a while, but then {Name of Trustee} got money from the Lottery and that is funding us for the next three years. It really was a big relief when that came through' (Barbara).*

As Barbara, a charity employee explains, this Home-Start scheme was originally funded by the Local Authority. The management of this funding was then tasked to a Children's Centre, who became gate keepers of the funds, as Barbara says, *it*, meaning money, *came through the Children's Centre*. When the Children's Centre's funding was reduced, they were unable to fund other organisations to deliver services in partnership with them, which is why this charity had to look to different funding bodies for support. Barbara articulates how the end of this funding had a significant impact and she worried about the survival of the charity at that time. This highlights a precarious position which has emotional impact.

Peter is responsible for applying for funding for this charity is a trustee, who gets paid to take on this additional role;

> *'Well, I'm a trustee, but I also do fundraising for them. They pay me, well, it's not much, just for what I do really. I'm semi-retired, so it's not about the money really. I do funding applications and the reports and keep up to date with what pots of money are out there' (Peter).*

Peter states that *it is not about the money,* which he states in relation to him getting paid *not much* to fundraise, however it is about him giving his time to access money. He is using getting money as a way of gifting for survival. He as their human resource, help to access material resources. Drawing on the skills and expertise as a trustee to fundraise, means the employed staff can focus on delivering frontline support; it separates fundraising and service provision. This would become problematic if this trustee resigned, because he may not be replaced on the trustee board by someone with fundraising skills, or the budget assigned for a fundraiser

and the temporary basis of the role, may not be sufficient to attract a future employee.

Peter's use of the *phrase pots of money*, which he describes as being *out there*, creates a sense of how he searches for potential sources of funding and then applies to gain access to those pots. Home-Start are currently primarily funded by the Lottery, which covers their core costs, but they also apply for smaller amounts to pay for specific projects. Barbara discussed this when she talked about a project which was funded by a local bank. This was a smaller amount of money, which was not for core costs, but enabled them to help isolated families learn about cooking, nutrition and to socialise whilst cooking and eating together;

> *'We've recently started Cook and Eat. So, we've just had six sessions of Cook and Eat and so part of our funding, we've got to, tackle isolated families, so we had eight families do the Cook and Eat with us for six weeks. The families we hand- picked, by us as staff, but the families didn't know that. We opened it up, obviously, to everybody, but for our funding from the bank, we had to have certain families come, which we did, so we're hoping to run it again' (Barbara).*

This is an example of where this charity must meet the different criteria imposed by the various funds they have applied to and exemplifies the challenge of diversifying funding applications, because of cuts in Local Authority funding. It requires time and effort to ensure criteria are met and evidenced. Pharoah et al, (2014) researched small charities in the North East that had endured cuts in public money. They identified that diversifying funding, to include smaller grants from different funders, is useful because it spreads the risk (not putting all one's eggs in one basket), but that it can stretch funding resources and can impact on service delivery.

Home-Start do seek private donations from the public and engage in fundraising activities which encourage this. However, this is run entirely by volunteers and on a much smaller scale to CancerCare. Their fundraising team comprises of three women, who have volunteered for the charity for over fifteen years and are described as the Golden Girls;

*'I've volunteered for Home-Start for years. I just did family support at first and looked after lots of families. I still do that, but now me, {name} and {name} also have a little group to raise money. They call us the Golden Girls, I think {name of Trustee} started that, anyway, that's what they call us. We are all over seventy (Laughs). We've done all sorts, like collecting in supermarkets, jumble sales. I like it cos they use the money we make, for the Christmas party or the summer trip' (Maureen).*

This is a further example of how a charity uses their human resource to access material resources. Maureen's experience of being involved with the charity over a long period of time, as she says, she has *volunteered for Home-Start for years*, means that she has a good understanding of the charity's aims. She tells us that she is a family support workers, therefore she has experiential knowledge of how they operate and why they need additional funds. As a volunteer family support worker, she has direct experience of the needs of the families and the impact the charity can have, which makes her an ideal person to go into the community and ask for funds.

The name which has been assigned to the women provides an insight into their role within the charity and how they are viewed. They are not given a professional title, such as the fundraising team, or committee, but rather a more affectionate title, which evokes an image of older ladies socialising together, in a comedic fashion. Maureen states how she appreciates that the money they raise pays for special events for the families connected to the charity. This inspires them to raise money, because they can see the impact it has and feel satisfied that their efforts have enabled families to enjoy a party or trip. Their contribution adds to the support offered to families and provides treats, which may be more difficult to justify when applying to formal funds and trusts. They support the charity and can see the impact they have through their involvement.

**Chapter Conclusion**

This chapter has focused on the material resources associated with each charity. Looking specifically at buildings and money, it has adopted a RMT theoretical lens, to analyse the narrative and visual data. It has explored how the charities access

resources and whether they are aggregated or self-produced and considered the spatial, temporal and social inequality variations in resource availability.

My analysis of organisational buildings has led me to conclude that spaces are pivotal to a charity's identity. I have observed that an organisation's material resource simultaneously informs their identity, but also their identity informs how they utilise and organise their space. This is evident in where their buildings are located, the design of the interior, and how they are internally organised. Relationships and practice are influenced by the design and layout of buildings and rooms, as was evidenced in the reception area at Citizens Advice and the group room at Home Start. I recognize that organisational spaces can influence how people feel when they connect with a charity for support or work. As Dale and Burrell suggest the data has shown, materiality in spaces both communicates and shapes, that whilst it consists of physical structures, it is part of the "inter-subjective and subjective realms" that make up our social relations and that the places and spaces around us construct us as we construct them (2008:1).

This chapter has discussed how the charities adopt a fundraising strategy, to ensure that they access and mobilise money as a material resource, which pays for staff wages, enables the recruitment and training of volunteers and provides resources required to fulfil their aim. Reflecting the findings relating to buildings as a resource, organisational identity and the need which the charity aims to address, are important factors in how monetary resources are accessed and fundraised in practice. CancerCare rely on funding from private donations, which means the practice of fundraising is a regular, consistent activity in this organisation and a professional team take the lead. They endeavour to appeal to funders by celebrating that they are a local charity which helps local people and that the need which they fulfil, is something which could affect anyone. They also draw on the desire of those who have had support from them to "give something back" and mobilise this human resource to fundraise on their behalf and engage with their social networks.

Citizens Advice's fundraising strategy is very different, because they rely on funding from the City Council and another national charity. Data from this charity revealed that accessing private donations for their service is challenging, because people may

feel they have less affinity with those who they support, or that there is prejudice about which people in society are more deserving of financial support from members of the public. From a different perspective this does make them eligible for grants, where money is targeted to reach the most vulnerable in society. The responsibility for fundraising falls to their charity manager, who develops relationships with funders and dedicates time to liaising with them. However, at the local level a potential future funding opportunity is that they would generate their own money by offering and charging for training to other organisations. That they could use their identity, which centres around their quality of service and professionalism to enhance the funding they receive and makes them more proactive and in control of generating income.

Home Start relies on their volunteers to deliver their fundraising strategy. Although they pay a small amount of money to a trustee to fundraise on their behalf, the role happens on an ad hoc basis and is specific to the person currently undertaking it and their personal circumstances. Having lost their core funding from the Local Authority, they now apply for grants from other large charities to cover their core costs and apply for separate, often smaller amounts of money, from a range of different funders, such as their local bank. This enables them to deliver specific projects, which compliments their key aim of offering family support. In addition, a small group of volunteers, engage in fundraising activities to pay for additional events, such as a trip. Their significant experience of being volunteers and understanding the aims and impact of the organisation prompts them to raise this additional money which goes direct to the families in the form of a treat.

# Chapter Eight – Human Resources

## Introduction

Resource Mobilisation Theory (RMT) as discussed in Chapter Three, categorises humans and the labour they provide as a key resource, which if mobilised effectively, can be vital to the survival of organisations. As Hrafnsdóttir & Kristmundsson (2017) note, people and who they are and what they can offer, are especially important for third sector organisations, because they often rely on the involvement of people in the form of volunteers, to deliver essential elements of their service. When public and for-profit organisations need to prioritise money to pay their human resource and deliver their services, many charities require what people can offer without pay. This was echoed in my data, where one of the managers spoke about how essential volunteers are to her charity and how she recognises the value of people, over the value of money;

> *'We could have all the money on offer, but without people to deliver the services it's worthless' (Jane).*

Whilst some organisations might manage human resources in a way that is comparable to other material resources, for example, treating people as commodities, which can be bought, sold or discarded after use - human beings as a resource are not like other resources. They are not passive and generally predictable, but complex, unique and multi-faceted (Fortier and Albert, 2015). As Greenwood states, 'to call a person a resource is already to tread dangerously close to placing that human in the same category with office furniture and computers' (2002:261). I build on the categories of RMT, to analyse and present my findings. However, by separating material resources and human resources into two different chapters, I am indeed treading dangerously close to comparing people to furniture. In Chapter Three, when setting out the theoretical concepts and frameworks that have influenced this work, I draw an important distinction between the material as a resource, one that is variously fungible but available to people, and the 'human' as a resource. Through the rich narratives shared by people who connect with charities,

this chapter will capture the complex and multi-layered nature of how people relate to the organisations and are valued and valuable as human capital.

Drawing on the narratives of both employees and volunteers and data from the charity's publications and websites, I consider what volunteers offer the three charities in terms of human capital and focus on the knowledge and experience they provide. I show how volunteers are aggregated or self-produced as a resource and identify the nuanced understandings of what working or volunteering for these charities means to the people within them. People and their practices play an important role in each organisation's identity and operational activities, and therefore contribute, as a resource, to their continued survival.

**Defining Volunteering and Acknowledging the Literature**

'Volunteering is a complex phenomenon', which is difficult to specifically characterise, and which spans a variety of activities, organisations and sectors (Hustinx et al, 2010:410). The social practice of volunteering can have multiple meanings; depending on what 'volunteering' means to individuals and just as importantly, what individuals do *not* think is volunteering (Handy et al, 2000). One of the most recent definitions, which offers a useful starting point and resonates with the narratives of volunteering in this study, is offered by the NCVO;

> *'We define volunteering as any activity that involves spending time, unpaid, doing something that aims to benefit the environment or someone (individuals or groups) other than, or in addition to, close relatives. Central to this definition is the fact that volunteering must be a choice freely made by each individual.'*
>
> *'This can include formal activity undertaken through public, private and voluntary organisations as well as informal community participation and social action. Everyone has the right to volunteer and volunteering can have significant benefits for individuals.'*

This definition makes explicit what are considered to be the core characteristics and defining principles of volunteering, which is that it is unpaid, undertaken through an act of free will, and is of benefit to others (Ellis Paine et al, 2010).

Whilst there is a general consensus on definition, several authors (Hustinx et al, 2010, Andronic, 2014, Einolf ez is challenging. My search for literature on the subject suggests that scholarship on volunteering dates back to the 1950s, to Sills' study of volunteers taking part in the March of Dimes (1957). The literature documents the various individual and social benefits of volunteering and the differing factors which have shaped engagement, such as social, cultural, political and institutional factors (Einolf, et al, 2011). I have observed that the literature tends to focus on discrete groups of volunteers, for example trustees (Chadwick-Coule, 2011), individual variables and the demographics of those who engage in volunteering (Gillespie and King, 1985 and Davis et al, 2018), or is directly related to specific organisations or areas of need (Cloke et al, 2007).

My reading has also highlighted that achieving a theoretical consensus is also challenged by the diversity and broad range of academics from varied disciplines interested in the phenomenon; for example, economists, sociologists, management theorists and social workers. Adding to this ambiguity, is the fact that cultural understandings of what volunteering is and what it is not, can vary dramatically across cultures. For example, Hustinex et al. (2010) describe how in Russian, there is no term to denote volunteers and in India the term social work is used to describe volunteering.

**The Role of Volunteers**

Volunteers play a significant role in all three of the charities. They contribute to many aspects of the organisational activities, from doing reception work, driving, supporting workers, fundraising and being trustees. Naylor and Mundle (2013) note, organisations need to think strategically about the different roles volunteers can take, to achieve maximum value from their volunteers and to meet their organisational objectives. That integrating volunteers into the core tasks and thinking systematically about the ways that people can add value to their service in a voluntary capacity, is important and then actively seeking and recruiting people to meet those needs.

This notion of adding value and contributing to the core tasks was evident in the interview data from CancerCare;

*‘As volunteer coordinator, I’m mentoring a lady at the moment as a volunteer, to do what I do, to go out and be a force out in the community for CancerCare, so give presentations and talk to other professionals’ (Alice).*

Alice is sharing her expertise and knowledge with someone who is prepared to do her job, but on a voluntary basis. Therefore, increasing the organisation’s capacity to advertise their service in the community, with a view to increasing awareness and referrals, and perhaps, gaining more material resources in the form of funding. Her use of the words to *be a force in the community* creates an association with strength or an energy that the volunteer can bring to this role of advocate and that by increasing numbers, increases this force. What differs in this particular charity, compared to the other two in this study, is that CancerCare does not use volunteers to deliver its core activity. The complimentary therapies and counselling support are provided by professionals who are paid for their time. Instead, it enlists the help of volunteers to provide services which enhance and enable the core activities to function. They engage in what could be termed, core support practices.

CancerCare uses volunteers to add value to its offer by combining their voluntary workforce with existing employees, to contribute to their ability to provide services at reduced cost. Another example is of volunteers doing gardening, which negates the need to pay for professional services. This is an example of how the charity mobilises resources in different ways to achieve its goals. In the gardening example, the charity is using work, done by a volunteer, to support its material resources. Rather than using the material resource of money to pay for a gardener. It seeks out and mobilises a human resource to ensure one of its key material resources, its building and the grounds, are maintained.

In contrast, Citizens Advice and Home-Start mobilise their human resource to deliver core elements of their service. They deploy volunteers to greet people on reception and engage in fundraising activities, but also to deliver their core aims. In the case of Home-Start this is family support and for Citizens Advice it is providing advice. As detailed on their websites;

*‘Our Volunteers give confidential advice online, over the phone, and in person, to help our clients resolve their problems. We also have volunteers*

*who support witnesses in court by giving information about the court process, giving support before the trial, and on the day. Our continual training and investment in our volunteers enables them to make a huge contribution to the Citizens Advice network. They are vital, allowing us to reach many more people that if we were purely staff-run' (Citizens Advice, 2018).*

*'Because when a parent can't cope with whatever life is throwing at them, then their children will suffer. And when a family asks us for help, it is a volunteer who makes the difference' (Home-Start, 2018).*

These quotes detail how central volunteer practices are to these organisations, that they are vital and make a difference to their service users. They also recognise how much the work of volunteers contributes to their ability to reach greater numbers of people in need of help, which consequently increases their value, particularly when competing against organisations who use paid workers. An interview with a manager from Citizens Advice highlighted how important recruiting and training volunteers are to the organisation, because he recognises that the service is based on volunteers offering advice, or as he puts it, *it's a volunteers' service*;

*'We spend a lot of time training, recruiting volunteers and it's the volunteers that deliver the first line services. We have specialist workers who do the kind of, the case work, things like that, or working on special projects or part of the, if you like, the support of management staff, but basically, it's a volunteers' service' (Dave).*

An interview with one of those volunteers, described the amount of training he received before he was able to give advice alone;

*'I decided I wanted to move to what we call Gateway, which is where we interview clients in a confidential manner. The training for that took about four months, by learning from others. As part of that you got two whole day sessions which is focused on how you interview the client in a successful way, in order to get out the issues' (Geoff).*

Dave's use of the words, *first line service* in his interview really highlights how integral volunteers are to the charity, that they are the first people that come to the help of their users. It creates an association with the similar words and phrases, such as front-line workers, which is often associated with emergency services, or the military. That the volunteers are sent to the front to deliver the work, while the paid workers, remain at the back. The way he refers to the work that the paid staff do as *special projects* also reiterates that volunteers do the day to day, core activities for this organisation, and that special tasks are reserved for paid staff.

Using its paid staff to recruit and train volunteers to contribute to and compliment their operational activities is not unique to this charity, in fact all three charities do this in different ways for different reasons. Citizens Advice recognise that in order to deliver their core services to as many people as possible, they need to train volunteers, as illustrated in this quote taken from an external report written by their Chief Executive;

> *'In 2012/13 we helped 2.1 million people to solve 6.6 million problems. To do so our 22,000 volunteers donated nearly 7 million hours to our service – that amounts to a contribution of £109 million worth of volunteering hours. Without this we would simply not be able to help as many people as we currently do' (Citizens Advice, 2017a:5).*

Here she quantifies their contribution as human capital outputs, by calculating what their unpaid human resource would cost if it had to be paid for. Whilst she acknowledges that this enables them to help more people and solve their problems, she also explicitly recognises and indeed celebrates how people and the time they offer for free, can be calculated as a mathematical equation to demonstrate their value. In this sense, more volunteers ensure that more people get help, which enables the organisation to justify its existence, which in turn can mobilise more resources in the form of funding. Their human resource is mobilised, quantified to represent a material resource, to aggregate more fungible resources, which can then be used to recruit more human resources in the form of volunteers. Volunteers become part of a commodified resource cycle.

However, as The Corporation for National and Community Service (2008) recognises, whilst numbers of volunteers recruited inevitably has an impact on the amount of people who can be supported, this does not necessarily translate into success for an organisation. They must support, mobilise and manage their volunteers effectively to ensure that they can have the desired impact. As evidenced in Dave's interview above, identifying appropriate people and then training and managing them as volunteers is an essential part of his role and something the organisation takes very seriously. Given that they are the first people service users see and engage with, they need to ensure they are trained sufficiently and can personify the organisational values. This is echoed in their promotional documents, which are used to recruit new volunteers;

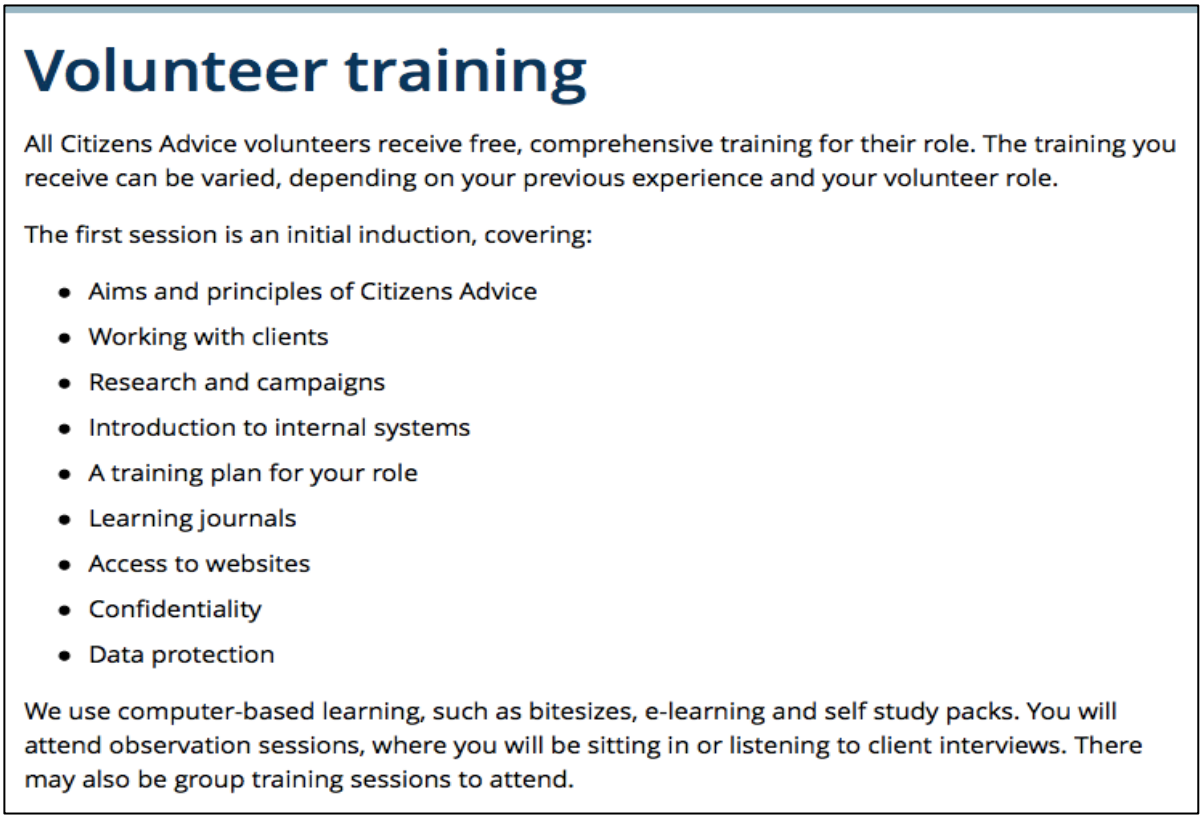
> *'All volunteers receive an induction when joining their local Citizens Advice. All advisers receive comprehensive free training, which is high quality and well respected. This training may consist of working through study packs, either individually or as a group, face to face courses and observing advisers or other volunteers and staff in their roles' (Citizens Advice, 2018*).

This details how once their human resource is aggregated, it is important that all volunteers are inducted into the organisation. As NCVO write in their advice for charities about recruiting and inducting volunteers, 'A good induction ensures volunteers are able to contribute quickly and feel part of the organisation' (2018:3). Ensuring that their aggregated human resource is mobilised quickly and efficiently, enables them to mobilise them on the 'front line' quicker. The organisation chooses to make explicit that their training is offered for free. This suggests that either some other charities charge for their training, or that volunteers should feel privileged that they are getting something for nothing. This is something to be acknowledged and celebrated, rather than something to be taken for granted. As such, it is suggestive of the competitive, marketised culture within the sector and where this charity fits within that.

How the organisation describes its training, relates to its identity as discussed in Chapter Six. As the quote above shows, this organisation is particularly concerned with demonstrating its quality and communicating that they are well respected as an

organisation, which permeates every aspect of their operations, including their training. Below is a screen shot taken from their national website (Figure 8.1). One could easily be forgiven for thinking this was a list for training employees to work for a corporate company. In particular their use of the word client;

Figure 8.1



## Volunteer training

All Citizens Advice volunteers receive free, comprehensive training for their role. The training you receive can be varied, depending on your previous experience and your volunteer role.

The first session is an initial induction, covering:

- Aims and principles of Citizens Advice
- Working with clients
- Research and campaigns
- Introduction to internal systems
- A training plan for your role
- Learning journals
- Access to websites
- Confidentiality
- Data protection

We use computer-based learning, such as bitesizes, e-learning and self study packs. You will attend observation sessions, where you will be sitting in or listening to client interviews. There may also be group training sessions to attend.

It is understandable that this organisation takes the training of its volunteers very seriously, because they are ostensibly taking on the role of professional staff. As Lie and Baines note (2007), in organisations where the majority of funding comes from the state or local authorities, there is a greater emphasis on accountability and skill development, which leads to voluntary work resembling paid work. This can lead to institutional isomorphism where charities begin to resemble government institutions, (Scott, 2001).

This sense that the volunteers present as paid staff was evident in my data with people who connected with this charity for support. For example;

> *'I had no idea and then when I realised that everyone here was volunteering their time and I thought, in my eyes, my issue is that I've not been given some money that I earned and don't have enough money to get a lawyer, the only person willing to help me with this is someone volunteering their time. There's nobody in a paid position making sure that employers are sticking to the rules and I thought that was absolutely incredible, like, fair play to them for doing it' (Yasmine).*

Yasmine tells us the story of how she realised that the support she was offered from this charity was provided by a volunteer. That it was a volunteer who helped, indeed they were the 'front line' of support for her when she sought advice. Her story informs us that when she originally connected to the charity, she did not know the service was provided by volunteers. As she recalls this memory, she highlights how there is a gap in public services and that her only means of getting support with the issue she described, was by seeking help from a charity which uses volunteers to deliver their service. Her use of the metaphor, *in my eyes,* encourages us as the listener or reader to recognise that this is her perspective and it helps us to imagine the situation she found herself in, to consider it from her point of view. Not only was she able to get the advice she needed to help her resolve the issue with her employer, but the fact that someone had volunteered their time to help her, is described as *incredible*.

Buckingham (2012) discusses this in her work, which explores the blurring of lines between sectors in the mixed market of welfare. She suggests that the fact that volunteers have given up their time to help others, enhances the service they provide and could have a further positive impact on the wellbeing of the person they are helping. That people seeking support appreciate and feel good that somebody would give up their time to support them. When asked does Home-Start make a difference to her family, Elsbeth, who gets family support from a Home-Start volunteer for her grandchildren also articulates this;

> *'They make a difference. Charity are nice. You know, you don't pay them, they are coming to be like, they are doing like as though they are doing for they family. How can I not appreciate it? We do and I appreciating what they are doing' (Elsbeth).*

The way she says, *you know, you don't pay them*, reflects that this is unexpected and that she needs to reinforce the point to me as the listener. She takes this further, suggesting that their support is reminiscent of how families care for each other and how much she appreciates this. This illustrates how a volunteer comes to be described as being like family, through being unpaid; rather than supporting them as a professional might do, she does it as though she is caring for her own family. Elsbeth's use of a question within the narrative, *how can I not appreciate it?* draws me in to her story and questions me as the researcher. Put this way, it suggests she thinks it is odd to even ask the question I pose, because it is so obvious to her. She develops this further by changing from *I* to *we,* recognising that this is not just her opinion, but it is also the opinion of the rest of her family.

Buckingham (2012) also writes about how there are certain 'niche' roles that volunteers are best placed to fill. At Home-Start employees recruit, train and match the volunteers with families, but it is volunteers who predominantly offer family support and run their groups. This provides not only a financial benefit, but also recognises that because of their experience of being a parent in the same community, they could be better equipped to address the specific needs of their service users. They are able to offer community connections and lived experiential knowledge, which would be less instinctive to employees who may not be from the community, or do not have parenting experience. Practices of knowledge exchange occur through lived experience, which means it is not imparting knowledge, but sharing it from an equal position. Whilst of course some employees could have this, if this is not the case, it could take years for them to gain. The volunteer's position of being an 'insider' positions them as (potentially) equivalent with a level of knowledge, familiarity and trust, which is appreciated by those seeking help and is invaluable to charities in their goal of addressing a community need (The Corporation for National and Community Service, 2008).

**Experiential Knowledge of Volunteers**

As my data has revealed, mobilising human resources in the form of volunteers is not only a means of saving money and reaching more people, but it is also about the value volunteers add in terms of their experiential knowledge and practice. Experiential knowledge is a truth gained from personal experience of a phenomenon,

rather than a truth learned from discursive reasoning, observation, or reflection on information provided by others, without direct experience of the phenomena (Elsdon, et al, 2000). This is at the heart of the vision for Home-Start (as detailed in Chapter Six). Personal experience of the issues that those seeking help face, offers a motivation for volunteering. Sandra, who spoke about this in her interview, runs a voluntary group at Home-Start for women who have experienced domestic abuse. Earlier in the interview she describes how she experienced abuse years before, and how much she appreciated the support she received from a charity;

> *'Well, I have been involved with Women's Aid, when I was in a particularly bad situation, I got a place in a Women's Aid refuge, which enabled me to get out of a very, very violent relationship, marriage actually. And actually, and it put me on to a completely new life, you know. Many years ago, my children were just babies really at the time, now they've grown up and I think sort of having time on my hands, you sort of look to put it back in what you've had out, you know, because to me it was just essential. The help I got enabled me to create a much better life for myself and my children' (Sandra).*

How Sandra narrates this part of her story, provides an insight into how personal circumstances have led her to engage in a voluntary role. She offers a story about her past, to explain her actions in the present and the content of the story is designed to enable me to understand an emotional context which inspires her to get involved. She is clear and to the point that her marriage was very violent and that it was the support of a different charity which helped her and her children to escape that situation. She is pragmatic about her past, she does not describe how it made her feel, but she describes the support she received as being essential which leaves the listener to fill in those gaps, which she chooses not to fill.

This narrative helps us to understand that not only does her lived experience of domestic abuse equip her to empathise with the issues the women she supports face, it also inspires her to help others, and to offer something which would be difficult to replicate within the constraints of a professional relationship. She recognises this later in her interview;

> *'It's a real understanding of the issues because I've experienced it. I mean, there will be people working in professional roles, who haven't experienced hardship and family trauma and things, but a lot of the volunteers here and you know, that is the reason why they are volunteering' (Sandra).*

Her use of the word *real* when talking about understanding is poignant and she relates this to experience. In articulating it this way it suggests that people who have not experienced domestic abuse can only have imagined or supposed understanding, but that her experience is not artificial. She is qualified through her experience to offer real help. This establishes a particular type of relationship practice, which does not conform to the power dynamics and unequal roles that can exist in professional-non-professional relationship practices. It indicates a volunteering practice, which has experiential knowledge at its core, that of self-help/mutual aid.

**Self Help/Mutual Aid Practices**

This is a type of volunteering, which is undertaken by groups of people who share and are drawn together because of either a problematic health concern or an economic or social situation. An example, as cited above, are the mothers who have experienced domestic abuse, or people who have been diagnosed with cancer. This type of support and way in which human resource practices are mobilised in these charities, is inextricably linked to the social, political and economic circumstances in which it occurs (Munn-Giddings et al, 2016). Seebolm et al (2013) note that mutual aid is often initiated by professionals, who act as a catalyst by encouraging people with similar issues to come together to support each other. However, what makes this form of support and volunteering distinct, is that it is not professionally led here. Its core characteristics are that; it is run for and by people who share a specific issue or concern; the primary source of knowledge is direct experience of a particular issue, held by the participants; and it occurs predominantly in the non-profit sector (Munn-Giddings et al, 2016).

Self help/mutual aid foundations are built on reciprocal relationship practices, or as Munn Giddings et al explain, a process of 'patterned, reciprocal exchange' (2016:393). A group is formed because of an identified need, often where there is a

gap in public services (Seebohm et al, 2013). When new members join, they receive advice and support from peers, which in time they repay to other new members, as part of their own journey of development. Members are encouraged to meet, share stories and coping strategies, offer each other emotional support and provide a space where they can talk openly about the issues they all face, within the context of the over-riding issue. All without fear of judgement, analysis, or a lack of understanding by those who have not experienced what they have. As a group, their experiential knowledge grows and develops from not only everyone's individual narratives, but also their collective narratives.

To illustrate this, I draw on an example which relates to Lottie, who volunteered for CancerCare. She had experienced breast cancer and set up a support group. In the following, she describes how her self-help/mutual aid group was established. The person she refers to in this first extract is an employee of the charity, who has also had cancer and who encouraged Lottie to set up the group;

> *'{Name} and I realised what we were giving each other in our conversations and then I started sort of buddying a few people that were being newly diagnosed at the hospital. And I had a few friends whose friends were being newly diagnosed, so it ended up with swapping numbers and just doing it, not really in a formal sense. Just literally sharing stories and my experience' (Lottie).*

Through their conversations, they were *giving each other* something, that it was reciprocal support, despite the fact that one was a paid member of staff and she was not. She describes these reciprocal practices as 'swapping numbers', 'sharing stories and my experience', 'just doing it'. Although not explicitly stated and perhaps this was not intentional on the part of the employee, she does act as a catalyst here and inspired Lottie to share this "giving" to others. This illustrates that there is an important exchange that takes place between people who have a shared experience of an illness, which Lottie recognises and responded to.

She offers another example of when she has experienced a need to seek out experiential knowledge in her life, drawing on a context which she knew I was

familiar with because she was aware that we had a shared experience of motherhood;

> *'I always equate it to when you are pregnant, and you seek out other new mums, or other pregnant people, you ask the people because they are in the moment, they are the ones that have the answers for you and {name} recognised that this worked really well '(Lottie).*

Lottie uses *you* as the second person pronoun here and whilst it is used as a generic you (or the colloquial substitute for one), because of the subject matter and that I am aware that Lottie knows I am also a mother who has experienced pregnancy, I recognise it as a shared understanding. It prompts me to put myself back in that situation and remember how I sought out experiential knowledge from peers; this call on mutual recognition is designed to enable me to understand the concept within the charity's context.

Through this story, Lottie articulates the value of seeking out and interacting with other people who can empathise with what she was experiencing and who could also offer advice and guidance based on their lived experience. She argues that because they are also *in the moment* (as she puts it), their knowledge is more valuable - they can provide the answers for her. Unsurprisingly, the value of experiential knowledge has been explored in medical research (Boardman et al., 2018), which recognises its unique contribution to health and well-being. Experiential knowledge is acquired through people's direct interaction with their social, physical and intellectual world - it encompasses all three. Experiential knowledge can have a positive impact because it is seen as a pragmatic means to help people with particular illnesses. It consistently draws together different people's experiential knowledge and translates it in to sharable strategies and interventions for living and coping with a particular medical problem (Boardman, 2014). Lottie references this;

> *'I remember one day {name} put, "ok give us your top ten tips for chemo, you know, how you got through chemo, go!" And so, we all had to write out ten, you know, and it was great because there were a chunk of people who just found out that they needed chemo and you know things like, I was told to paint my nails dark because light can affect them. Erm, do batch cooking and*

*freeze it all, sometimes you think I'll have take-away, but actually your taste buds don't want that, they might just want a Shepherd's Pie, you know, bland food is often what people who are having chemo fancy because you can't hack spicy food, cos your taste buds change and often fall out and your mouth is a bit of a mess, so you might not fancy a curry, you know that might be your go to meal if you fancy a treat. You know, so things like that, these are the things to tap into. That kind of peer support was just second to none' (Lottie).*

The detail that Lottie brings to this narrative, exemplifies the rich quality of experiential knowledge that can be exchanged. How this is not knowledge that relates specifically to the treatment or the illness, but it is about everyday challenges. This is an example of how collective narratives of members, provide the group with valuable information to help them through challenging treatment. Whilst tips about nail polish might not have direct health benefits, knowing that this will happen could prevent a call to a medical practitioner because of concern about nail changes. It could also help boost self-esteem, if someone feels less conscious of their nails if they have been painted to hide the effects of chemotherapy. From the perspective of someone engaged in self-help practices, Lottie described how founding the group and the reciprocal support it provided, was not just beneficial in helping others, but that it helped to boost her self-esteem and confidence also. She offers a moving story of the impact of a cancer diagnosis, the surgery and treatment associated with it and her altered sense of self. Her story articulates how it affected her on many levels and across many aspects of her life, such as her gender, age, and appearance and provides a compelling insight into her motivations to volunteer as means to rebuild her confidence;

*'An amazing achievement and I am really proud of that, but that was such a big deal for me, to prove to myself, because your confidence, mine in particular, and I can only tell you how I felt, but your confidence does take a battering. Not just from your appearance, though obviously your appearance changes, it takes you a long time for you to feel, well for me to feel feminine again. But it was more than the confidence of how you looked, it was as if you were stripped of some of you and at 34, you feel like you've got forever still, and you know you are not invincible, but you kinda are, you don't question*

*your mortality, or you don't expect to, you don't expect to be poorly. You've got sort of drugs in your house and going to these hospital appointments back to back. It's just an unnatural state. I can remember sitting in the, what they call the front lounge in oncology, which is glass, big glass windows and thinking, I'm one of the little shiny heads that you see through the window, with a drip next to me, I am one of those people and I'm one of those people that I used to go, god bless them and pity them when I was walking past on my way to shopping or whatever. And there I was, the same, so you know, all of that, all of those memories and think that you know you sort of, they are the things that strip you of your confidence and make you wobble a bit' (Lottie).*

She recognises that what she has done as a volunteer for this charity is an achievement and how important it was to her in her recovery. She articulates a need to prove to herself and perhaps to others, that despite her diagnosis and illness she can achieve something useful. This provides further evidence of the importance of *reciprocal practices* in this type of volunteering, sometimes referred to as the 'helper principle' where those involved are helped and enabled, whilst helping others (Munn-Giddings et al, 2016).

Lottie's description of being stripped of a part of her, suggests that by achieving something positive, it enables her to feel whole again; more like herself before her diagnosis. Riessman (2012) writes about illness narratives and discusses how serious illnesses, such as cancer, are disruptive life events which often fundamentally alter peoples imagined and expected biographies. Lottie's choice of words helps us to understand how she has lost part of herself physically, through surgery and treatment, but also her confidence, and her life as she knew it pre-diagnosis. Disclosing her age enhances the sense of shock she experienced; how she did not expect to be faced with her own mortality at that age, which inevitably affected her confidence and attitude to life.

Her use of the words unnatural when talking about the amount of drugs she had in her house and the amount of time spent at hospital, highlights how this disruption seemed alien to her, that it was not part of her life, but something she associated with others. Referring to the past, she 'others' those with cancer when she talks about the people she had observed being treated through the window and the pity

she felt for them. Her repetition of the words, “I am one of those people” conveys the sense of shock and disbelief that this has happened to her. It is understandable that this had a significant impact on her self-esteem as she relates to herself as someone who deserves pity. Riessman (2008) noted a poignant benefit that narratives can provide the narrator, which is that formulating the words to tell a story, can act as a map, which enables those concerned to repair some of the damage that illness has done to their sense of where they are in life and where they may be going. As Mishler puts it;

> *‘We continually re-story our pasts, shifting the relative significance of different events for whom we have become, discovering connections we had previously been unaware of, repositioning ourselves and others in our networks of relationships’ (Mishler, 1999:5).*

Sharing stories and experiences is an important part of mutual aid to re-story. As members cope with the re-positioning of themselves and the sense of feeling different, the desire to find comfort and strength from those who share experiences to re-story can be beneficial. Coming together as a group, provides emotional relief from those feelings and inevitably, strong solidaristic bonds are formed among participants (Giarelli and Spina, 2014). Self-help/mutual aid group practices can be beneficial in overcoming the social stigma and otherness that members possess, or at least feel that they possess, and their perceived change in social status (Archibald, 2008). As happened for this group, it can become one of the purposes of the group to increase awareness of an illness and its impact, with a view to reducing stigma.

Lottie talked about how her group achieved this, by deciding to make a Knocker Jotter. This is a journal they produced that included photographs of the group with their surgery scars visible, and their stories. Proceeds of the journal went to CancerCare;

> *We did the Knocker Jotter. So, that again was an amazing two day experience where we did the photo shoot and some of those women, the only person that had seen their scar had been their husband. Some of them had had horrible feedback from other family members about it being ugly and*

*unsightly. Then they are there on a hill, with just the elements and gay abandon and just owning the moment and owning what had happened to them and to have been part of that was just outstanding, it was something that you can't, you know, that will be a memory for ever that I will just treasure. It was so wonderful to see, so liberating, so special so yeah and that wouldn't have happened if {Group name} not happened, had the conversation with {name} not happened (Lottie).*

This is an example of the power of re-storying as a human resource which is mobilised in this charity.

**Philanthropy and Service Practices**

Volunteering as a philanthropic service is what many people would identify and associate with volunteering in the UK (Low et al, 2007). It is an approach to helping others, without an expectation of reciprocal behavior. Salamon defines philanthropy as 'the private giving of time and valuable resources for public purposes" (1992:10). As discussed in Chapter Three, in relation to resource inequality, time and money are limited resources, that typically are used to take care of one's own personal needs or that of one's family (Konrath, 2014). However, they can be used to help others, without any expectation of receiving anything back from the recipients.

This type of volunteering is linked to altruistic behaviour, which is claimed to be "motivated mainly out of consideration to other's needs rather than one's own" (Piliavin and Charng, 1990:30). Examples of this type of volunteering and behaviour was evident across all three charities;

*'It would be nice to do a little bit more, but I think it's a really, really beneficial charity, to a lot of people round here' (Joan, CancerCare).*

*'Well, I think it's important because you are giving your time, I think that's it, like you really wouldn't give your time up for something that is commercial, it would have to be for a charitable reason, so that's behind it really. It's good to try and sort of help in the community' (Janet, Home-Start).*

*'I can use the skills that I got and give something back to the community' (Paul, Citizens Advice).*

As these interview extracts detail, offering their time as a resource to help others, particularly those from their community, is an important motivational aspect to these volunteers. Taking part in voluntary activity can directly connect a person to their community and inspires a sense of social obligation, which is necessary to promote social action at a local level (Narushima 2005). A desire to take part in volunteering can inspire commitment to a community (Rifkin 1995). Volunteering helps people to feel good, they are giving, but by giving they are also helping themselves. Here Janet describes how volunteering helped her to re-connect to the community she had returned to;

*I moved back to {place} when I retired, and I was looking, well really to become involved in the local community. What attracted me to this charity is that it is community based, its community funded and it is very localised' (Janet).*

The importance of 'community' is clearly very important to Janet, because she repeats the word three times in a just a couple of sentences. Social action in the form of volunteering can help people bond with their communities and provide a means for people to connect their own interests with those of others; it can be the 'bridge between individual and collective concerns' Synder, et al (2009:231).

**Accessing Volunteers as a Resource**

Volunteer recruitment is an important task for non-profit organisations (Hager and Brudney, 2011). Aggregating and mobilising human resource practices requires volunteers and a significant amount of time and effort. Organisations have adopted varying approaches to achieve this. Hager and Brudney's research, which responded to survey data from almost three thousand charities in the United States, recognises that the ease and means by which organisations attract volunteers is innate to their organisation and relates to their social goal or aim. For example, organisations that support children in sport could find it easier to recruit, compared to an organisation which support adult males coping with substance misuse. Marx

(1999), in his study which used interview data to examine motivational characteristics associated with volunteering, notes that small charities providing health and other human services have more difficulty attracting volunteers than larger, nationally “prestigious” organisations. His research proposes that this is related to larger organisations paying closer attention to their brand and marketing, which conflicts with my own findings in the stories of CancerCare. However, it does resonate with Citizens Advice.

Citizens Advice use brand and marketing practices, drawing on the expertise of their umbrella organisation to attract volunteers. The national organisation can advertise nationally, with potential new recruits being guided to their local branch. For example, Jean when asked why she decided to be involved with Citizens Advice replied;

> *‘I got The Guardian book of volunteering and I looked through that and CAB sounded like a possibility. I got in touch, came along and did the training. I’ve been here ten years’ (Jean).*

All three charities in my study consistently managed to attract volunteers, and there were other parallels in how they achieved this. For example, all three advertise for new volunteers on their websites and social media platforms. Varying approaches to recruitment, inevitably has an impact on who a charity attracts; if an organisation advertises for volunteers via a university website, they are more likely to attract a younger demographic than if they adopt more traditional methods, such as advertising in a broadsheet newspaper. Tang and his colleagues (2009) note that some organisations attract volunteers from across the age spectrum, however others tend to primarily recruit retirees. This was my observation of Citizens Advice where, unlike the other two charities, all the volunteers I interviewed for this study were retired. Of course, this is in part due to the small sample size and availability of people prepared to take part in a research project, however it was discussed by one of the volunteers, who described the employed roles which her fellow volunteers had done in the past;

> *‘So, if you look at the group I work with, I’ve got an ex magistrate, somebody who used to run the power station, somebody who used to teach social work,*

*what else have we got, we've got one that comes in sometimes who was a consultant psychiatrist' (Andrea).*

Volunteers being retired was a theme within my analysis. Furthermore, another notable connection and theme between interviews at Citizens Advice is that every volunteer, when asked to tell the story of how they became involved with the charity, all chose to answer by telling me about their previous professional experience and how that related to their role at Citizens Advice. Below is an example from Geoff;

*'My background is that for 35 or so years I was a librarian in the academic community. My degree is in Law and Geography. I worked for a polytechnic and then later a university. I was a Law librarian in one of the biggest universities in the UK. I met a friend at a conference and she said, the sort of skills that a librarian has, are just the skills that she has found are useful at Citizens Advice, which she was volunteering for. And I needed to have some sort of occupation after I retired and where I could use the skills that I'd got' (Geoff)'*

Geoff provides a relatively detailed account of his previous experiences, especially given that this was not specified in the question. By choosing to answer in this way, he clearly feels that his professional expertise and academic qualifications are important. He draws on his experience to justify how he is qualified to volunteer at Citizens Advice and that retirement does not mean that he no longer has skills to offer society, in fact to the contrary.

It is unsurprising that this theme is evident in this particular charity, because it reflects the organisational identity and the discourse which permeates every aspect of this analysis of this organisation, which is about quality and being well respected and professional. Geoff does not mention a desire to help people, instead he discusses a need to find a use for the skills he has acquired in his career. Although helping others could be part of his reason for volunteering, his story and what he chooses to say in response to the question, is much more focused on himself, informing me about his experience and fulfilling his needs.

Home-Start recruit volunteers in numerous ways and as Barbara, one of the employees explains, they find it challenging;

> *'Finding volunteers is hard. We try to do networking events to meet new volunteers, and we put posters up all round the area. Some of the other agencies round here help and signpost people to us. The best is when we have what we call the circle, when someone was originally a family, then decide that they want to train as a volunteer and they do the course of prep' (Barbara).*

Barbara's account offers examples of some of the strategies they use to recruit volunteers. There is a local focus, which relies on existing networks and simple marketing strategies. She describes how this charity self produces some volunteers, by training people who initially connected with them for support. This is a useful strategy because those people will begin their journey of volunteering, with an understanding of the aims of the charity and what it does.

It is conceptually different than self-help/mutual aid, because although the concept of peer support is the same, i.e. parents helping parents, it is not reciprocal and there is a more formal arrangement, because the person who decides to become a volunteer assumes a defined role. There is a formal transition process from being a "family" as Barbara describes it, to becoming a volunteer, which is the training. The details of which are shown in Figure 8.2 below. Before being allowed to become a family support volunteer at this charity, a person must complete 40 hours of training, which includes learning about the role and responsibilities of a volunteer and about their policies and procedures in areas such as safeguarding. It enables the organisation to ensure some quality control over their volunteers and that people feel prepared and supported to represent the charity.

Figure 8.2

## How are home-visiting volunteers supported?

Home-Start volunteers are thoroughly trained and supported before and during their time with a family, and can expect:

- an induction to Home-Start's service,
- 40 hours of preparation training, run weekly, before meeting your first family,
- regular support and supervision sessions with staff at your local Home-Start,
- paid expenses during the training and while you support a family

Many Home-Starts also offer the opportunity to gain a formal qualification (sometimes known as accreditation), as well as additional training to supplement your preparation and induction.

## How does Home-Start support volunteer trustees?

Trustees are fully inducted into Home-Start before beginning their new role; they will receive:

- an induction day, introducing Home-Start's service and your responsibilities
- safeguarding training: providing an overview of safeguarding children in Home-Start, how to respond to concerns about a child and understand where to go for advice and support
- training on providing a high-quality service to families (quality assurance)
- paid expenses
- access to Home-Start's intranet – full of information and guidance on running a local Home-Start
- the support of specialist staff at Home-Start UK

Although Barbara describes acquiring volunteers in this way as the *best* way and one could understand how this would give the charity workers a sense of achievement, it could also be problematic for those making that transition. I asked Laura, one of the research participants who had experienced "the circle", her experience of that transition;

> *'It is hard really because, with me being a new volunteer, I am quite young too, I do make a lot of slip ups, I tend to be a lot more pally than I probably should be, but you just got to think, well you've just got to be a bit more professional, if you can help it. But I think that's how she likes me to be, because I'm very relaxed, but we do have a joke and a laugh and a giggle, but it's hard to sort of swap from, you know, normal me, to having to be professional because I've never had to do that before' (Laura).*

Laura articulates finding the change in role challenging. She understands that there should be a more formal relationship between herself and the mother she supports, because she describes being *pally* as a *slip up.* This suggests that she is aware, probably through her training (although she does not say this), that offering family support to a mother is different than being their friend. She describes this formality as being *a bit more professional* and that to achieve this you must consciously

assume this role. Her use of the words, *you've just got to be a bit more professional, if you can help it*, suggest that she does struggle with this. She takes this further by saying that she finds it difficult to swap from being herself to being more formal, because this formality, or what she understands to be professionalism in this context, is not something she has experienced before.

This contrasts with the narrative from Geoff at Citizens Advice, where he highlights the transferable professional skills he brings to the voluntary role. We gather from Laura's narrative that she does not bring professional experience, but she brings experience of being a mother who has previously needed help. Both are useful attributes and relevant for the different volunteer roles. Geoff brings professional experience which then transfers to his voluntary role, whereas Laura could take the experience she has gained from volunteering into a career in the future. They are at different ends of a career spectrum, but both are valuable human resources for the charities. Equally, the charities meet their needs, whether that be needing a purpose in retirement, or training and experience to help them start a career, their volunteering is mutually beneficial.

## Conclusion

This chapter has focused on human resources. It has explored how each charity accesses and mobilises this type of resource and how this contributes to their sustainability. It specifically discussed the role of volunteers and analysed how the research participants narrated voluntary practices within each charity. I concur with the literature referenced at the start of this chapter, which recognises that volunteers play a significant role in charities. The data revealed that all three charities rely on volunteers to deliver aspects of their service. At Citizens Advice and Home Start, volunteers deliver the primary function of the charity, whereas at CancerCare they support the professionals who deliver the therapies. Volunteers add value to these charities by working collaboratively with employees and contributing their knowledge and experience, whether that be direct experience of the need which the charity aims to address, or professional expertise.

Mirroring the findings from the previous chapter, organisational identity and the need which the charity aims to address, impacts on how the charities access volunteers.

For example, Home Start's family focus, which permeates every aspect of their organisation, enables people who have joined the Home Start "family" to grow and develop within it and advance from being someone who connects for support, to becoming a provider of that support. They self-produce their human resource. The analysis shows that CancerCare does this also, but their self-produced volunteers provide support as a peer, rather than a trained volunteer. Citizens Advice takes an approach which mirrors professional employment, by using targeted advertisements and relying on their brand to attract volunteers. In this data, there was no evidence of the volunteers from Citizens Advice volunteering because they had a sense that they wanted to "give something back" for the support they had, which was the case in the other two charities.

This chapter has recognised the important contribution people make to a charity's sustainability and the previous chapter focused on the material elements which people interact with. The next chapter will explore what happens when the human resources combine with the material resources, to discover and analyse the contribution of social practices to sustainability.

# Chapter Nine - The Practices

## Introduction

Employing a social practice theory lens to explore organisations has become increasingly popular (Nicolini, 2012). Its appeal within this field relates to its capacity to describe organisational features as being made and re made in practice through bodies, discourse and tools. It proposes that the social world can be explored as a vast accumulation of performances of practices 'made durable by being inscribed in human bodies and minds, objects and texts', which are knotted together in such a way that the results of one performance, becomes the resource for another (Nicolini, 2012:2). Organisations are bundles of practices (Nicolini, 2012), they are sites where multiple practices are performed simultaneously and which are produced and reproduced in relation to the environment in which they exist. To understand an organisation's development involves looking at actions as they are performed and identifying how these shape, and are shaped by, structures of the organisation's practices (Schatzki, 2016).

Social practice theory brings the notion of work back into the exploration of organisations and recognises that many social and organisational phenomena happen within, and are aspects of, the field of practices (Nicolini, 2012). This is important because it makes the organisation knowable through its 'doings and sayings' in an everyday sense. Observations of practices can be contrasted with what the organisation claims about itself (in marketing materials, online etc.). Observations and close engagement with micro-practices can reveal what an organisation is, how it works, what its identity is in and through its practices.

Whilst social practice theory has been used to explore and study organisations, predominantly corporate organisations, there are no studies which specifically look at social practice theory in relation to charities. The three organisations in this study are indicative of most charities, in that they exist to help and support people in need in their community. Home-Start's goal as detailed on their national website, is to 'help families with young children through their challenging times' (Home-Start UK, 2019). Citizens Advice's goal and objective is to provide 'free, impartial, independent and confidential advice to help people in need to deal with the problems they face"

(Citizens Advice, 2017) and Cancer Care's is to "Give support to adults and children affected by cancer so they can live the best possible life" (CancerCare, 2018). Whilst commercial organisations exist to generate profit and serve their shareholders, charities have a social goal which defines their purpose and dictates their activities. I am interested in how and when these social goals become relevant and are enacted in the practices of the people within the charitable organisations.

This chapter will focus on the bundles of routinised sayings and doings (Schatzki, 2002), the practices, which I have observed in the three charities. It will conceptualise the three organisations as places where distinct nexuses of practices and material arrangements happen. Nexuses of practices are a collection of practices which intersect (Hui, et al, 2017). Dispersed practices (such as talking, asking and answering questions, laughing, crying and so forth) make up the everyday interactions between people. Practices link to form integrated practices (showering, cooking, assessment, caring). One of the important contributions of practice theory is that it does not take these links for granted. It analyses how dispersed practices connect and asks how it might be otherwise, or in the case of charities, is it as they would want it to be. For example, through a careful examination of everyday practices linked to hygiene Shove et al (2012) notes that demand for water emerges from a range of activities – such as washing, showering, haircare – and that these integrated practices are themselves influenced by practices of social approval, marketing and so forth. Analytically, I aim to make the drivers of the charities integrated practices more explicit in a similar way.

Firstly, drawing on the interview data and themes which emerged, it will identify key practices which occur in the three different organisations. Then, adopting what Nicolini (2009) describes as a 'zoomed in' analytical approach, it will focus on three helping practices to consider how these practices relate to the specific organisational aims. It will focus on different elements of these practices and how they become inscribed in the bodies and minds of the people connected to those charities and what this tells us about how these charities continue to practice. To relate it to the previous chapters, this chapter will consider how the human resources connect with the material resources within these organisations, to create, perform and maintain practices.

To reflect the value driven nature of charities and the elements of their organisational identity which makes them distinct from commercial organisations, I will draw on Schatzki's theoretical approach. He categorises practices into four elements; practical understandings, general understandings, rules and teleoaffective structures. Whilst all four provide a useful and relevant means to structure my analysis, I am particularly drawn to this approach because of the teleoaffective structures element, which I propose is especially relevant to the study of charities. Schatzki describes this element as the set of ends, or purpose, that actors within an organisation pursue, which are made clear to and by other actors. As he states, they do not necessarily have to be made explicit every time a practice is performed, but they act as a means with which to socialise newcomers into a practice (Rosenberg and Keller, 2016) and they influence the hierarchical order of actions and purposes. They can include the beliefs, emotions and moods of the actors and, as this chapter will discuss, I have observed them to be crucial in the practices associated with the three charities in this study and important in understanding how third sector organisations operate and survive. Then taking a 'zoomed out' approach (Nicolini, 2009) I consider how organisational practices and bundles of practices, are connected to the wider environment in which the charities exists. Practice theory acknowledges and is underpinned by a recognition that the social world is increasingly in flux and is interconnected, that social entities appear and become known as the world evolves and that they occur within complex arrangements (Shove et al, 2012). Practice theory does not endeavour to define or place boundaries around social features, instead it encourages one to observe them as occurring as part of a fluid or dynamic scene, where multiple practices are performed simultaneously and are connected with materiality.

As detailed previously within this thesis, the third sector exists within a very fluid environment, where changes in national policy, political ideology and financial climate have a significant impact on how they operate. This is in addition to the localised, smaller scale context which charities also must respond to. As detailed in Chapter Six, charities are consistently having to evolve to survive. They must have a distinct organisational identity, which defines them, is enduring and enables them to access and acquire resources, but equally, they have to be responsive to their

environment and adapt. Whilst they contend with this challenging environment, I am interested in how this affects their practices. Practice theory provides a relational perspective which recognises that phenomena are mutually constitutive and relational to each other (Le and Bednanek, 2016). That any practice is part of a greater nexus of doings and sayings (Shove et al, 2012) and exploring the relationships which are formed within that nexus is fundamental to understanding how practices are dynamic and evolve. For example, applying for funding is an entanglement of practices, involving different actors across the organisation and often with the added complexity of involving other organisations (Jarzabkowski et al, 2015).

**Identifying and Zooming in on the Practices**

In order to explore the social practices within these charities, I had to identify what those practices were. As Nicolini notes, taking practices as the starting point for organisational inquiry can be challenging because practice constitutes the unspoken and scarcely notable background of everyday life. Consequently, practices need to be 'drawn to the fore, made visible and turned into an epistemic object, in order to enter discourse' (2009:1392). The interview data was essential in this process. As Glover recognises, a practice approach is data driven, because the particular characteristics of practices and the manner in which they interrelate, is unique to the context in which they occur (Glover, 2016). Close reading and analysis of the interview data enabled the identification of different elements of practices, as they were described in the narratives of the research participants. Zooming in on practices involves using theory to bring to the fore certain aspects of that practice. Nicolini (2009) proposes a number of ways this can be done, for example foregrounding the active roles of tools and materials, zooming in on how practices are learned and become legitimised within an organisation, or highlighting the lived directionality or telos of a practice. All are relevant to this study and useful, I suggest, when exploring organisational survival, but I will predominantly focus on the final way.

**Family Support as a Practice at Home-Start**

The first nexus of practices I explore is family support at Home-Start. All the interviews had descriptions and anecdotes of people's experience of either receiving

or providing what the organisation describes as family support. As detailed in Chapter Six, families and specifically those with at least one child under five years old, are the focus of Home-Start's aims and organisational goals. The quote from their promotional information, 'reach the family, reach the child' (Home-Start UK, 2019) succinctly puts into words how they recognise the importance of working with the whole family to improve outcomes for children. The theme of family is significant across data collected from this charity, woven through many aspects of their organisation. Family links their building, which is arranged like a family home, with comfy armchairs, toys and an open kitchen, to the approach of their staff, with a number of research participants describing the charity workers and volunteers as being like their mum or a family member. This connects directly with fundraising activities. For example, three women in their seventies, who self-identify themselves as the "Golden Girls" and describe themselves as the grannies of the group, come together to raise money which is specifically ring fenced to take the families on day trips. This family focus has an impact on the social practices which happen in this charity, particularly in the relationships between practitioners, but also the spatial and temporal elements of practice.

**Families and Practice**

Within the academic field of Family Studies, there is a breadth of literature which is concerned with family practices (Morgan, 1996, 2004, 2011, Adams, 1994, Becher, 2008 and Phoenix and Brannen, 2014) and within that, authors have differing views about how family is defined (Morgan, 2011). There are understandable concerns about family being expressed as a noun (*the* family), which reproduces heteronormative models of human relationships and could limit a more contemporary and flexible view of what constitutes a family (Roseneil, 2005). Whilst personally I am interested in some of the literature which offers alternative views and proposes different terminology, for example 'caringscapes' (McKie et al, 2002) or intimate practices (Jamieson, 1998), for this chapter and study, I am led by my data. This charity uses the word family to describe the group of people they aim to help and therefore I will do the same. It is important to note, that whilst the data does not suggest that Home Start strategically limit what that means, for example they do not only offer support to heterosexual couples or two parent families, the research participants I accessed via the charity were all women. Inevitably this has an impact

on how the practices are performed, particularly in relation to 'doing mothering' and the teleoaffective structures (Schatzki, 2002) within family support practice as the following analysis will detail.

**Family support as a bundle of practices**

Describing family support as a discreet practice is too vague. The interview data shows that there are numerous dispersed practices happening within this charity, which when they integrate and connect, become recognisable as practices of family support. This is exemplified in the following extract, where one of the people who receives family support describes why she needs help and then how this help is offered in practice;

> *'How does your volunteer support you?' (Cath)*
>
> *'I struggled to leave the house, I struggled to socialise with people I ended up locked in the house most days, so she actually got me out the house, told me when I was being silly and panicking too much. But I struggled to, because a lot of time my benefits were getting cut and my ex-partner, well, let's say he wasn't very helpful, he was out smoking weed and things like that with his mates, and so, it ended up with me looking after the baby all the time and I was struggling to get clothes and things like that. So, a lot of the time, {name} would give me clothing, take me food shopping, help me with my bills, take me on courses for money management and things like that' (Lesley).*

Here Lesley describes why she needs support. She begins by articulating difficulties socialising and feeling isolated and experiencing anxiety about leaving the home. This is then connected by her, to difficulties in her family living situation. She mentions issues with money, her partner's lack of help and use of drugs, and her struggle with child care. An explanatory link is made by Jenny to the worker between her partner being 'out…with his mates, *and so*, it ended up with me looking after the baby' for her 'struggling' (my emphasis). This draws on the expectation that family members should share in childcare responsibilities and an expectation that it will also be shared by the volunteer as a member of the charity. She is not expecting the

volunteer to respond by saying ‘your partner should go out with his mates and not help with the baby’.

From a practice perspective, the volunteer endorses her expectation of family support by engaging in a number of practices with Lesley, such as gifting practices, shopping and accompanying, which interconnect and form a bundle of helping practices (Shove et al, 2012). Although these practices may seem disparate, the context in which they happen and how this relates to the charities aims and social goal, link them. Blue and Spurling (2017) use the term connective tissue to theoretically describe how complexes or bundles of practices hang together. They argue that practices can be connected in multiple ways, for example the connection could be temporal or material, but what is also useful when exploring bundles of practices, is exploring the relationship between connections and how they come to be. I argue that the connective tissue within this bundle, is a desire by the volunteer to help a family and a willingness by the family to be helped, as a family. The bundle of practices which combine as family support can vary depending on the practitioners, for example, the needs of the family or the skills of the volunteer. Therefore, within this charity, the bundles of practices, can vary from family to family, but the connective tissue remains the same.

**Shopping**

The next section will explore shopping as a practice because Lesley identifies in her narrative that this is an activity with which her volunteer supported her. Shopping is a regular activity which is essential to enable a family to access and subsequently eat food and for many families it takes place in a supermarket. Some families would share this chore, for example two adults within a family might shop together, or one would shop whilst another might care for the child at home. Lesley describes the circumstances of her family context, which suggests that she has to engage in this practice alone, or with her young child, without help from another adult.

Shopping for food involves bundles of different practices, for example pushing a trolley, choosing food items, laying out, paying the shop assistant and packing (each of which comprise many micro-practices). These practices are performed in sequence with the end goal of purchasing food. Many of these practices are more

challenging to perform when doing so with a small child. For example, pushing a trolley is more difficult when a child is sat in the trolley. Not only does one have to master the skill of moving the trolley as a material object, the child's body is an additional material object which makes that skill more complicated. It requires another level of competency, which if performed alone, or with the help of another adult would be easier. If another adult is present, they could walk with the child, meaning that the other could focus on just pushing the trolley or they could reach for the food and place it in the trolley.

This is an example of how the family support volunteer could help Lesley to engage in and perform the integrated practice of shopping more effectively. How the adding of another body can be useful when performing some of the physical aspects of a practice. As the saying goes, 'many hands make light work'. However, there is an additional layer to this support, which I think is important when analysing the practice of family support in relation to need and how this charity utilises its human resource in practice, and that is the psychological support offered. Jenny talks about anxiety, feeling *panicky* and *struggling to socialise* with people and how this affects her ability leave her house. Her analogy of being l*ocked in the house* suggests that her mental distress leads to her feeling trapped, and she acknowledges that this is the case most days. This inevitably will hinder her ability to engage with numerous practices which have to be done outside the home, one of which being shopping. Due to technological advances and the introduction of internet shopping, buying food does not have to happen outside the home, however, Jenny's narrative suggests that she does usually go out to a shop.

The fact that she identifies shopping as something she has had help with suggests that her volunteer had to encourage her to leave the home. There could be many times within the practice of shopping where her anxiety could be heightened, for example, engaging with a shop assistant to pay for the food could be challenging when coping with anxiety. It potentially affects and alters how one performs the practical understandings element of the practice, which is the knowing how to do something there and then in the practice, because it can affect someone's ability to focus and concentrate. This is especially the case if they are feeling panicky, which could make performing this practice daunting and something to fear. Having

someone to help and step in to complete this practice if necessary, to offer a distraction or to encourage and reassure, supporting the competence and ability to do it, could be invaluable. A volunteer could provide not only her physical support, but her emotional and psychological support.

**Zooming in on Emotions and Teleoaffective Structures**

This section draws on an example which illustrates how integral emotional support is, as part of family support practices, becoming a discreet practice in itself. Teleoaffective structures include, 'teleological and affective components of action combined with intentions and goals that are influenced or directed by normative and emotional behaviour' (Caldwell, 2012:290). Emotions are an integral part of this element (Weenin and Spaargaren, 2016). Families and emotions are inextricably linked, every family whatever its make-up, experiences a range of emotions, particularly over life courses together. Inevitably, and reflecting this, emotions are articulated throughout the interview data from Home-Start and relate to the practice of family support. Weenink and Spaargaren (2016) recognise that emotions are (re)produced in social practices, because people experience and engage in the world emotionally. They argue that exploring emotions in practices enables us to understand why people engage with and care about the doings and sayings they participate in.

Sandra, a volunteer for Home-Start, recognises how the mother she is supporting can feel 'down' and lacking in confidence and that in response to these emotions, she engages with sayings and doings which promote confidence. It provides an insight into the teleoaffective structures which form a crucial element of this practice and how these are influenced by the emotions experienced by both women in the narrative;

> *'Tell me about how you help your Home-Start family?' (Cath)*
>
> *'I think the thing I do which makes the biggest difference is that I try to boost her confidence. She gets really down about, she thinks she is rubbish at stuff and I just try to make her feel better, tell her how well she's doing. Like when*

*he does something good, like says ta, he's got manners, she taught him that' (Sandra).*

Sandra's response suggests that she thinks that her family support practice does make a difference to this family and her use of the words, *the thing I do which makes the biggest difference,* leads us to think she makes a number of differences, but this is the thing which she feels is the most useful to the mother. Clearly, making a difference to this family is important to her and forms her goal in this practice, her telos. She is able to recognise that the mother in the family feels 'down' and responds to this mood and the emotions connected to that, by choosing appropriate words to remind her of something positive she has achieved whilst parenting. In this example, it is that she has taught her child to have good manners.

Here, Sandra uses her practical understanding of how to improve someone's confidence. Schatzki's describes the most common forms of practical understandings as, 'knowing how to X, knowing how to identify X ings, and knowing how to prompt as well as respond to X ings' (Schatzki, 2002:77). In this example, Sandra articulates that she knows how to support this mother and boost her confidence, by choosing and using words which will make her feel better. She can identify when a practice of confidence building is needed, for example when the mother feels down, and she knows how to respond by talking her through an example of something she feels she should be proud of, hoping this will raise her spirits and make her feel supported. She knows what to do and say.

It is a skill which Sandra brings to this practice and although it is not clear from this short extract, she is drawing on her ingrained social understandings of what it is to improve someone's confidence, perhaps learned from previous experience of engaging in this practice. Sandra may have supported other families and learned how to engage in this practice effectively, or she may have observed other family support workers and re-enacted how they have helped to boost the confidence of someone they are working with. In addition to this practical understanding of what to do and when, Sandra brings another layer of knowledge and skill to these sayings and doings, she demonstrates what Schatzki describes as practical intelligibility. This dictates what she chooses to actually do in that moment of action, how she chooses

to boost this mother's confidence in a way that will be practicably intelligible to the mother and is practically intelligible to her. All the volunteers from this charity are parents, therefore have experienced the intense emotions which parenting can bring. This insight enables them to 'know' in a mundane, routine way what could help the mother, which in this situation is to compliment her and to point out something positive she has achieved whilst parenting.

Practical understanding, linked to practical intelligibility are important elements of this and other practices associated with this charity. Analysis of the bundles of practices evident in the data shows how this charity effectively use their human resource, who as parents, have a level of practical understanding and intelligibility which is crucial in informing and shaping their support practices and making them effective. This is evidenced by one of the charity workers, who recognises this when describing what makes this charity different to others;

> *'All our volunteers have been parents and they have experienced in their lives what certain elements are and using that knowledge can help other families, but again that's if the family want that, to take that information on board and act on it' (Barbara).*

This practical understanding of parenting is transferred from parent to parent or practitioner to practitioner, but only if that is wanted. The volunteer only passes on that practical experience if the family requests it. This is evident in the following narrative where Laura, who is a volunteer, uses her experience of parenting and managing the behaviour of her own child to support a mother who is struggling with her daughter's behaviour;

> *'{child's name} started hitting, so because I'm a mum to a three year old, mum asks me what I did with my little boy to stop him hitting and things like that, so I explained time out to her and other different methods that she could use, but I've not told her what to do. I've shown her how to do it once and then I've got her to show me when she's hit again. So not taking over, see other organisations take over, but I think with Home Start we just show families, like first time mums and dad and things like that. You know what it's like, it's like I*

*put the little girl in time out when she starts kicking and screaming, I say to her, she can't do that to you, so it's basically trying to teach mum that she's in charge, that the little girl isn't and some parents don't get that' (Laura).*

This extract describes how the practices of explaining different methods, showing how to do it, getting her to show, not taking over, connect to the practice of trying to teach mum that she's in charge, that the little girl is not. These are performed as part of the support which Laura offers. The child hitting her mother is the issue, therefore a need is identified. In other organisations this might be taken over, bundled as a behaviour management plan. Here, the volunteer identifies that she can help teach by sharing her experience of what worked for her as a parent. What she does and says in this context is informed by her experience. She is showing the mother how to engage in "behaviour management" in practice, which she can watch and try to perform also. As practitioners, they share the same goal of helping to manage a child's behaviour and one more experienced practitioner is introducing another to this practice.

**Giving Advice as a Practice at Citizens Advice**

The second nexus of practices I shall explore is advice giving at Citizens Advice. Providing free, confidential advice to people dealing with various issues, such as managing debts, problems with housing and accessing benefits, is the central aim of this charity. Indeed, it forms the basis of their name and as detailed in Chapter Seven and Eight, it influences how their building is designed and who they recruit as volunteers. Advice is conceptualised and defined as a 'recommendation about what might be thought, said, or done to manage a problem (Guntzviller and Macgeorge, 2013:83). Exchanging of advice is a communicative practice, which relates and varies according to the context and cultural norms in which it is sought, and the power differentiations between the seeker and the giver (Blakemore, et al, 2019). Receiving advice is commonly perceived to contribute to positive changes, because it provides new and different perspectives on an issue and in some cases can create a shared sense of accountability between the advice seeker and advice provider (Bonaccio and Dalal, 2006).

As an integrated practice, giving advice involves a number of dispersed practices, which vary depending on the practitioners and the identified need. In the interview data from this charity, volunteers discussed how important listening was when they met with clients, because it enabled them to identify the issues;

> *'What we do first and foremost is listen, we need to hear what the client is worried about. A lot of what I think we're doing is identifying the issues, because people, as I said earlier on, they come in thinking there is one issue or there maybe a couple and we explore what the issues are' (Paul).*

Paul informs us how important listening is within the process of giving advice. He describes it as the first thing that he does, and his use of the word foremost provides an insight into how important he thinks it is. Listening is a dispersed practice, which forms part of everyday interactions with others and is connected to numerous other practices. It is central to communicative, experiential and public life (Lacey, 2013). Therefore people, as practitioners of listening practices, have developed a practical understanding (Schatzki, 2002) of how to listen all their lives. It can be a mundane, everyday activity, which is taken for granted within many social practices, for example when watching television. However, in this context, the listening is more conscious and is a significant practice within the bundles of practices associated with giving advice.

Worthington and Bodie (2017:1) write about listening as a multidimensional construct, which involves a complex of three processes. The first being an 'affective process', which is being motivated to attend to others. The second is a 'behavioural process', which involves responding to the speaker with verbal and non-verbal feedback. Finally, they propose that it involves a 'cognitive process' for the listener, where they receive, understand and interpret both the content and the relational messages. In Paul's role as a volunteer at Citizens Advice, all three processes are relevant when engaging in the dispersed practice of listening, as part of the integrated practice of giving advice.

In this context, the 'affective process' of listening, is informed by the teleoaffective structure of the practice of giving advice. Teleoaffective structures direct the aim practitioners should be pursuing and how the tasks should be executed, but also

evoke the emotions which accompany the enactment of the practice. Here the aim is to help someone, to recognise and respond to the needs or issue that someone presents with and offer guidance in how they might overcome their issues. This provides the motivation to attend to someone and provides another important element of affective listening, which is knowing why you are listening to someone (Worthington & Fitch-Hauser, 2012). In this context both Paul and the person seeking advice are led by their general understanding of how seeking/giving advice is supposed to work, which is informed by their previous experiences. Advice giving, in this context, is a communicative practice and therefore listening is a key element.

Paul, as a volunteer, is motivated to help people with their issues. Sometimes those seeking help are very distressed and that distress manifests itself in anger towards the advice giving volunteers, and can disrupt the general understanding of how the practice of advice should be enacted;

> *'There have been incidences where people have come in very upset about something and perhaps they are directing their anger at people here. It needs to be explained that look, we are listening, but would you just calm down, we're going to help you the best way we can, when we know what the problem is. Some of those clients are the most rewarding' (Paul).*

Paul describes that despite being confronted with someone who is angry, he is still prepared to engage in listening and advice giving practices. In a different context, when confronted with a person who is angry, Paul might choose to disengage and walk away. It would be understandable that his motivation to listen and attend to that person might be lost. However, as he describes, he confirms that he is prepared to listen, to help them and urges them to calm down. Paul enables us to picture the scene through his narrative, because he alters the way he is telling the story to include how he spoke with the person. It is as though he is re-enacting the scene for me as the interviewer, to show how he responds in these situations, particularly when he says *but would* you *just calm down, we're going to help* you *the best way we can*. This prompts me to cognitively put myself in this scenario as the distressed advice seeker and imagine how they felt when Paul engaged with them.

In this scenario, the normative emotions expected to sustain the situational order are disrupted. Paul suggests that the general understandings of how a person seeks advice and the usual emotions expressed, are different here. His use of the words *there have been incidences* when describing this scenario, suggests it is not usual for someone to be angry in this way. Anger challenges the teleoaffective structure and the direction the practice would usually, or ought to go. Weenink and Spaargaren (2016), drawing on the work of Hochschild (1983) would describe this as a shift in the feeling rules, which are the unspoken rules which prescribe how participants in a practice should experience and express their emotions. These rules may become manifest when the sayings and doings of a practice become maladjusted and might negatively affect the expected outcome (Weenink and Spaargaren, 2016). In this example, although the emotions usually related to giving advice are different, Paul remains able to focus on the teleoaffective structure of the practice and uses his practical intelligibility to alter the sayings and doings, to help the advice seeker to remain calm and subsequently engage effectively in the practice of advice giving and hearing.

This skill and commitment to providing advice, despite challenging and emotional circumstances, exemplifies how the stated aims of this charity underpin its identity, as it is actualised in practice. Paul responds and adjusts his sayings and doings to ensure that the practice of advice giving still occurs. Although there may be occasions where this charity has refused to give advice, to protect the safety of their volunteers and employees, in this scenario Paul combines his practical intelligibility with the guiding telos to help, to ensure advice giving is achieved. As described in the previous chapter, volunteers at Citizens Advice, must undertake training to engage in advice giving for the charity. His training and Paul's experience of engaging in advice giving practices previously, contributes to his practical understanding of how to adapt his practice in this context and effectively engage in the practice with someone who is in distress and angry. A further example relating to this practice, is from Yasmine who narrates her experience of seeking and receiving advice for an issue relating to her previous job, and obtaining money which was owed to her;

*'She showed me the website that I had already looked at, but she made it very clear to me that, that I was doing the right thing, plus these were the things that I needed to pull them up on. And her advice to me was that I wrote everything out in an actual physical letter because until to then I'd just been kinda corresponding via email and phone. Send it recorded delivery, print out all the Citizens Advice pages form the website, highlight everything relevant to me, give them a deadline and if they didn't respond to that deadline to then come back here. She was really, really helpful. It reassured me that I wasn't just kicking up a stink about absolutely nothing' (Yasmine).*

Yasmine articulates how the advice she had received was very helpful. That she had started the process of researching the issue and contacting her previous employers, but that the advice provided by the charity, reassured her that she was doing the *right thing*. Feng and Macgeorge (2010) write about Advice Response Theory and recognise four qualities of advice messages, which affect whether recipients respond positively, they are: Efficacy, how effective the message is in addressing the problem; feasibility, whether the recipient thinks they can achieve what is being suggested; absence of limitations, that there are no risks or drawbacks identified to following the advice; and confirmation, that the advice confirms what they were thinking. In this example, Yasmine articulates these four qualities, which correlates with her saying that the volunteer helped her. Her experience of engaging in advice seeking practice was positive, which will reaffirm her general understandings of what advice seeking involves and her telos in seeking advice has been achieved.

**Peer Support as a Practice at CancerCare**

The final bundle of practices I will explore, is peer-support at CancerCare. This is offered via support groups, which are either drop in sessions or regular group activities, such as walking groups and craft making sessions. People telling stories of the help and support they received from these groups, was a significant theme within the data, from both volunteers and those who connect with the charity for support. Angela talked about the peer support she received as part of her story about how this charity had helped her after she was diagnosed with breast cancer;

*'The peer support is really important. You feel like the only person in the whole of Lancashire who's ever been diagnosed with breast cancer in their thirties. You get diagnosed and you have no clue. You need to talk to people who have been there before you' (Angela).*

Angela articulates how her cancer diagnosis, made her feel alone. Her use of the analogy of feeling like the only person in a county to experience that diagnosis at that age, emphasises how isolated she felt. In this example, Angela found speaking with people who had been through what she was going through helpful. Although self-help and mutual aid has been discussed in the previous chapter, this section will look specifically at the practices associated with peer support in this charity and how these practices relate to the aims of the charity and form a significant element of the support they offer. Similar to family support, peer support involves dispersed practices integrating and connecting, to become practices of peer support.

**Peer Support and Organised Social Walks**

Articulations of support offered by peers, was evident in different contexts within the data relating to this charity. Later in her narrative, Angela described how she was encouraged by a volunteer to join one of the charity's walking groups. This is a group of people, all of whom have been directly affected by cancer, and who arrange to meet and walk together for a couple of hours each week; A social walking group;

*'{Name} suggested that I join their walking group. At first, I wasn't sure, it felt like something old people did, but I did think that it would get me out. We wouldn't walk that far, but we would chat, not always about having cancer, but I could ask questions and listen to other people. I would feel better after I had gone, because I had done something positive with my day. Some days it would be hard to feel positive and I would have to make myself go out' (Angela).*

Angela describes how the peer support she received was connected to the practice of walking. She articulates her reticence to engage in this practice, because walking in this context with a group, is a social practice that she associates with people older than herself, but she recognised that it could benefit her and *get her out*. Angela may

not have engaged with a social walking group if it were not arranged by this charity, and if the others walking were not empathetic to her situation. Her narrative suggests that engaging in the practice of peer support, which was offered by another person with Cancer, is what prompted her to take part, rather than the desire to engage in the practice of social walking per se.

Walking is a practice which could be described theoretically both as a dispersed or integrative practice (Harries and Rettie, 2016). It is present as a dispersed practice in numerous social practices, such as work, shopping, child care. People often walk around their place of work or walk their child to school. In this context, it is the integrative practices, such as the working and caring which carry the teleoaffective elements of the practice and dictate how the walking, as a dispersed practice, is performed. For example, the aim and rules of the walking is inherent to the aims and rules of the work practice; somebody might walk to the photocopier and back to their desk, or walk adjacent to and holding the hand of a child on their way to school. What Angela is describing here is organised group walks, which have a purpose which goes beyond just moving from A to B, or being integral to another social practice. In social group walking, walking is part of the teleoaffective organisation of the practice, because the walking is not incidental, but is one of the key aims being achieved. It is a social entity in itself (Harries and Rettie, 2016). In this context social group walking is an integrative practice, because it consists of complex sets of ‘multiple actions [and] projects’ (Schatzki 2010: 88). This type of activity enables people to socialise with others, walk in relative safety (compared to walking alone), improve their health and fitness and experience new places. It involves numerous dispersed practices such as talking, listening, map reading, following. For many group walkers they would have particular material elements which they associate with this social practice, such as walking boots, waterproof clothing and a rucksack, which they would not wear if they were walking to the shops, for example. What is interesting and relevant to this study, is that the group walking which Angela describes, involves two integrative practices combining, those of social group walking and peer support.

Both practices share some dispersed practices, such as talking, and listening, but crucially to this analysis it is the teleoaffective structure of both practices which

overlaps. Both practices have an end goal of providing the opportunity for socialising, whilst engaging in a physical activity which can improve both physical and mental health and is often described as improving wellbeing. Angela articulates this. She describes how she would talk during the social walks, meaning dispersed practices of walking, talking and listening would happen simultaneously. Her use of the word *chat*, suggests that she judged the talking to be informal, which is probably dictated by the space and the nature of trying to talk and listen whilst also walking. The chat would be happening whilst also navigating different terrains, following and staying in a group with the others, or possibly talking over different weather conditions like rain or wind. Her practical understanding of how to walk as an everyday mundane activity, enables her to combine these practices, which consequently has the potential to provide numerous benefits, such as getting information and advice about her illness, getting out of her home and improving her confidence. As she says, *I would feel better after I had gone, because I had done something positive with my day.*

**Zooming in on Space and Time**

The spatial aspect of where these two social practices combine is pertinent to this charity, in relation to their identity and aim to support people with their illness away from the clinical environment. The rules and ingrained social understanding of how clinical practices should occur, means that interaction between health professionals and patients mostly occurs in a hospital or similar clinical setting. The hospital as a physical and symbolic space, becomes a mediating factor within social practices which happen between health professional and patient (Nicolini, 2012). As an artefact, which includes rooms, offices and also the way equipment and people are arranged within the space, the hospital setting affects the practices which happen within it. As Nicolini (2012) recognises, doing medicine and caring within a hospital setting becomes an institutional practice. When one enters a hospital as a patient, one (often unconsciously) subjects oneself to medical discipline and temporality. The consequence of this is that some autonomy is lost, but this is balanced against the perceived benefits that modern medicine can offer.

To relate this to Angela's narrative, her meetings about medical treatments with healthcare professionals would not happen whilst walking across a field or along the

canal. Rules which have developed over time, such as rules about confidentiality, hygiene and professional boundaries, would such prevent help and support being offered in a different setting. The relative freedom, coupled with the peer element of the support offered by this charity, creates an opportunity for a different kind of help to be offered, which compliments, but is in addition to what is offered by the health service. Angela articulates this as part of her story, but also relates this to the temporal aspect of the practice;

> *'It is really important that there is somebody who can give you advice because you don't feel like you can ask at the hospital because it would take hours. You need someone who's done it to actually tell you all the tips what you need. To not feel embarrassed about the silly little things' (Angela).*

This suggests that Angela recognises and adheres to the boundaries and rules of the clinical environment, when she engages in the practice of attending at a medical appointment. She feels unable to ask some questions at the hospital because she recognises that this would take time and there are temporal boundaries to the practice, which are dictated by medical discipline and temporality. Getting peer support as part of the group walking sessions, where the rules about time and space and professional boundaries are more fluid, provides an opportunity to ask some questions about her treatment, which have not been covered in her medical appointments.

She relates asking some of these questions to feeling embarrassed or silly, but that in the context of the walk and with people who can empathise, she can overcome this. This links to research by Ferguson (2016), which employs a lens of mobilities based social science to study social work practice in child protection. His paper explores the mobile character of helping young people and their families, through his ethnographic study which observed social workers in their cars and moving round people's homes. He identified through interviews with social workers, that children and young people were often more open to speak with their social worker whilst travelling in the car. That the liminal and neutral space of the car, enabled some young people to drop some defences and speak more freely about the issues they were facing. His work also recognised that the forward motion of the car and the fact

that people's bodies are positioned side by side rather than face to face, is instrumental in why people felt more at ease.

This has parallels with the social group walking which Angela engaged in, where she was able to ask what she considered to be embarrassing and silly questions, whilst on the walks. The dual focus required to perform the dispersed practices of walking and talking, combined with a spatial relationship which does not require face to face discussion (for example walking side by side and looking at the landscape or people ahead), takes the focus away from what is being asked and the emotions which asking those questions might evoke. This is evident in the following data extract where Angela talks about a tip she was given by a peer whilst out walking;

> *'We'd talk about all sorts on the walk. I was once chatting to {Name} about issues with my drain bag. When you go to hospital, you get like a drain bag to carry your drains in, so {Name's} like, if you put a wooden spoon under your mattress, you can tie your bag to it and then it doesn't go on the floor. Oh my god, that so genius. So, you really need somebody to help you, especially when you feel embarrassed to ask. It just makes things so much easier' (Angela).*

All these elements of peer support practice, which is here combined with social group walking practice, is important in Angela's experience of connecting with this charity for support.

**Conclusion**

This chapter has employed a Social Practice Theory lens, to focus on the practices which occur in the three charities, as articulated through narratives of those who connect with them. Inspired by the work of Schatzki (2002), it has explored how the social goal of each organisation, is enacted in and through their practices and how those practices are driven by their teleoaffective structure.

Analysis began by discussing family support at Home-Start and how a range of dispersed practices, bundle together to form this type of help. I recognised that each volunteer responds to the needs of the family they are supporting, in this example it

was anxiety about leaving the house, and in response they engage in certain practices to meet those needs. Shopping as an integrated practice was explored, and that by accompanying the mother and child to the shop and engaging in this practice with them, it can help the mother both physically and emotionally. Focusing on this practice in this way has revealed how layers of support can occur, in what might be considered a mundane activity. It also discussed how volunteers at this charity bring a practical intelligibility to family support practices, which derives from their own experiences of being parents. That by engaging in practices *with* families, rather than either doing practices for them of telling them to do them, volunteers share their experience and knowledge in a supportive way, which is congruent with their organisational identity and social goal.

Discussion then proceeded to explore advice giving as an integrated practice at Citizens Advice. Echoing the findings from Home-Start, the bundling together of dispersed practices to become advice giving, depends on the issues that the advice seeker describes to the adviser. It recognised that advice giving is a communicative practice, which varies according to the context. It zoomed in on listening as a dispersed practice and how important this is when offering advice. It described the different processes of listening as defined by Worthington and Bodie (2017) and proposed that the affective process of listening is compatible with and driven by the teleoaffective structure of advice giving as a practice. This section also considered emotions, and how the volunteer had to rely on his practical understandings of doing advice giving, which he has developed through training and experience, and which enabled him to respond effectively when faced with an angry advice seeker.

Finally, it discussed peer support as a practice at CancerCare and how this was an important element of the support they offer at the charity. Drawing on the narrative of a young woman who had connected with the charity for support after a breast cancer diagnosis, it focused on a peer support group were participants engaged in social walking as an activity. It discussed how walking is an integrative practice in this context and that elements of it overlap with peer support as a practice, for example, talking, listening, socialising. That these two practices combine and share the same end goal or telos of improved wellbeing. Taking a deeper analytical approach, it zoomed in on the temporal and spatial aspects of social walking as peer support, to

explore how the aims and identity of the charity are met in this practice. How it's identity of being complimentary to, but discreet from medical services are experienced through this practice. For example, in the lack of time constraints to get support whilst out walking with peers, compared to time bound hospital appointments.

This analysis of the interview data, with a focus on practices, has revealed the connection between need, organisational aims and identity, and practices. That the practices which have been observed in these charities vary and are responsive to the needs they endeavour to address and that the doings and sayings of those practices are affected by the organisational identity and the material and human resources that the charity accesses. The teleoaffective structures of the practices combine with the practical understanding and intelligibility of the practitioners, to create bundles of practices which strengthen and validate their identity and enable them to endeavour to meet their identified social need.

# Chapter Ten - Discussion

### Need

All the charities in this study recognised a need in the community, which informed their identity as expressed in their mission and aims. A key finding from this research is that organisational identity, understood as the central, distinct and enduring features of their organisations (Albert and Whetton, 1985), is derived from an identified need. What that need is and who are the people that need help, informs their organisational identity and that identity is consistently co-produced in numerous ways, throughout the organisation. As evidenced in the empirical chapters, their identity pervades various aspects of their organisations, from their resources, such as their buildings and their people, their publicity, reports and also in their practices.

When considering how charities sustain their operations despite a challenging environment, understanding the different needs which charities endeavour to address is important. Charities have a complicated role when it comes to meeting needs. They respond to a need which they have identified in their community and develop a service which aims to address that. They also have to meet the needs of those who fund them and as part of the wider third sector, they also choose whether they attempt to meet the needs of the government and step in to fill new gaps in services as they arise. I conclude from my analysis that the three charities in this study have continued to focus on the need which they originally identified, and whist elements of those needs have diversified over time, their original aims, which informed their organisational identity have endured. Some charities may attempt to meet a range of different needs, in response to new funding opportunities and alter their identity to achieve this, these charities have maintained their original need as their central aim.

### Need Diversification and Increase in Demand

The need which Citizens Advice aim to respond to, has diversified over time in response to societal changes and advancements. From originally helping with navigating the (then new) welfare system, to helping people with rations and issues

relating to war, to help with debt management as a result of national recessions. However, the need for free and confidential advice underpins all these issues, but this charity has had to respond and be flexible to the different ways this need for advice manifests itself. Furthermore, they have had to respond to changes in systems and the ways they maintain their knowledgeable position within the advisor, advisee relationship. For example, developments in technology provide greater access to information for advisors but creates new systems for the advisors to understand and advise on. At CancerCare, the need which they aim to address is much more static. Although treatments for cancer have developed since the charity's inception, the wider social issues which a diagnosis brings to those affected, has remained constant. The founders identified (and this was evident in the interview data), that the wider issues people faced when coping with a cancer diagnosis, such as lack of self-confidence, anxiety about their future, issues integrating back into "normal life" after treatment, were consistently not being met sufficiently by the NHS, due in part to a lack of funding, but also because of dominant ideology within oncology health services which focuses on physical health. Similar to CancerCare, the need which Home-Start aims to meet has remained relatively static. For them, cuts to Local Authority services, particularly children's centres, has led to an increase in demand for their service, with families who used to get support from the state, no longer able to do so. Some charities which operate within a similar space, have chosen to take on functions which previously were delivered by the state, such as working with children on the edge of care, but this Home-Start charity has not done that. They have continued to offer outreach family support and tried to meet increased demand by self-producing volunteers.

The data from the three charities has shown that through responding to the changes in the need they hope to address, their organisational identities have endured. It recognises that a strong identity, which underpins all aspects of their organisation, enables them to be responsive to diversification of need, or increase in demand for their services. Albert and Whetton's (1985) theory of Organisational Identity, as introduced in Chapter Three, was a useful framework to identify the central, enduring and distinct features of the organisations and particularly when setting the scene of introducing the organisations, but it is less useful when considering sustainability

over time because it negates to account for the dynamic nature of organisational identities.

This research has identified that the charities' identities are consistently co-produced through the stories people tell about the organisation, through reports and social media and also through their resources and practices. Identity was recognisable in all aspects of their operations and is consistently reproduced and reaffirmed in a dynamic process that allows and enables flexibility to change in the economic and political environment. I imagine it being like DNA, where each different representation, articulation or reproduction of the identity represents a molecule, which attaches to the double helix, which acts as a strong, but flexible structure to hold all the elements of identity together. In the same way that DNA can replicate itself, so too can organisational identity. In answer to the question of what can be learned from studying charities which have survived, it is that charities need to be responsive and flexible to how and why the need they aim to address changes over time, and that they are able to achieve this by consistently reproducing their identity, but maintaining the defining features of it.

**Identity and Resource Mobilisation**

Resource acquisition and organisational sustainability are inextricably linked. As this study has confirmed, charities need both material and human resources to operate. By adopting an RMT lens to focus on how each charity accesses and uses their resources, this research has revealed the importance of both the need they aim to address and their identity in this endeavour. Both shape their fundraising practices, how they arrange and use their buildings, and how they aggregate and use volunteers in practice. An example was provided in the exploration of CancerCare's fundraising strategy, which revealed that they were able to mobilise those who benefitted from their support, to fundraise on their behalf. Their articulations of the charity's identity, through their stories of how they were helped, especially when told to their private networks of friends and family who have an invested interest in their recovery, inspired generosity and gifting. In addition, the nature of the need a charity aims to address, impacts on their ability to access resources. This was described by a trustee from Citizens Advice, who recognised how challenging accessing private donations is, because of what he perceives to be the prejudice of others towards

those who access support from their charity. Therefore, they had to target specific funds, or consider self-producing their own monetary resource by generating income (in that case from training).

Focusing on buildings as a resource, this research revealed how organisational spaces are a key element in how charities communicate and perpetuate their identity. Each charity utilised their space differently, to achieve their aims and create different atmospheres. Both visual and narrative data revealed how each charity mobilised their material resources in a particular way, which related to the services they offer, the people who they hope to help and importantly the relationship they have with those people. Citizens Advice's space is more formal, which reflects their professionalised approach to helping people. Stories from both those who connected with the charity for support and volunteers, recognised a distinction between advisors and advisees, which related to knowledge and power and this is reflected in the arrangement of their organisational space. Home-Start have created a space which is informal, with areas being organised like a family home and their space being multi-functional, with no areas designated for staff only. This reflects their central feature of parents helping parents, where the focus is on working together with families and creating an atmosphere which is reminiscent of a family home. CancerCare use their space to create a safe haven for people affected by Cancer, which is purposely different from the hospital environment and provides a space for social and psychological support to occur.

Social and economic changes also affected the charities' ability to access human resources. Acquiring and training volunteers is fundamental to all three charities and social and economic changes can impact on their ability to do this successfully. All found strategies to sustain volunteer recruitment, for example, Citizens Advice rely on volunteers who have recently retired and seek a purpose in retirement. As the narratives from their volunteers detailed, this charity's professional approach and the skills and attributes which they attract, appeals to this demographic. Despite difficulties in the economy, which could prevent people from volunteering, this charity accesses volunteers who are less affected, because they are no longer part of the workforce. Home Start and CancerCare adopt a different approach which is described in the RMT literature as self-production of their human resource.

Home Start train parents who originally connected with them for support, are keen to develop their skills, and have a desire to “give something back” to the charity. Similarly, CancerCare recruit people who have been affected by cancer and want to share their experiential knowledge of coping with the disease with others. Adopting self-help and mutual aid as a form of volunteering is a key element of both charities’ sustainability. This is not entirely unproblematic as one of the narratives from CancerCare highlighted, because volunteers who become involved in this way often move on, or feel like they have “done their bit”, which leads to a high turn-over of volunteers. However, as discussed in Chapter Eight, unfortunately people will continue to get cancer, it is not a need which is bound by time or place (although research for a cure may become a reality in the future) and therefore their pool of potential new volunteers is unlikely to diminish.

The data has confirmed that successful and continued acquisition of resources is essential to sustainability and that central, distinct and enduring organisational features impact on this, as does the need they aim to address. Adopting an RMT lens has been useful to explore how each organisation has used different strategies to access their resources and to analyse how they continue to mobilise them effectively. It has been particularly useful to observe how two of the charities have self-produced their human resource and how this contributes to a cycle of resource production. What this research has also identified is that resources affect and become embedded in practices. At one level material resources are elements of practice (Shove et al, 2012), but I argue that there is a deeper layer of connectivity between resources and practices and specifically between human resources, emotions and social practices, which enable the charity to meet its identified need.

**Practices and Sustainability**

An exploration of the bundles of practices, has provided an insight into how the charities mobilise their human resources effectively, to help those in need. By focusing on practices when analysing people’s stories, I have been able to identify different layers of support that each charity offers. The practices that I focused on involved volunteers providing help and they showed how, what might seem like a relatively simple or mundane support intervention, such as accompanying someone to the shops, can have numerous benefits and meet a number of needs. By zooming

in on the emotions and the way in which these guide the teleoaffective structures of the practices, I have been able to unpick those benefits and understand how volunteers as a human resource, with the experience and knowledge they bring to the practices, are vital to a charity's successful operations.

An exploration of the practices, with a focus on emotions, provided an insight into something I was curious about from my own practice, which was whether sustainability was linked to a charity's ability to engage in more relationship based activity. Whilst it did not focus on relationships as such, the analysis revealed how time, space and emotions are important elements in the charitable practices and this, from my experience of working for the Local Authority, does make them distinct to government led services. For example, in the narratives from CancerCare, people described how their appointments with medical professionals were bound by time and happened in the clinical environment, where there are particular rules and protocols. However, this was not the case when they received support via peers from CancerCare. Support happened as an organic process, was less bound by rules, and was more person centred and needs focused.

As a social worker, one's professional identity is dictated in part by the government and the media, and therefore relationships built, and practices engaged in with those in need, are affected by that identity. Being employed by the Local Authority, meant I adhered to organisational standards and protocols which impacted on the time I spent supporting people and the interventions I was able to engage in. Furthermore, showing or being guided by emotions was not encouraged, because it could impede my ability to deliver services in a timely and efficient manner, and could affect my position as a detached, professional who was there to carry out statutory duties. This research and especially the chapters which have focused on the people and their practices, has highlighted an important element of the work of these charities, which is their flexibility in meeting needs and how they allow emotions and an empathetic approach to guide their services. The practices are driven by teleoaffective structures which relate to the presenting need at the time. Often the volunteers engaged in the practices, are informed by practical intelligibility which is born out of personal experience, such as parental experience or experience of living

with cancer. The identified need becomes the central and guiding factor, rather than a need prescribed by protocols, procedures or time.

Whilst arguably social work practice within Local Authorities should be needs led, the reality of high caseloads and a focus on bureaucratic systems means sadly, it is not. I would argue that this different approach is relevant to sustainability because it relates to the gap that charities fill in welfare provision. It might not be considered critical to survival, for example charities such as Citizens Advice take an approach which replicates services offered by Local Authorities and sustain their services. However, it illustrates the added social value which some charities bring to communities, which may not be essential, but is desirable and emphasises the important roles they can play in welfare provision. These findings which focus on practices, offers useful insights into the differences between charities and statutory services and has the potential to contribute to future knowledge about the distinctive features of not only these charity's, but research within the third sector. An area for future research could be a comparative study between the practices engaged in by statutory services, for example social workers, and of a charity offering similar interventions.

**Survival Dynamics**

In response to these findings, I propose a concept which I describe as the *survival dynamics* of charities. The choice of words is important in both explaining, understanding and applying this concept. The term 'survival' describes the state or fact of continuing to exist, typically in spite of an ordeal, or difficult circumstances. All three charities have continued to exist in challenging and changing circumstances. This research has highlighted that those circumstances have been more challenging for some than others, but all have had to cope with reduced public spending and recession, and the different policies which have been introduced by different governments. Using the word survival recognises the challenging circumstances that these, and other charities exist within. The word dynamics relates to the forces or properties which stimulate growth, development, or change within a system or a process. The methodological approach I have taken has explored each charity as a social process, and recognised that this process is co-produced with a range of

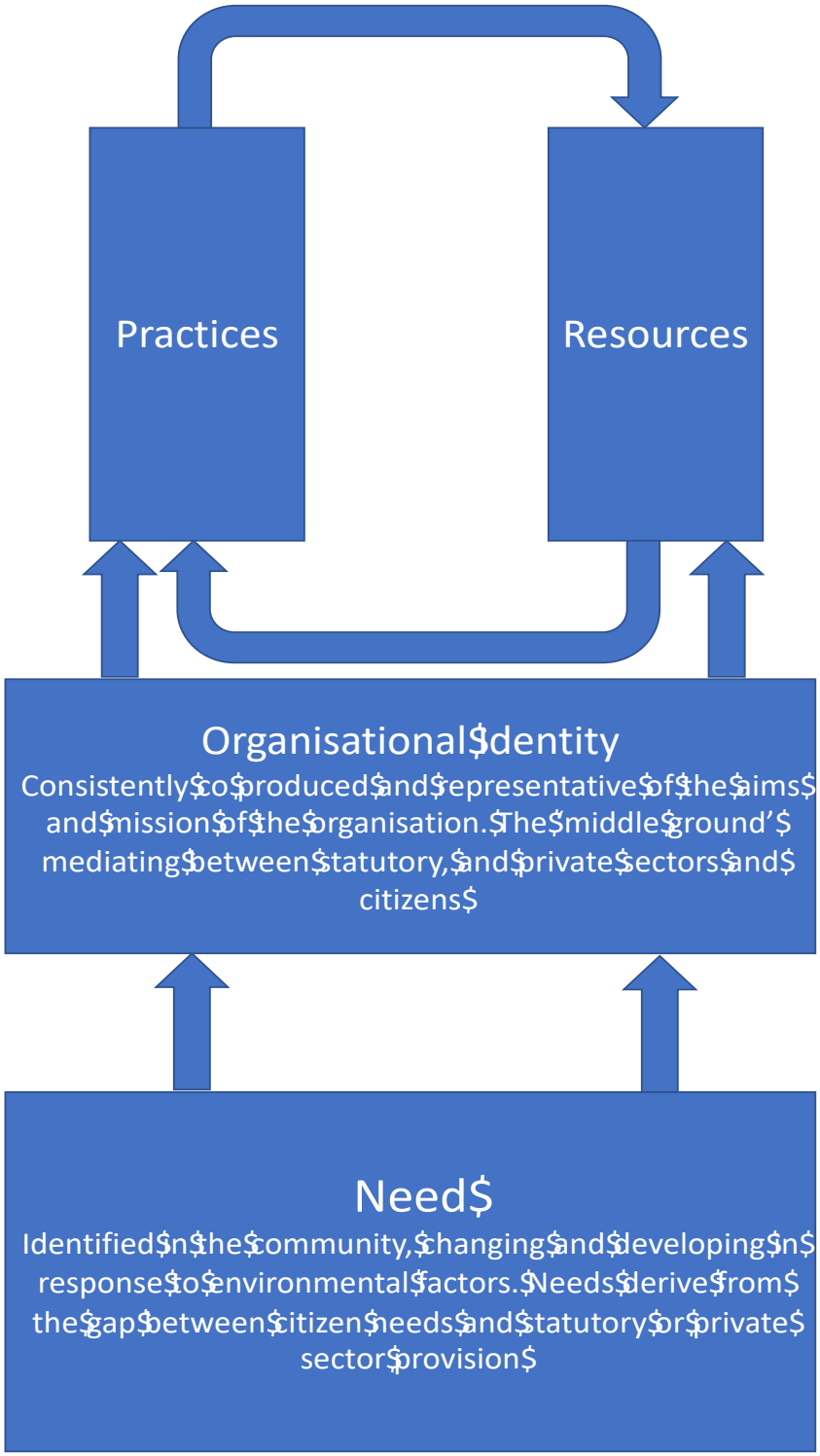
stakeholders. That charities evolve and adapt to the environment, but also that some essential elements of their organisations endure.

The term survival dynamics captures how sustainability for a charity, involves them constantly being responsive to the environment in which they exists, whilst retaining situationally co-produced identities that shape how the environment is engaged with. This research has captured and analysed how organisational identities are co-produced in numerous aspects of the work, through the conversations which happen in offices, the reports they write, through their website design and through the layout of buildings. At the heart, or centre of all three organisations in this study, is a need which they hope to address, and this influences every aspect of their operations.

Needs emerge from society and as already discussed, represent a gap in public service provision. The nature of the need and what is deemed necessary to meet it, influences and inspires a charity's organisational identity and informs what becomes its central and distinctive features. The nature of the need and features of organisational identity are then critical to the resources that are required to meet the need and how resources are accessed and mobilised. The practices which the charity engage in, are guided by the need and identity, and the resources are an essential element of the practices. Figure 10.1 illustrates this concept in diagrammatic form.

Survival Dynamics Diagram

Figure 10.1



I propose that the need, their organisational identity, their resources and their practices are all properties, or factors, which stimulate growth, development and change, and that they are vital to sustainability and survival. All inform each other and are co-produced through actions, words and materiality. The need informs the start of the process and remains the foundation of it and the feature which underpins all the other factors.

Recognising and understanding these factors is useful for other charities who may be struggling to sustain their operations. The charities in this study have been responsive to the original need they identified and have shown consistency in their organisational identity, which is variously communicated through different aspects of their organisation. Understanding how the need and a dynamic, but enduring identity impacts on resource acquisition and mobilisation is useful, particularly when considering how material resources, such as buildings communicate identity and the impact this has on those who connect with their organisations. It also prompts a focus on the practices, which may be taken for granted, but are a significant element, especially in relation to how they meet the need they hope to address in a way which is distinct to other types of organisations.

**From Research to Practice: Story of Dissemination**

As I was writing the final chapter of this thesis, I was pleased to be invited by one of the charities to attend their annual general meeting. It was a wonderful event where a range of stakeholders came together to celebrate the achievements of the charity. I had the opportunity to speak with people who had contributed to my research and informally disseminate some of the findings and conclusions I made.

I told them (not the confidential details), about some of the wonderful stories people had shared about the difference the volunteers had made to their lives, and how they had felt supported. That through my analysis, I had recognised that the identity of the organisation was clearly articulated within the narratives and how this informed and underpinned the practices which people described. Also, how I had identified that some of the practices which volunteers engaged in, that might be considered to be

mundane and not especially important, were having a significant impact on those in need of support. That the analysis of those practices, of the doings and sayings involved, revealed the multi layered support which a seemingly mundane task could provide. For example, I talked about the different elements of help associated with accompanying a family to the supermarket. That this involved practical support, but also emotional support and how the impact of this was not confined to that practice, but it filtered into other practices and when combined with other supportive practices, it helped those families in need.

The staff were interested about generating similar data for their impact reports, but voiced concerns about how they might capture, or articulate this to funders. They told me how they do ask for feedback from people who connect with the charity for support, via feedback forms, but that they are aware of numerous occasions where people say in passing how much the charity has helped them, but it is not documented and therefore is “lost” as they put it. That people will say on home visits, or in the kitchen at a group event, or on trips, about how much they appreciate the charity and the support provided and although this reassures the employee or volunteer about the success of their work, it does not help in their endeavour to demonstrate the impact and social value of the service they provide to funders.

This led to a discussion about ways to capture and document those ‘off the cuff” remarks and being proactive in encouraging and facilitating employees and volunteers achieve this. That feedback gathering practices, such as giving out forms and asking for verbal feedback should not be confined to certain contexts and time within the relationship with families. For example, that feedback is only sought at the final meeting before families are closed to the charity and that it involves filling out a generic form. That gathering feedback could be integrated in to regular activity and employees especially, could be prepared to respond at times when it is offered voluntarily. I told them about dictaphone apps for mobile phones, which are free and easy to install on smart phones (all the employees have a smart phone provided by the organisation) and could be used to record comments. We recognised that it would be impossible and inappropriate to record all meetings, however, if a positive story was told, or feedback was offered, with permission a recording could be made

of them re telling the story. This could be transcribed, anonymised and saved for reports and future funding applications.

This discussion developed to consider how once feedback in the form of narratives was acquired, how it could be analysed and used in funding applications and reports. The charity was interested in finding ways to document and illustrate these narratives, which mirrored the analysis from my research, but was not theoretically complex and overly time consuming. This discussion inspired and informed the framework which I outline in the next section of this chapter and which was co - produced with the charity.

**The Framework**

The framework develops the use of narratives within the third sector, by prompting those responsible for evaluation in a charity, to analyse, not simply reproduce, the storied accounts of those who connect with their charity for support and those who volunteer for them. Thus, creating a new form of evidence, which details the impact their charity has and the added social value it brings to communities. By focusing on people's experiences, as captured in their stories, it provides a method for identifying and analysing the needs of those who connect with their charity for support and how these needs have been successfully met in practice.

In response to the findings of this research, the framework is underpinned by a recognition that the needs charities endeavour to meet, are multifaceted. That there is an overarching need, such as advice on benefits, or need for family support, but that when charities start to address those needs, they unlock, or reveal a range of needs. For example, someone may initially connect with a charity for advice about debt, but this may lead to a recognition that they would also benefit from support with their mental health or housing. As the data from these charities has detailed, this needs-led approach, which many research participants described as being in contrast to the more procedural and time bound approaches they experienced from other services, is important and should be articulated. This framework allows charities to analyse this web of needs and evidence the various ways they help people and offer social value, including the value of time.

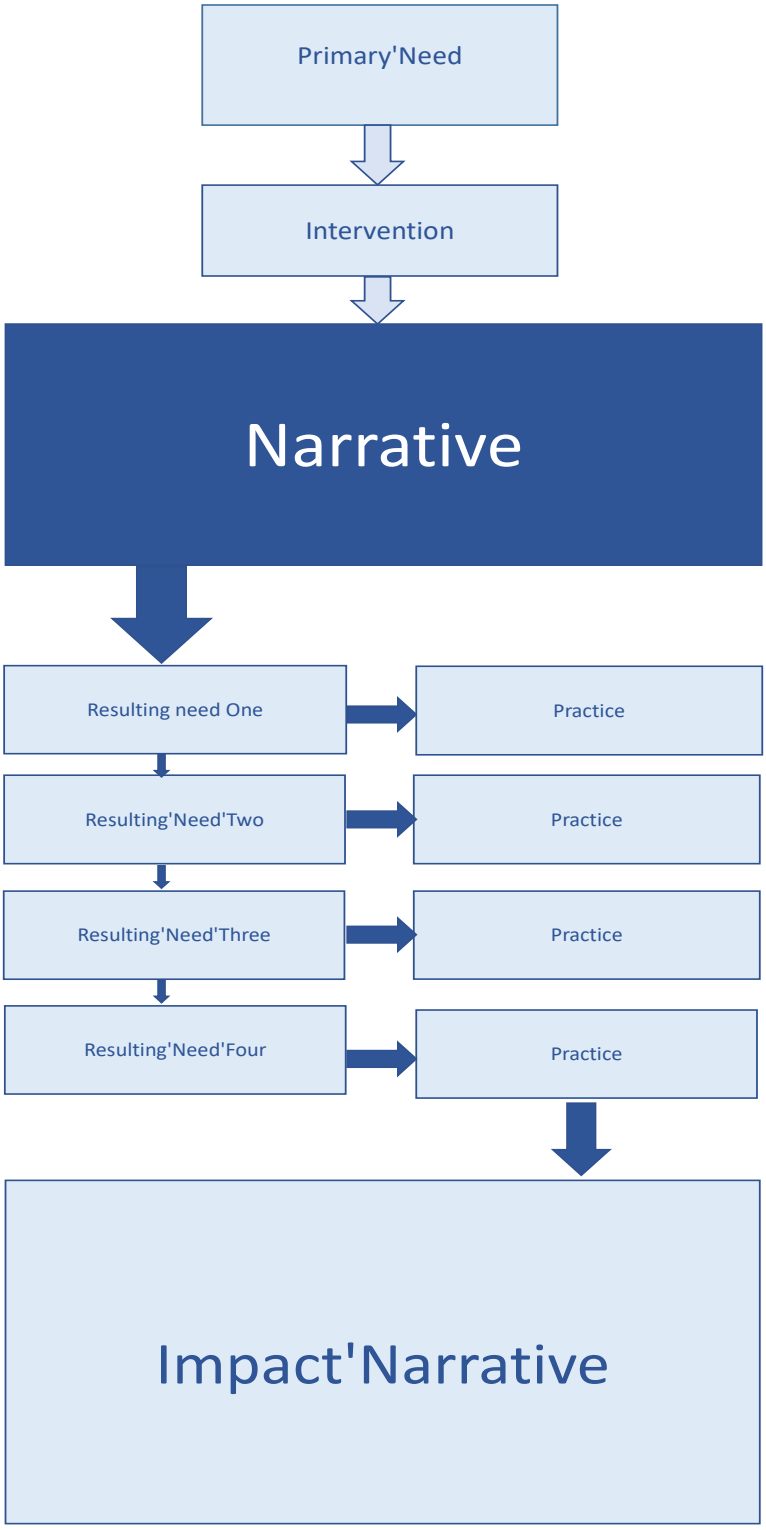
It highlights the complexity of needs which charities are presented with, which sometimes, because they form part of the daily support they offer, can be lost within evaluations, due to becoming almost mundane and taken for granted within their organisations. Adopting this analytical approach, enables a charity to look for the layers of support they offer, which is valuable to communities and is often not offered by other services.

The framework is documented via a flow chart (see Figure 10.2), which prompts an evaluator to firstly identify the primary need. The example given in the sample chart in figure 10.3 is that of a young mother who needs family support for herself and her three year old child. It then details what support that charity has put in place to meet that need, which is a weekly visit from a volunteer family support worker. The next box on the flow chart is for the narrative offered by the person who has been helped, which using their words verbatim, will document their experience of receiving support from the charity. This places their voice at the centre of this framework, which highlights the importance of user experiences and values them as stakeholders within organisations. These stories, or excerpts of stories, require close reading. Whilst it is recognised that this process is time consuming when analysing transcripts of lengthy interviews, however, this is just small sections of narratives, as the example shows.

The different needs, as articulated in the stories, are then listed in the boxes below. There are four boxes in the example provided, but this number can vary depending on how many needs are articulated and then identified. From those needs, the intervention practices are detailed. That information is then combined for the final box, which I describe as the Narrative Impact Value Framework.

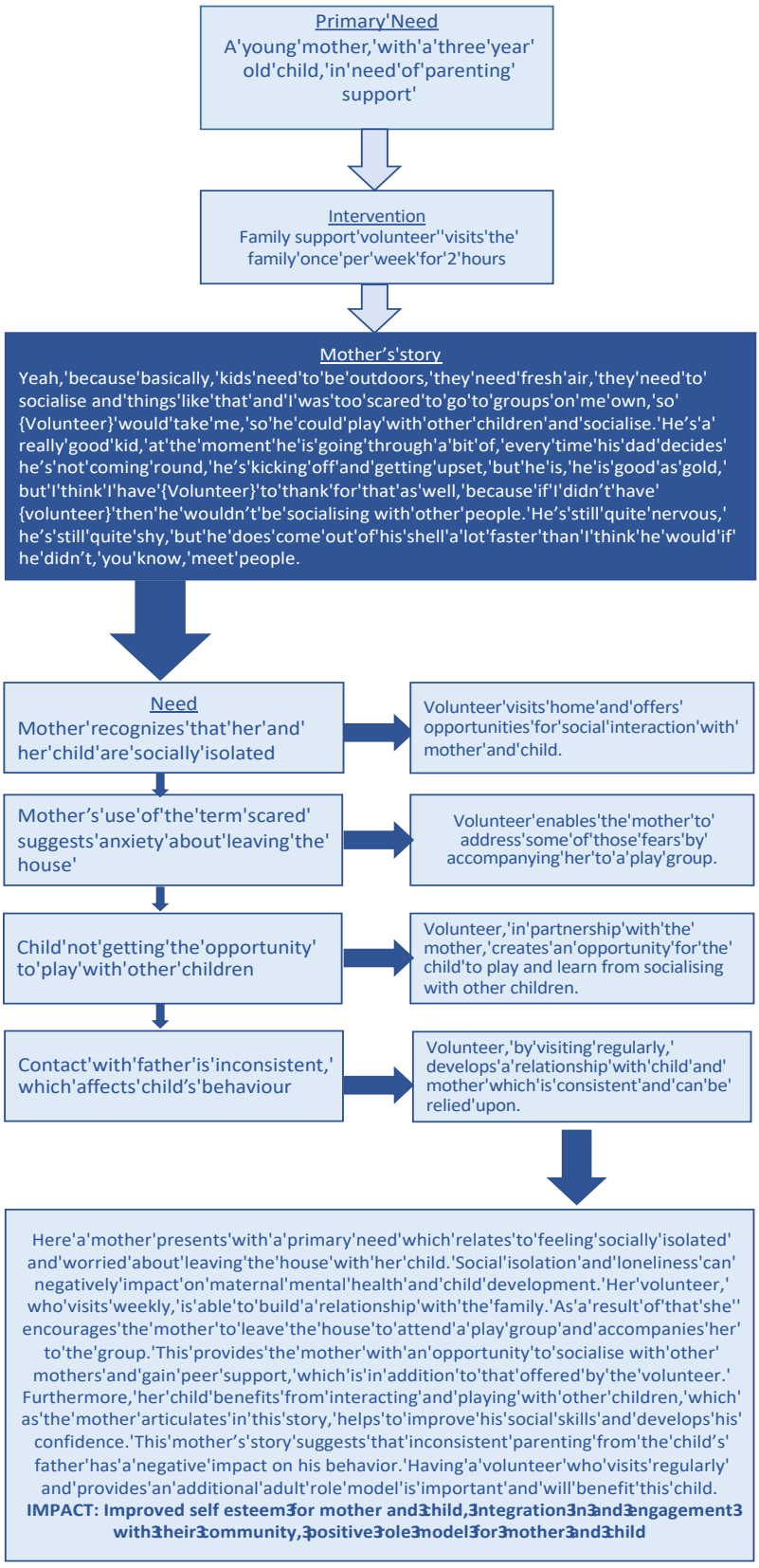
Narrative Impact Framework

Figure 10.2



Narrative Impact Value Framework Example

Figure 10.3



At the time of writing up this thesis, the charity have said that they will trial it as an evaluation tool and provide feedback on whether it is useful for them in practice.

# Conclusion

The objective of this thesis was to explore charities and sustainability, with the focus on three small/medium sized charities, which have sustained their operations. I came to this research from social work practice and, whilst working in partnership with charities as a social worker, I observed how they were playing a fundamental role in welfare provision. I also became aware of how a number of charities ceased to exist. It prompted an interest in charitable sustainability and whether it is related to their approach, which I observed to be distinct from what I was able to offer as a Local Authority employee. Or was it simply based on resources and which charities could sustain funding? This provided the basis for my research questions (as recapped below). The ensuing discussion will address these, to demonstrate how the research outcomes outlined in the preceding empirical chapters, challenge or advance the third sector literature and fulfil the original research aim.

> *How do charities sustain their operation in the context of the profound social and economic changes, which have occurred in the UK over the last three decades?*
>
> *Are there specific elements of organisational practice which contribute to sustainability, and if so, can this be used to help other charities which are at risk of closing?*

Confirming my practice experience, and as discussed in the literature, charities play an enduring role in the provision of social welfare in the UK and this was evident in the data from the charities in this study. All provide a service which meets an identified need in the community in which they are based. Their independence from government forms part of their definition as stated in law, yet despite this independence, as detailed in Chapter Two and Six, social and economic changes, influenced by governmental ideological perspectives, does impact on them. For example, both Home-Start and Citizens Advice were affected by cuts to Local Authority funding. However, this impact can vary between organisations, with exogenous factors affecting some charities more than others, or in different ways. CancerCare, for example, who are predominantly funded by private donations, were

not directly affected by the same government funding cuts. The qualitative data analysis in the present study has recognised and discussed the exogenous factors which affect charities, and has empirically explored the endogenous factors which contribute to sustainability.

Chapter Six detailed how the charities in this study were formed, and how founding members identified an un met need, which was either specific to a particular demographic, or is a feature of society in general. For example, a need for free advice for those navigating the welfare system, a holistic approach to helping people with cancer, or peer support for families. Evidence of these unmet needs, were told in the stories of those who connected with the charities for support, with comments such as I *don't know where I would have been without* the charity, or as one of the research participants who connected to Citizens Advice said, he would g*et by, but would struggle*. Both employees and those seeking help recognised that either public services did not exist, or were lacking in meeting a particular need. Or, that private services were inaccessible to some because of cost. For example, massage for people affected by cancer or legal advice for people facing eviction.

The gap that each charity in the study aims to fill, could be described as being "wider" if the service they provide is not offered by the state. For example, currently there is not a state led service which offers free advice for issues relating to welfare in the city where Citizens Advice is based. If they did not exist there, people who require advice about employment rights, for example, would have to pay a private company for it, or try to work out their issues for themselves. Whereas the state does employ family support workers and provides some early help for families (though these services have been affected by austerity). Therefore, because Citizens Advice mediates directly between public and private services, the gap which Citizens Advice fills, could be described as wider.

The gap which the other two charities fill could be described as narrower, because CancerCare and Home-Start are more aligned with public services; the NHS and Children's Social Care. Elements of what they provide, are available in these government led organisations. Despite these inherent connections and this 'narrower' gap, the data revealed how they communicate a distinct approach to

these services. This creates the impression that the gap is wider and justifies their position. The people who connected to those charities, explicitly stated in their stories how their experience at the charity was different to statutory services. For example, at CancerCare, people articulated the difference between attending hospital, and at Home-Start people talked about the differences between the volunteers and social workers. This suggests that an element of their sustainability relies on them justifying their existence and highlighting a gap in services and making it seem “wider”. At Citizens Advice, the distinction to state services was not communicated and indeed the data from their charity focused on how they are similar, for example, in their professionalised approach and those who connected with them for support assuming it was run by the Local Authority. They do not need to communicate that gap, because it clearly exists.

For all three charities, this middle ground between the citizen and the state, is relevant to sustainability, it justifies their existence forms part of their central and distinct features and enables them to access and mobilise resources. For the people who could be described as ‘falling into gaps in services’ (the people who connect with those charities for support), the charities play a pivotal role in dealing with their issues, they become their safety net. The narratives in this thesis have illustrated how important these charities become to people, and how this encourages and inspires them to connect with them in different ways, such as becoming a volunteer, or a fundraiser. This research has shown that in the charities where I describe the gap as being narrower, this connection with the people who use their service is an important factor in how they survive. They create a sense of solidarity and people help the charities to articulate the gap in services and justify their existence.

On drawing this thesis to a close, it is pertinent to reflect upon the research undertaken and its potential limitations. I recognise that the data represents a snap shot of the three charities, from a particular time and as told by a relatively small number of research participants. Whilst I felt it was important to involve participants who connected with the charities in different ways, for example trustees, people seeking support and employees, to hear a range of experiences, this reduced the sample size for each type of participant. Although I felt that having three research

sites was useful, I would have liked to undertake more interviews within each charity, and with each group of people who connect with it.

What I consider to be one of the strengths of the research, I also recognise could be perceived as one of its weaknesses. Adopting three different lenses to analyse the data provided a range of findings, which has contributed to third sector research by introducing new ways to theorise the sector. However, I am conscious that this prevented detailed or focused work on a specific theory. I recognise that using RMT as a lens enabled a novel exploration of charitable resources and particularly organisational spaces, which produced useful insights to how space impacts on survival. Similarly, adopting a social practice lens, created a new way of analysing charities, which does not take for granted the numerous practices that are involved in helping people and making a difference to people's lives, but draws them to the fore and makes explicit the contribution charities make to people's lives. However, I also acknowledge that my use of organisational identity theory was much more superficial and simply provided a framework for introducing the charities, set the scene and use the features of organisational identity theory to do this.

I aim to apply the framework developed and offer it as a tool that these and other charities might use to evidence their work. Once applied this offers an additional mode of data collection to other researchers and the charities themselves. Issues of consent and data protection would need further clarification and I look forward to continuing this work in progress.

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# Appendices

## Participant Information Sheet

***Whose Value?*** *Exploring social value and impact through the voice of charity users and employees*

My name is Cath Hill and I am a PhD student at Lancaster University in the Sociology Department.

**Invitation**
I would like to invite you to take part in my research study. Before you decide, you need to understand why the research is being done and what it would involve for you. Please take time to read the following information:

**What is the study about?**
This study aims to capture the opinions and perspectives of people who have chosen to seek help from a charity. I am interested in your personal stories, but also how individuals understand the contribution of charitable services to society.

It is hoped that this research will help charities, and the people who fund and use them, to more fully understand the value of this sector to individuals seeking help and to society. The study also aims to ensure that the voice of those using services feeds into how we evaluate the work of charities.

**Why have I been approached to take part?**
After I visited the organization which you connect with, you expressed an interest in taking part in this study. With your consent, the worker from that charity has passed your details on to me, so that I can make direct contact with you

**Do I have to take part?**
No, taking part in this research is voluntary. It's up to you to decide to take part. If you would like to leave this project at any point, that is not a problem.

**What will I be asked to do if I take part?**
If you decide you would like to take part, you will be asked to attend one, or possibly two research interviews, which would be arranged at a time and place to suit you. Each interview will take no more than one hour. If you agree, I will record the interview using a digital audio recording device. If you

following the interview, to request this. After that period your interview will be anonymized, so it won't be possible to withdraw the material.

**What about confidentiality? Will my data be Identifiable?**
The information you provide is confidential. We only store anonymised electronic transcripts (all names or other readily identifiable personal material, including the

name of the service is removed and replaced with code). You will not be named or identified. The data gathered will be encrypted and will be securely stored in accordance with the terms of the Data Protection Act (1998).

Recordings will be deleted at the end of my analysis of them and any hard copies of transcribed interviews will be securely stored in a locked cabinet and destroyed after the study concludes. Electronic copies of the transcripts will be securely stored for an indefinite period in the UK Data Archive, and at Lancaster University.

**Who can I contact if I have any concerns?**
In case of any concerns or complaints in regards to this research, please contact:

Professor Corinne May-Chahal
Email: c.may-chahal@lancaster.ac.uk
Tel: 01524 594104 or

Or, Professor Karen Broadhurst:
Email: k.broadhurst@lancaster.ac.uk
Tel: 01524 594126

I really appreciate your help with this. If you have any questions about my research, or would like to see a copy of the findings, please ask or contact me. My phone number and email address are at the bottom of the page.

Thank you again for your time. I look forward to hearing your story.

Cath Hill
Lancaster University
Lancaster
LA1 4YN

Email: c.hill1@lancaster.ac.uk
Work phone number: 01524 393156

**Consent Form**

I, the undersigned, confirm that (please tick box as appropriate):

| | | |
|---|---|---|
| 1. | I have read and understood the information about the project, as provided in the Participant Information Sheet. | ☐ |

| | | |
|---|---|---|
| 2. | I have been given the opportunity to ask questions about the project and my participation and I understand that the researcher is available should I want to ask further questions (contact details on Participant Information Sheet). | ☐ |
| 3. | I voluntarily agree to participate in the project. | ☐ |
| 4. | I understand I can withdraw at any time without giving reasons and that I will not be questioned on why I have withdrawn. | ☐ |
| 5. | I will not be identified in the research; all personal details will be kept private by the researcher | ☐ |
| 6. | I understand that parts of what I say may end up being used in an anonymised form (no personal details) in future research publications | ☐ |

**Participant**

_____ _____ _____

Name of Participant Signature Date

**Researcher:**

_____ _____ _____

Name of Researcher Signature Date