When volunteers become managers: identity work at a heritage railway

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PhD Thesis submitted December 2023

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ABSTRACT

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Volunteer-using organisations are complex and variously organised, ranging from those managed and led by paid workers to those that are entirely volunteer run. Despite much research recognising the difference between volunteering and paid employment, when discussing management processes, voluntary organisations are frequently likened to those with paid employees, with much attention given to volunteer management as a paid role. However, in practice, there may be significant differences across various forms of not-for-profit organisation, including the ways in which volunteers become managers as well as their management experiences.

My thesis investigates how volunteers navigate the experience of becoming managers in a complex safety-critical environment at a heritage railway, as they take on responsibilities in an environment that is similar to the national rail network, and controlled by the same statutory regulator. The structure of the heritage railway is complex requiring volunteers to undertake a range of activities to cover all aspects of running the railway. Using an ethnographic approach as an insider participant observer, and a dialogical narrative analysis framework, I explore the identity work of participants volunteering in management roles. I examine different volunteer positions at three locations – stations, workshops and the locomotive footplate, and find that volunteers transitioning to an activity that involves responsibilities for managing others demonstrate a rich variety of approaches to their transition as well as to identity re-construction.

This study explores the navigation and complexity of the routes of volunteer entry into the organisation; the different experiences narrated by volunteers of becoming a manager, and tensions around boundaries as they engage in identity work undertaken when holding multiple positions. This study contributes new insights into some previously under-researched areas of volunteer management by other volunteers.

ACKNOWLEDGEMENTS

It has been a long and rocky road to complete this thesis and it would never have been finished without the immense support provided by many people.

My list of thanks starts with my supervisors, Professor Katrina Pritchard and Dr Rebecca Whiting. Katrina has been with me from the inception of the project and I am sure Katrina's patience must have been sorely tried on a number of occasions but she has always been totally supportive my efforts. Her challenges to my thinking and writing have been immensely helpful and without her support and guidance throughout the long period of completing this project on a part-time basis there would be no thesis. Rebecca has been highly supportive, and critiqued my thinking in ways that have greatly improved the final result. Rebecca also provided invaluable help to me to find my way through bureaucratic processes when I had to break my studies on two occasions for health reasons.

Doing a PhD at any time is a challenge; doing it part-time at a distance from the university, because of both the physical distance and the Covid-19 pandemic made it sometimes seem a very lonely process. My peers in my PhD cohort at Birkbeck, University of London provided valuable support, particularly during some personally difficult times, so thank you Jane, Jamie, Adrian, Helen, Mark, Sam, Christine and Paula.

The thesis would not exist without the cooperation, help and enthusiasm of many people at Country Railway – the gatekeepers, the participants and other volunteers who cannot be named. They gave their time gladly and shared their stories. Being a volunteer and a researcher in the same organisation provided me with many

challenges which would have been much harder to overcome without the help I received from many people.

I would also like to acknowledge the help and advice I received as a volunteer over more than twenty years from volunteers at another heritage railway, especially those who patiently helped me learn about railway operations and driving diesel locomotives. Sadly, some are no longer with us; their introduction of me into the world of heritage railways will be long remembered.

None of this would have been possible without the support of my family to whom I owe a great debt of gratitude. Simon and Daniel watched, supported, and I am certain sometimes puzzled over, their father when I am sure they thought he had reached the stage in life where sitting on a sofa watching TV should be his main activity.
Gillian, you provided unconditional love and support to me through the long years of the process, the good bits and the bad bits. A talented writer and artist yourself, your proof reading, insights and advice as my writing developed was invaluable.

Thank you all.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1 – INTRODUCTION

1.1 Introduction

Nearly everyone is familiar with volunteering but academic consideration of volunteer experience is relatively rare. Many people in the United Kingdom volunteer their time and effort. The National Council for Voluntary Organisations (2021) (NCVO) calculate that 16.3 million people volunteered formally at least once a month in 2020-2021 and if informal volunteering such as caring for family or friends is added the number rises to 29.4 million. Part of that larger number may be attributed to the COVID-19 pandemic resulting in voluntary caring for many of those affected.

Volunteering reaches all parts of society in a variety of ways with different activities, organisations and demands on volunteers; the whole voluntary sector has been described as a “loose and baggy monster” Knapp and Kendall (1995, p.65). As a result, it is perhaps unsurprising that the study of volunteering has been undertaken in a rather disjoined way (Kragt and Holtrop, 2019) with some areas under-researched. The purpose of this thesis is to explore a specific under-researched area – that of volunteers with the responsibility for managing other volunteers (Hill and Stevens, 2011).

This introductory chapter sets out the rationale underpinning the study, how it originated and why it was undertaken in a particular voluntary organisation. It will also provide an overview of the thesis structure.

1.2 The rationale for the research

The voluntary sector is a substantial employer with 925,000 paid employees (NCVO, 2023) and whilst there is no data about the organisational structures of the 163,959 organisations in the sector (NCVO, 2023) many of the larger ones have paid staff including paid managers.

It is also most likely (there is no detailed information) that the larger organisations have paid staff whose job it is to manage volunteers. The literature on managing volunteers is largely focused on the concerns of paid management staff. Unpaid volunteers who manage other volunteers remain under-researched (Hill and Stevens, 2011; Rochester, et al., 2012).

Organisations use volunteer's time and abilities in different ways. Depending upon how the voluntary organisation is structured volunteers may or may not be engaged in the management of the organisation (Hill and Stevens, 2011). Voluntary organisations may be run by paid professional employees who deliver front-line services supported by volunteers. An alternative approach may use the volunteers to deliver the front-line services with the volunteers managed by paid professional staff. A different kind of organisational structure puts volunteers in the driving seat in strategic management positions and those volunteers (usually known as Trustees) set the strategy. They may employ paid staff to help deliver the organisation's activities and in large voluntary organisations this may include employing paid staff to manage the volunteers. One other type of organisation structure sees the organisation operating with only volunteers – no paid staff.

Human resource management (HRM) practices covering all aspects of the employment relationship from recruitment to retirement are seen as the means for paid managers to effectively manage volunteers and enhance volunteer engagement (Alfes, et al., 2017; Traeger and Alfes, 2019).

However, HRM textbooks barely consider (one item in the index of each text cited here) volunteers (Beardwell and Thompson, 2017; Torrington, et al., 2020). Unsurprisingly, matters relating to becoming a manager are considered in a paid employment context with ideas of management training and development similarly framed. Thus, it appears how volunteers might become managers is implicitly assumed to be through the same mechanisms as in the paid employment context. However, understandings of how volunteers become managers and their experiences of management are as has already been noted, under-researched (Ward and Greene, 2018).

Nevertheless, there are some similarities between paid employment and volunteering; particularly regarding individuals holding multiple positions. In the paid employment context research has particularly addressed the medical profession (e.g. physicians who also hold management positions) creating challenges to how they re-construct their identity in those circumstances (Spyridondis, et al., 2015; Martin, et al., 2017). By virtue of having hybrid roles, in which the roles are interlinked, or multiple positions where the roles are separate individuals must manage the boundaries between their different identities (Taylor, 2004; MacLean and Webber, 2015). A difference between the situation of the volunteer managing other volunteers and the paid employee noted by Martin, et al. (2017) is that in the paid employment situation it is the organisation initiating the multiple role holding, whilst the volunteer initiates it through their own choice. This too is an area in which the volunteer situation is under-researched.

To investigate the under-researched areas noted above and looking specifically at volunteers managing other volunteers in a heritage railway this study uses a qualitative approach adopting a social constructionist perspective (Burr, 2015; Gergen, 2015) with the lens of identity and identity work (Brown, 2017; Caza, et al., 2018) providing the focus. It employs ethnographic methods which include semi-structured interviews and observation. Forty-eight volunteers managing other volunteers were interviewed, four in a pilot study at a different heritage railway and forty-four at the main research railway. The narratives were analysed using thematic analysis (Braun and Clarke, 2006) and dialogic narrative analysis (Frank, 2010) to address the research question:

"How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?

1. In what ways are routes to volunteering navigated?

2. What are volunteers experiences of becoming a manager?

3. How do volunteers engage with multiple position holding?"

1.3 The genesis of the thesis

This research originated from a very practical issue quite unrelated to academia. As the Chair of a volunteer-led and run heritage steam railway (not the one that is the subject of this thesis) one challenge I faced was finding volunteers who were willing to take on the task of managing other volunteers. A UK charitable organisation must meet the requirements of the Charity Commission (Charities Act, 2011) and if it has a trading arm the obligations of the Companies Act (2006). A heritage steam railway additionally must comply with relevant railway legislation (Office of Rail and Road, 2022). This means having suitable governance and governance necessitates management. The position of a volunteer manager of other volunteers therefore carries not inconsiderable responsibilities.

When vacancies for managers occurred at that railway an advertisement was put in the railways in-house magazine usually failing to attract responses. It was, therefore, necessary to try and attract a candidate for the position by talking to known likely individuals in an attempt to persuade them to offer their services. All manner of responses were received by me, mostly making the point that they liked doing the practical task in which they engaged and did not wish to do anything else. For a finance position, for example, those who were well-qualified told me that they did not want to carry their paid employment into their volunteering. Others shied away from the responsibilities that managing would entail. Eventually, someone would be found and the position filled, although in the interim, which could be quite a long period, other managers filled multiple positions to ensure managing was undertaken. Occasionally, an individual who was seen as totally unsuitable would offer themself for the position and the challenge was then to persuade them they did not want the position but to carry on with their volunteering.

One day in a non-railway environment I was bewailing these challenges to a colleague and the comment “You know, there’s a PhD in that” was made. After a period of gestation, I concluded there was indeed an opportunity and the rest is in this thesis. As the thesis gathered steam (sorry!) it became impracticable to continue with the volunteer Chair position as well as doing other part-time work and I chose resign from the Chair's position to become a volunteer at a completely different railway – the one that became the source of participants for this study. My part-time work entailed being an independent consultant as well as part-time university lecturer, both in human resource management. There is something of 'gamekeeper turned poacher' about the situation! Issues faced in undertaking the study included a need to learn to become a researcher and realising it was necessary to challenge some of my long-held assumptions held about human resource management process and practice.

Having been a practitioner in human resource management and having experience of being the person 'with whom the buck stops' in a heritage steam railway I was responsive to the idea of contributing to academic knowledge and, maybe, to practice. The literature on heritage railways, as opposed to popular journalism, is limited. Most of the literature relating to heritage railways I found during my research did not make it into this thesis because it did not satisfy academic peer-reviewed criteria. My research aims to add to the literature of volunteering in heritage railways.

Before ending this section, mention has been made of the safety-critical environment in heritage railways and more will be said of this in Chapter 4. The heritage steam railway environment in one where there are risks to the volunteers running the railway and to visitors. Steam locomotives have coal-fired boilers working at high pressure, trains can weigh up to 200 tonnes or more and visitors must be carefully controlled.

However, the safety-criticality referred to is operationally related; whilst preparing this chapter an article entitled “Heritage railway volunteers ‘threatened to knee-cap bosses’” appeared in the press (Times, 2023). This thesis will not be addressing this particular management challenge!

1.4 The heritage railway industry

The heritage railway industry emerged from the Beeching closures on British Railways in the 1960’s (British Railways Board, 1963). Groups of individuals sought to retain in private ownership steam locomotives, carriages, wagons and railway routes being closed, although the earliest preserved railway was the Ffestiniog Railway in Wales a railway previously privately run by the owners of a slate quarry.

Financing was the key concern for preservationists who sought to acquire unwanted British Railways assets before they were sold for scrap or before stations and track were sold for re-development. There are now nearly two hundred preserved railways and railway museums (Heritage Railway Association, 2022). However, finding the finance to maintain heritage railways able to give passengers trips on heritage trains remains a challenge.

Heritage railways can be considered part of the broader heritage tourist industry and are estimated to have contributed a Gross Added Value of £14.7 billion to the UK’s GDP in 2019 (Centre for Economics and Business Research, 2020). Therein is the background to a dilemma within groups of volunteers in the heritage railway sector – the balance to be had between concentration only on preservation and acting commercially as part of the heritage tourism sector to attract visitors and thus funds. Country Railway (the pseudonym given to the railway in this thesis) was, like many UK railways, built in Victorian times, closed in the last century in a time of great change in the railway sector and acquired by preservationists. Led by volunteers it has some paid staff and runs steam train services throughout most of the year.

1.5 The structure of the thesis

A summary of each chapter is given below to provide an overview of the thesis.

<u>Chapter 2 Volunteers and volunteer management</u>

This chapter reviews literature relating to the nature of volunteering, volunteers and the management of volunteers by both paid staff and unpaid volunteers. The focus is on volunteering in the United Kingdom, given this is the specific context for the research. This literature is wide and diffuse and I focus on literature that offers insights into my research question. The complexity of the voluntary sector is identified in the way it is structured and managed. Volunteering is explored including regard to the time an individual is prepared to devote, how seriously volunteering is taken by volunteers and of volunteering in risky and safety-critical environments. Understandings of how volunteers become managers are little explored and this study throws some light upon the complex nature of the process.

<u>Chapter 3 Identity</u>

This chapter reviews the concept of identity, looking specifically at the identity of the individual in the context of management and organisational studies. The focus will be on identity as it is created and re-created within an organisation. The chapter will consider the antecedents of identity research, social identity theory, and then move into the organisational context and explore identity in organisations and key themes in the literature. Identity work looking at how an individual may construct their identity will be reviewed as will issues related to individuals holding multiple identities. Whether being in different locations may affect the individuals' re-construction of identity will be addressed as will socio-materiality. The chapter will end by considering liminality as transition to a new position is not always an easy process and the transition may take a longer period of time than might have been anticipated. Volunteers create identities that relate to the circumstances in which they find themselves, and many factors make re-creation of identity complex which the volunteers mostly have to resolve individually. The chapter concludes by drawing together the literature from volunteering, identity, and management, and draws a road map through the thesis.

Chapter 4 The organisation and its context

This chapter will set the organization into its context within the Heritage Railway sector. The railway's history will be given briefly as will its current scale and scope of operation. The three locations studied in this thesis will be explained in more detail to show what each does, how it carries out its responsibilities and what the volunteers at each location undertake. How volunteers do their work will be explained together with aspects of the volunteer management process such as rostering. To support this chapter there is a Glossary to de-mystify some railway industry terms and jargon included at Appendix 4. The nature volunteering is highly dependent on context with technical aspects of the railway overlaid with its social nature.

Chapter 5 Methodology

This chapter discusses the methodology used for this empirical study of volunteers and how they re-construct their identity as they engage with responsibilities for the management of other volunteers. The methodology chosen is qualitative and ethnographic, it is also underpinned by a subjectivist, interpretivist and constructionist position. The data collected was analysed using thematic analysis and dialogical narrative analysis. This methodology was considered to be appropriate for the voluntary organisation and provide the participants with reassurance about the process.

Chapter 6 Results: The view from the locomotive footplate

This chapter presents an overview of work on the footplate and its management. The chapter begins with an exploration of how these participants began their volunteering with Country Railway. Those working on the footplate follow a hierarchically structured competency-based training programme taking several years to complete. The footplate crew first start to engage in management activities as a result of progression through the footplate hierarchy and the working of this is discussed. The chapter also explores how those who do hold management positions become involved in multiple activities. Footplate crew can choose to hold additional positions, perhaps within the Operating Department as an Inspector (assessor of the competence of other footplate crew) or elsewhere on the railway for example as a Signaller. The footplate is a unique environment with the crew working a machine built of legacy technology with participant narratives taking differing perspective on the machine and its operation.

Chapter 7 Results - At the Station: "All aboard!"

This chapter explores the stories of those volunteers who work on the platforms of the two stations that were studied. This chapter follows the same analytical framework as the previous chapter presenting an overview of the stations and platform work. It then reviews narratives of becoming a volunteer and how participants first became a manager of other volunteers. It will consider those volunteer managers who undertake additional positions in Country Railway. Whilst the railway has standard operating procedures for its stations individual narratives may vary.

Chapter 8 Results - A look into the Workshops.

This chapter considers those participant volunteers who are based in workshops. The categorisation of a participant being considered 'based in the workshops' is derived from the place where much of their work is carried out. Following the same framework as the previous two chapters this chapter presents an overview, considers how volunteers started with Country Railway and how they became managers for the first time. How those in management positions came to be in multiple positions is reviewed. The workshops are charged with maintaining and repairing equipment which is 60 or more years old and keeping it running safely, especially when those who did such work for their paid employment are now in very short supply.

Chapter 9 Discussion and conclusions

The final chapter draws together the analysis from the preceding results chapters and considers the three themes of how individuals joined Country Railway, how they became managers and the holding of multiple positions across the locations studied. Individual narratives are explored and the variety of means by which participants became managers examined. The empirical and theoretical contributions of this study are set out. These build on my findings in relation to the complexity of volunteer entry into the organisation, of different experiences narrated of progression to a volunteer managerial position and that tensions around boundaries are significant in the identity work of volunteers holding multiple positions. The chapter concludes with consideration of implications for practice, the limitations of the research, suggestions for further research and a personal reflection on the process of writing this thesis.

1.6 Conclusions

This introductory chapter has explored the background to volunteering in the UK and how the management of volunteers might be organised. It has noted that the management of volunteers by unpaid volunteer managers is a little explored area despite calls for more research. This study observes that in Country Railway many volunteers are managed by other unpaid managers of volunteers. How those individuals who take on responsibilities for the management of other volunteer's re-construct their identity is explored, as research in the management and organisational areas has primarily focused on people in paid work environments. How a volunteer becomes a manager occurs in a variety of different ways with from, time to time, varying degrees of success. In the research it was not uncommon to find that volunteer managers of volunteers also held other positions within Country Railway giving rise to identity issues of boundary management and liminality. This research aims to address some of these under-researched issues. An overview of the structure of the thesis has been provided summarising the chapters that follow this introduction.

CHAPTER 2: VOLUNTEERS AND VOLUNTEER MANAGEMENT

In this chapter I review literature relating to the nature of volunteering, volunteers and the management of volunteers by both paid staff and unpaid volunteers. My focus is on volunteering in the United Kingdom, given this is the specific context for my research. This literature is wide and diffuse and I therefore focus on literature that offers insights into my research question: “How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?”

2.1 Introduction

In this introductory section I set out the background to the voluntary sector in the United Kingdom (UK) as context for the review that follows. The sector can be viewed by how it makes its contribution for the good of society as a whole (Morris, 2000). As many voluntary organisations are also charities, this context includes defining key terms that are relevant to my research.

2.1.1 Background to the voluntary sector in the United Kingdom

I begin by exploring key meanings and terms used within the UK voluntary sector. A key definition within the sector puts volunteering as the means “to create social impact rather than profit, often called the third sector, civil society or the not-for-profit sector” (Reach Volunteering, 2022: n.p.). The scale and scope of voluntary activity in the United Kingdom is considerable. The National Council for Voluntary Organisations (2021) (hereafter NCVO) estimates that 16.3 million people volunteered formally for an organisation at least once a month, and 29.4 million people volunteered informally during 2020 – 2021. The range of activities undertaken by voluntary organizations has expanded greatly over time and now encompasses culture and recreation, education, playgroups, social services, rescue services, transport related activities, environment, and housing (NCVO 2021). Some voluntary organisations operate in environments that are constrained by statutory regulation because of the risks to volunteers or their customers/clients, for example, hospices (Morris, et al., 2015), heritage railways (Office of Rail and Road, 2022). There were 163,150 voluntary organisations in 2018 to 2019 having an annual income of £56 billion (NCVO, 2021). Voluntary organizations vary significantly in scale, and NCVO (2021) data indicates that of 163,150 voluntary organizations, 156,645 have incomes of less than £1 million per year, of which 72,520 have incomes of less than £10,000 per year. At the other end of the scale 6,505 exceed £1 million per year income, including 59 organizations each having an annual income in excess of £100 million.

Given the size, reach and scale of volunteering in the UK, it is unsurprising that the voluntary sector itself is complex. It undertakes a multiplicity of activities, engaging with volunteers of varied skills and voluntary organisations are to be found across the UK.

2.1.2 Introducing the literature

Attempts to understand volunteering are challenging as the voluntary sector is complex, multi-faceted, and has a "rich variety of forms it can take" (Rochester, 2012, p.9). Particularly compared to paid employment it remains relatively unresearched (Kelemen, et al., 2017; Dawson et al., 2019; Haski-Leventhal, et al., 2019), and fragmented (Kragt and Holtrop, 2019), although "burgeoning" in some areas (Dawson, et al., 2019). In particular, specific aspects of volunteering such as volunteers who manage other volunteers, the focus of this thesis, are "largely excluded from the analysis" (Hill and Stevens, 2011, p.107).

Academic research on volunteering is then as disparate as the voluntary sector itself. As introduced above, the voluntary sector is large but also complex as it is diffuse in its range of activities and scale, and comprising “large and complex organizations as well as small community-based groups” Rochester (2012, p.14). The scale of the financial resources individual organizations are able to deploy impacts upon the number of volunteers involved and the approaches to managing those volunteers. As in other areas of organisational studies, much research focuses on the larger players in the sectors and Milbourne (2013) points out that some 75% of small or micro-organisations evade the researcher’s gaze. Reflecting on this complexity then the literature of voluntary action and volunteering is similarly complicated and not easy to divide into neat categories. As Pearce (1993, p.9) observed “...organizational volunteering is *inherently* contradictory in nature” (italics in original).

The next section will review the literature looking at the complex structure of the organisations in the voluntary sector at large.

2.2 The voluntary sector

This section explores the notion of volunteering by looking at literature that has attempted to set out the nature of the field within in which volunteers give their voluntary efforts. This will cover the organisations and the ways in which they are structured.

2.2.1 The organisations within the voluntary sector

There is a range of definitions used by researchers, practitioners and the general population to describe elements of the sector, and a lack of consistency in usage. With such lack of consistency Rochester et al. (2012. p.9) note the "concept most people have of voluntary action is incomplete", with some matters explored and explained whilst others remain under-researched, creating a field in which as Kragt and Holtrop (2019,p.343) point out is "largely fragmented". Those coming to volunteering may have different perspectives. Historic definitions of volunteering related mostly to religious houses and the military (Karl 1984).

In their cross-national analysis of the not-for-profit sector Salamon and Anheier (1997) point out that this lack of clarity results in what they describe a distinction being overlooked. For example, they say that philanthropy and the private non-profit sector are often treated as exchangeable (Salamon and Anheier, 1997). They offer a definitional contrast between the difference of the non-profit sector providing a range of services, whilst philanthropy includes the charitable giving of financial support to non-profit organizations, as well as giving money and property for public purposes. Contemporary legislation in the UK now acts to define the notion of charitable. To obtain Charitable status an organisation must operate for the benefit of the public, ensure any personal benefit is incidental and, if the requirements of the Charity Commission are met the organisation should be able to receive tax relief (NCVO 2022). Therefore, a voluntary organisation need not necessarily be a charity. Nevertheless, in lay terms charity, philanthropy and the non-profit may be seen to be interchangeable (Nordberg, 2019). Certainly, there is a rich legacy of understanding that shapes public understanding and could be said to influence academic writing. Rochester (2013, p.18) is forthright on this writing: "Much – too much – of the history of voluntary action has been written as the history of philanthropy."

Another ambiguity is “the degree of organizational formality required of the entities” (Salamon and Anheier, 1997, p.14). Whilst looking at small voluntary organisation Nunan (2010) explored issues of governance which in the United Kingdom include aspects such as whether the organisation is registered with Companies House, falling under the guidance of the Companies Act (2006), thereby being described as a formal organisation. There may also be other statutory regulations impacting upon their activities such as the regulation of heritage railways by the Office of Rail and Road (Office of Rail and Road, 2022). In their study of nonprofit organisations and intangible assets, (and note the use of another term to describe the voluntary sector), Buonomo et al. (2020) consider that the relative lack of literature in that area is due to “the general tendency to consider NPO’s [non-profit organisations] as informal organizations” (p.7). So, just as there is less attention in organisation studies to volunteering in comparison to paid employment; there is also historically less attention to informal in comparison with formal organisations. In their review of volunteering research Kragt and Holtrop (2019) observe the field is still fragmented and lacking methodological rigour.

Overall, then, Knapp and Kendall (1995:65) suggested that the voluntary sector was a “loose and baggy monster”. Perhaps it is not surprising that there are attempts to develop definitions within the sector itself. The NCVO (2021) set out six criteria to define the UK voluntary sector: the organization has a formal structure and set of rules, it is independent, non-profit distributing, has self-governance, has voluntarism, and is for the public benefit. Where I use ‘voluntary sector’ across my thesis draws on this NCVO (2021) definition.

While these criteria are useful for defining the boundaries around the sector, they are less useful in offering a means of analysing activity within the sector itself. Moreover, Wilson (2000) suggests that attempts to disaggregate the voluntary sector by the creation of taxonomies is unhelpful as some taxonomies are “folk categories (e.g., school-related, helping the elderly)” (p.233), with little reason to believe that such categories are useful. Noting in the voluntary sector different outlooks abound Alcock (2010) refers to the definition of the field as still being contested. Thus, we lack relatively simple taxonomies that might help with analysing the literature, leaving a variety of broad categorisations that scholars adopt to suit particular purposes.

Having considered the sector the next sub-section looks at the structures of organisations within the sector.

2.2.2 The structures of voluntary organisations

I now explore the ways in which voluntary organisations are structured. Whilst the sector overall is described as voluntary many organisations, in addition to having volunteers, employ paid staff, adding further a layer of complication. In seeking to understand and analyse the sector some researchers have considered the varying ways in which voluntary organizations are structured, led and managed. In their study into what they term the under-researched area of volunteer involvement in management, Hill and Stevens (2011) provide a framework categorising types of organisations according to the roles undertaken by paid versus volunteering individuals.

Table 2.1 Types of organization, leadership and management. (Adapted from Hill and Stevens, 2011:110).

Type of organization	Leadership	Volunteer Management
Volunteer-led and run	Primarily volunteer-led	Volunteers organize themselves
Staff-supported	Primarily volunteer-led	Volunteers organize with paid staff supporting day-to-day volunteer management activities.
Volunteer-supported	Primarily paid staff-led	Strategic responsibility with paid staff, volunteers involved in some management.
Volunteer-involving	Primarily paid staff-led	Staff lead strategy and management, volunteers involved in delivery.

Typologies around leadership and management have been the subject of research with different formulations proposed (Alcock, 2010; Rochester, et al., 2012). This adds to understanding of how leadership and management might be construed in the volunteer context, but the variety of typologies and formulations add complexity to understanding the sector. The drive for seemingly compartmentalised research led Toraldo, et al., 2016) to observe that volunteering is multi-dimensional. This is not a new problem, Handy (1988, p.10) writing on voluntary organizations noted: "... the scene is confusing to an outsider when such a wide variety consorts under the same umbrella name."

Whilst there is much research around volunteers and volunteerism (Grant-Smith and McDonald, 2018; Wilson, 2012; Kragt and Holtrop, 2019), there remains the need for further research into unexplored areas around how the type of organisation may itself have influence upon volunteer identity.

This section reviewed literature addressing the complexity of the voluntary sector itself. The next section will look at how the literature deals with those working within the sector especially the volunteers.

2.3 Volunteers and their volunteering

. This section is in two parts: the volunteers themselves and the volunteering activities they undertake.

2.3.1 Volunteers

The difficulty in defining voluntary activity is compounded by its fragmentation and so it is perhaps not surprising that the definition of a volunteer is also contested. Cnaan et al. (1996, p.365) suggested: "not all people who perform voluntary activities can be defined as volunteers" and offered four dimensions defining volunteering: the voluntary nature of the act, the absence of reward, it is conducted in an organized setting, and the beneficiaries are strangers. These dimensions are challenged by Wilson (2000) who suggested that volunteers could benefit from their work, albeit in a slightly ambiguous way in that whether or not the benefits "could include material rewards is open to debate", (pp.215-216). Reflecting a common overarching scope, and echoing Cnaan, Zappala (2000, p.1) suggests volunteering is: "an activity that is freely chosen, does not involve remuneration, and helps or benefits strangers" Snyder and Omoto (2008, p.3) summarise volunteering as an activity that is "freely chosen and deliberate helping activities that extend over time, are engaged in without expectation of reward or other compensation and often through formal organizations, and that are performed on behalf of causes or individuals who desire assistance." A further proposal made by Rochester et al. (2012) suggests that volunteering “is a two-way process” (p.18) from which the volunteer also derives benefits although that excludes material benefits. The idea of who is a volunteer is not static and is liable to temporal and contextual change.

Despite these perspectives key issues remain at the heart of the contested definitions of who is a volunteer and what constitutes volunteering. The unpacking of ideas on volunteering has been piecemeal, but recent literature continues to draw on the Cnaan, et al. (1996) four dimensions - the voluntary nature of the act, the absence of financial reward, undertaken in an organised setting, and done for strangers (Dury, et al., 2015; Toraldo, et al., 2016). However, this acceptance perhaps reflects that definitions need to be broad in order to encompass the vast range of activity undertaken in the voluntary sector. Yet as a result there is a risk that this breadth means the definitions themselves offer very little insight in the nature and practice of different volunteering types or activities.

However recently, arguing that the nature of volunteering is changing and there is increasing diversity between volunteers, Brudney, et al. (2019:6S) propose alternative means of categorising volunteers by of time given, the way volunteering is conducted, the object of the volunteering, and the environment in which volunteering is undertaken. These proposals for the extension of definitions of volunteering do not seem to necessarily change the idea of who is a volunteer (Cnaan, et al., 1996), as the extensions seem to relate to context, e.g. on-line, related to animals, and time devoted to volunteering for example – the volunteer themself can still be framed within the factors identified by Cnaan, et al. (1996).

Concern with the what, how, where and why aspects of volunteering has also has produced new insights, for example the notion of "thick" volunteering (O'Toole, 2013; O'Toole and Grey, 2016a). Thick volunteering as proposed by O'Toole (2013), within the context of the Royal National Lifeboat Institution, adds understanding to notions of volunteer commitment in that impact upon the volunteers' identity has "sufficient substance and meaning as to make it possible for those undertaking it to gain a significant sense of identity from it" (O'Toole 2013, p.34). This concept is further broadened by the notion that the volunteering can occur within a web of social relationships (O'Toole and Grey 2016a) such that the volunteer may have some pre-disposition to volunteer for the organisation. The notion of gaining a significant sense of identity from volunteering, can also be found in the work of Stebbins (1996, p.216) who suggests "serious leisure volunteering as *career* volunteering", (italics in original) which may also have a significant effect on identity. There is more discussion on the work of Stebbins and serious leisure in section 2.3.5. The concepts of thick volunteering and serious leisure are relevant to the context of my research given the timescales required to achieve competence in particular tasks.

In studying volunteering in sports organisations Nichols, et al. (2019) considered how different approaches towards promoting volunteering to new volunteers might be positioned as self-interest, alongside a developmental model. This inclusion of self-interest re-positions volunteering from the more altruistic perspective adopted by Cnaan, et al. (1996), adding yet another approach.

Moreover, looking at the promotion of volunteer recruitment and engagement in sport Nichols, et al. (2019) suggested two approaches might be adopted. One, that in current times a more self-interested and a consumer-based focus be shown towards potential volunteers. The other approach reflects the idea that for an individual volunteer "values and identity remain fairly constant over the life-course, while individuals' circumstances and opportunities change" (Nicols, et al., 2019, p.8), so positing a life of volunteering which changes and adapts over time and the means of attracting volunteers should reflect this. These approaches are addressed to potential volunteers the organisation seeks to attract. It reflects the benefits of being a volunteer and how one might develop as a volunteer with differing approaches to becoming a volunteer. The focus is on the need for the organisation to attract volunteers, rather than volunteers seeking an organisation in which to volunteer.

This section has addressed continuing attempts to define what volunteering is and some issues related to being a volunteer, including whether becoming a volunteer was from individual choice or in response to an organisation promoting its need for need for volunteers. The following sub-section will consider literature looking at the reasons behind volunteering.

2.3.2. Reasons for volunteering

The reasons why volunteers undertake their volunteering activities and the likelihood of continuing to volunteer has been the subject of much research. Understanding reasons for volunteering may assist voluntary organisations when they need to undertake the recruitment of volunteers, and for scholars to gain further understanding of what brings individuals into volunteering and what holds them there, or what might be factors in quitting.

Table 2.2 below summarises some of the reasons in the literature for volunteering.

Table 2.2 Summary reasons for volunteering

Reasons for volunteering identified	Source	Method	Type of volunteering
Overlapping motives	Cnaan and Goldberg-Glenn (1991),	Quantitative using questionnaire derived from literature.	Human service agencies, e.g. nursing homes.
	Vantilborgh, et al. (2013)	Quantitative, psychological contract focus, Psychological Contract Inventory	Health sector, Education sector,
Volunteers' own agenda	Clary, et al. (1998)	Quantitative, developed Volunteer Function Inventory from literature.	Social services, e.g. children, cancer patients.
Needs of the psychological contract	Farmer and Fedor (1999),	Quantitative, focus on psychological contract. Questionnaire developed from interview sample.	National healthcare advocacy.
	Griep, et al. (2016)	Qualitative, diary study.	Social enterprise

			distributing fair trade goods.
	Vantilborgh, et al. (2011)	Theoretical, psychological contract focus, hypothetical cases addressed.	
	Vantilborgh, et al. (2014)	Quantitative, psychological contract focus, Psychological Contract Inventory with amendments.	450 Non-profit organisations – unspecified.
	Kappelides, et al. (2019)	Qualitative, psychological contract focus, interview questions developed from literature plus sampling.	12 Camping organisations
	Vantilborgh and Van Puyvelde (2018).	Theoretical, psychological contract focus	
Performance demands made by the organisation	Farmer and Fedor (2001)	Quantitative, questionnaire developed from interview sample.	National Healthcare Advocacy – executives.
	Prinicipi, et al. (2012)	Case studies, organisations perceptions of older volunteers.	74 pan-European case studies, e.g. social services, healthcare, education.
	Harp, et al. (2017)	Quantitative, questionnaire, adapted existing document	Animal welfare, homeless shelter.
Pro-social motivation	Aydinli, et al. (2016),	Quantitative, a selection of available questionnaires.	Volunteers – unknown organisations
	Dury, et al. (2015)	Quantitative, questionnaire.	Volunteers drawn from a

		Older volunteers	national Ageing study.

Table 2.2 above illustrates some research exploring the approaches to volunteers' reasons for volunteering. Within the quantitative methodologies researchers are often seeking to uncover predictive issues to understand reasons for becoming and remaining a volunteer – potentially of some use to volunteer-using organisations.

In considering these studies a number of issues arise. Utilising a questionnaire approach permits participants to respond only to the questions posed by the researchers, with researchers often relying on pre-existing questionnaire tools that were designed for a prior different study. Whilst adaptations can be made to some pre-existing questionnaires the sources available to researchers are extant literature.
A number of studies have sampled people describing themselves as volunteers from unstated, or unknown, organisations. Where the type of organisation is known within the sampled literature there is a preponderance of organisations that can be broadly described as social service organisations, leaving many other types of voluntary organisation unexplored. What this creates is a gap in the deeper understanding of why individuals choose to volunteer for a particular organisation. This is relevant as my research endeavours adopts a qualitative and ethnological approach eliciting in-depth narratives from individual volunteers in, albeit, a particular organisation.

Taking issues from the research cited above, some research looking at volunteer age has found that the older volunteer is less likely to quit, Vantilborgh, et al. (2013). Whilst this is not explored further, it is suggested by Hong, et al. (2015) that organisations utilising volunteers might need to adapt activities to meet the preferences of older volunteers. Prinicipi, et al. (2012) propose that voluntary organisations see older volunteers in much the same way as other organisations view them, with less positive views on productivity and adaptability. This approach might miss the point that productivity, as viewed in the more common commercial organisations, is rarely mentioned as a volunteer criterion, although the amount of time a volunteer is prepared to devote to their volunteering has been investigated (Farmer and Fedor 2001). Dury, et al. (2015) claim that individuals in younger age groups having fewer social resources to draw on, were unlikely to volunteer, and older people with greater social resources were more likely to volunteer. However, this use of age as a causal factor might overlook other determinants of volunteering. The problem of aggregation loses the depth of understanding that a qualitative approach can bring to bear. Some of the studies cited utilised quantitative approaches to establish their data, which does not provide granularity to volunteer motives.

As noted in Table 2.2 the psychological contract (PC) has attracted the attention as a way of understanding voluntary activity (Rousseau 1989, 1995, 2001; Robinson and Rousseau 1994; Robinson and Morrison 2000; Conway and Briner 2005). The notion of the psychological contract is about beliefs held by the individual about the organisation with whom the individual is engaged. The PC is unwritten - it is about the beliefs of both parties (employee and employer) of mutual obligations formed from their own understandings of the employment relationship, (Herriot, et al., 1997). Rousseau (1995, p.9) suggests "Psychological contracts have the power of self-fulfilling prophesies." Research around the concept of the PC in volunteering has been lifted from the context of paid employment, and applied to research in the voluntary sector with little or no reconceptualization (Vantilborgh, 2011, 2014; Nicols, 2012). Moreover studies of the PC are wide and vary in focus, meaning that it is difficult to draw generalisations. Griep, et al. (2016) explored the likelihood of breach of the psychological contract and counterproductive work behaviour; Vantilborgh, et al. (2011) looked at the impact of the changing nature of non-profit organizations and volunteer style on the psychological contract of volunteers; Vantilborgh, et al. (2014) dealt with impacts upon volunteers' ideological psychological contract and work effort. While these are mainly quantitative and thus lacking granularity, some qualitative studies have looked at ways of better understanding the psychological contract can help improve outcomes at the time of volunteer recruitment where expectations may be set (Kappelides, et al. 2019).

Mindful of the issue of simply transferring the PC across from a paid employment context, Nichols (2013) proposed new research questions that might be posed about the psychological contract of volunteers based on the volunteers' own perceptions of their volunteering. Approaches to studies are wide and vary in focus, broadening the scope for greater understanding requires consideration of differing volunteering contexts.

A common characteristic of these studies is that they, in one way or another, offer advice for practitioners about how to improve volunteer performance, sometimes from a human resource management perspective. This element of problem solving and prediction seeking generalisability moves further away from understanding the individual nature of many of the motivations and concerns of volunteers. The next sub-section addresses literature considering how in general volunteers make contributions to their organisations.

2.3.3 Volunteer contributions

Volunteers undertake a wide variety of activities in a range of organisations. The literature has considered how an individual's involvement might vary, and has sought to define and classify modes of participation (Pearce 1993; Cnaan, et al., 1996; Holmes and Slater, 2012; Ho and O'Donohoe, 2014). This is an area in which a multiplicity of definitions and categorisations have been explored with researchers identifying differing and sometimes overlapping characteristics. Table 2.3 below summarises categories from key authors who have considered the overall ways in which volunteers contribute.

Table 2.3 Volunteer characteristics summarised

Category of volunteer	Characteristics	Source
Core Peripheral Occasional	Interested in the organisation Organisation not a significant interest Occasional contributor	Pearce (1993)
Long – term Short-term	More dedicated to organisation Less dedicated	McCurley and Lynch (1989)
Long-term Short-term Temporary episodic Interim Occasional episodic	Gives more time Gives less time Short periods of time on a one-off basis Regular but short timescales Occasional short periods of time	Rochester, et al. (2012)
Core	Committed	Holmes and Slater (2012)

Peripheral Substituter Payer and player	Meeting social needs Insufficient time – gives financial support Seek the benefits of belonging, e.g., discounts	

In classifying volunteers into 'core' or 'peripheral' Pearce (1993) suggested core volunteers "took an interest in the organization" (p.48) and might also be holding a formal position within it. For peripheral volunteers the organisation "was not a life interest" (Pearce, 1993:48), they were less involved, gave less time and were less well-informed than were core volunteers, although Pearce (1993) noted the boundary between core and peripheral was fluid as, for example, a peripheral volunteer might decide to join the core. Also identified by Pearce (1993) were volunteers who were only occasional contributors, and some potential volunteers who were trying out the organisation to see if they wished to commit. Volunteers were categorised as either long-term or short-term by McCurley and Lynch (1989) with long-term volunteers being more dedicated to the cause or organisation. Rochester, et al. (2012) observed that where volunteers became involved with an organisation for differing reasons and time periods they created variations in what they offered. Across these categorisations it becomes possible to consider how different responsibilities might be conceptualised, but these frameworks stop short of explicitly identifying management type roles for volunteers. I return later to consider this in section 2.4.

Other scholars have suggested that the level of engagement can be specified on a spectrum of active to passive. In their study of UK heritage organisations Holmes and Slater (2012, p.851) suggested different forms of active engagement from "committee membership or volunteering", through to "passive involvement, whereby the member pays their fees but remains a silent member". This led to further classifying 'core volunteers' who are key volunteers and may take on a range of roles; 'peripheral volunteers' who are less committed; 'payers and players' who join for the benefits afforded and make use of them, and 'substituters' who trade off giving volunteer time for giving cash to the organisation (Holmes and Slater, 2012). Across this research, the amount of time and the way it is given have been seen as important means to classify volunteers, overlaid with the suggestion that more time dedicated means more commitment.

The theme of volunteers who are key to the organisation is addressed by Einholf and Yung (2018:790) who define a "super-volunteer as someone who volunteers 10 or more hours per week and who contributes a qualitatively higher type of service". The need for such key volunteers still leaves unresolved issues of the volunteer/organisation fit, and Englert, et al. (2020) noted that in the volunteer context "the person/environment fit is scarcely analyzed" (p.336), and propose a volunteer fit model based on service-related (the organisation) and daily-life related (the individual) themes. The person/environment fit includes environmental themes such as organisational values and practices, supervisor behaviour, service quality and, for the individual, values and beliefs, knowledge and personal freedom. In creating the themes Englert, et al. (2020) note that there are relationships within and across themes that will depend upon the individual organisation. The nature of the core volunteer remains open to review and dependent upon the organisation and its environment, (Pearce, 1993; Holmes and Slater, 2012; Einholf and Yung, 2018; Englert, et al., 2020). Whilst research has addressed some issues relating to the person/environment fit across volunteer activities much of the research continues to rely on practices from paid employment applied to volunteering. There is an opportunity for greater understanding in the consideration of alternative approaches and process within a wider range of voluntary organisations.

This sub-section has reviewed how the literature has addressed volunteer contribution. The next sub-section will consider volunteering in particular environments – those that have inherent risk.

2.3.4 Volunteering in risky environments

My research considers volunteers working in a particular safety-critical environment with its associated risk. In this section, therefore, I focus on the literature that has addressed volunteers operating in dangerous, risky and regulated environments. Some environments are particularly dangerous, for example O'Toole (2013) describes volunteer lifeboat crew as operating in a perilous environment. Others environments can involve degrees of risk to the volunteer with technical and legal regulation that requires volunteers given training to be competent in the activities they undertake. This remains a relatively small area of research and includes studies of permanent disaster volunteers (Britton 1991), volunteer firefighters (Lois 1999), volunteer ambulance officers (2003), fire and rescue volunteers (Baxter-Tompkins 2011), lifeboat volunteers (O'Toole 2013; O'Toole and Calvard 2020), mountain rescue volunteers (Nicols et al. 2014) and search and rescue volunteers (Collie and Greene 2023). This area has complexities and further research would add to understanding.

In an exploratory study of Australian permanent disaster volunteers (volunteers trained to assist the emergency services) Britton (1991) found that an issue was tension in the relationship with the paid managers, and this created stress for the volunteers. Researching those they described as high stakes volunteers - those volunteering as firefighters, and providers of medical assistance for example, McNamee and Peterson (2016) developed a typology based around social network ties and individual motives. In one finding they established sometimes high stakes volunteers had underestimated the intensity of the activities in which they would be engaged (McNamee and Peterson, 2016). The high stakes volunteers within the McNamee and Peterson (2016) study were from organisations primarily concerned with the "provision of medical/social/ psychological assistance to clients" (p.277) including firefighters who invested considerable amounts of time in their volunteering often requiring considerable training. McNamee and Petersen (2016, p.288) encourage scholars and practitioners to "consider the diversity of perspective/expectations individuals carry into high stakes volunteering". These are likely to vary according to the organisation and its purpose, and to the individual's initial perceptions of the nature of the volunteering. Individuals who volunteer in high stakes environments carrying significant risk require induction and training for the situations they are likely to face to assist closing any gap between initial perceptions and the reality.

There has been research which has taken an in-depth perspective to explore forms of challenging volunteering. Here the research has orientated towards a focus on volunteer identity - which will be explored further in the next chapter. For example, O'Toole and Grey (2016) used the term 'thick' volunteering, to denote the significant identity work of lifeboat volunteers. They offer this as “a form of volunteering which has sufficient significance and meaning to make it possible for those undertaking it to gain a sense of identity from it” (O’Toole and Grey 2016, p.90). This deep commitment is a part of identity, and the values of the individual and organisation form part of identity construction (Alvesson, et al., 2008; Hitlin, 2003; Ybema, 2020). That volunteers develop identities relating to their activities is an under-researched area with most studies looking at identity work in the paid employment context. The notion of specific identity work as an output from ‘thick’ volunteering is a valuable contribution, and the theme of volunteer identity is one that is of interest to this research and so will be addressed further in the following chapter.

The ideas of ‘thick’ volunteering (O’Toole and Grey, 2016) and serious volunteering (Stebbins 2009) are pertinent in the safety-critical context of this research where there is a mixture of risk, reliance on the actions of others and concepts of place. Using ideas from O’Toole and Grey (2016), researchers have discussed supportive social relationships in dangerous circumstances (Sanghera, 2018); setting volunteering into contexts where social relationship, emotional and physical challenges occur (Kewes and Munsch, 2019), thick volunteering as a badge of honour (Weller, et al., 2020) and volunteering in relation to place (Daly and Allen, 2021). The association of social relationships within risky volunteering provides further depth of as understandings of volunteer risk are developed, in addition to the often-expressed perspective that people volunteer for the opportunity to be sociable and make new friends.

This sub-section has considered literature where risk is involved in volunteering to both the volunteer and others, and of the need for the training of volunteers. My research in a safety-critical environment is considered further in Chapter 4, and in the Results chapters 6,7, and 8. The next sub-section looks at the concept of serious leisure.

2.3.5 Volunteers and serious leisure

Volunteers sometimes demonstrate serious commitment to the activities they undertake. Work specifically around the concept of serious leisure has been led by Stebbins (1982, 1996, 2009). He contrasts casual activities such as watching football with what he describes serious leisure as being the "systematic pursuit of an amateur, hobbyist, or volunteer activity sufficiently substantial, interesting, and fulfilling for the participant to find a (leisure) career there" (Stebbins, 2009, p.764). Such leisure activities may make significant demands on volunteers and Stebbins (1996, p.216) suggests "serious leisure volunteering as *career* volunteering" (italics in original). Observing there is more depth and commitment when individuals feel deeply about their volunteering (Stebbins 2009), he notes that the volunteer may have to wait for long periods of time before the rewards of their volunteering are achieved. Pearce (1993) had expressed a less positive perspective arguing that volunteering can be like leisure except undertaken in an organisational setting but, whilst done for enjoyment, "few people undertake hobbies that require the sustained discipline that usually characterizes organizational roles" (p.181). The notion of serious leisure is relevant to my research given the commitment involved in qualifying for certain heritage railway roles (e.g. locomotive driver), and the responsibilities that follow, an issue I return to later in the thesis.

However, as the concept of serious leisure has become more accepted, there has been the now familiar tendency towards categorisation with some twenty-nine types of leisure fitted into six broad categories, and the types of leisure sub-divided into specific activities and interests (Elkington and Stebbins, 2014). This tendency towards categorisation creates an issue about where a particular activity should be listed and, indeed, whilst 'heritage' appears as a category, it is set only in the context of an administrative activity within a broader cultural categorisation (Elkington and Stebbins 2014). As with other areas of volunteer scholarship whilst categorisations may be useful they do not provide depth of understanding.

The London Olympics and Paralympics in 2012 was the subject of research by Wilkes (2016) using Stebbins' (2009) serious leisure framework to explore the experience of those volunteers who were Games Makers. Wilkes (2016) proposed that Stebbins (2009) idea around career volunteering is actually "even more complex" (p.21) as some volunteers at the Olympics were serial episodic volunteers, but not with the same organisation. A further point made by Wilkes (2016) was that not all volunteers found their volunteering a good experience as volunteers may form into cliques and training and work experience may not be sufficiently challenging.

In the next sub-section the literature embracing volunteers, leisure and tourism drawing together some themes for my research will be addressed.

2.3.6 Volunteers, leisure and tourism

Leisure, volunteers and tourism are brought together in the paper by Smith and Holmes (2009) with some useful development of a model looking at this area. The tourism industry is complicated with for-profit operators where "Most tourism volunteers are both hosts and guests, their volunteering is a form of leisure" Smith and Holmes (2009, p.405). This definition describes those volunteers who work in the locality of the tourist attraction – the "hosts", and those who travel some distance to volunteer there – the "guests". This duality of volunteer identity at heritage attractions identified by Smith and Holmes (2009) potentially adds further complexity although perhaps not to individual volunteer's construction of their identity as their reasons for volunteering may be less subtle as discussed above. Smith and Holmes (2009) identify three types of tourist attractions one of which is the provision of "destination services" which may occur as "ongoing, seasonal or episodic" (p.407 Figure 1), with different volunteering profiles in respect of commitment of time to volunteering. Those in ongoing activities are at the attraction most of the time, those for episodic events are likely to be episodic volunteers. The different types of attractions identified by Smith and Holmes (2009) set the volunteering process in an organisational context, with the needs of the organisation driving differing reasons for volunteers to engage (Rochester, 2012; Holmes and Slater, 2012; Harp, et al., 2017; Brudney, et al., (2019); Kappelides, et al., 2019). The three different volunteering profiles described by Smith and Holmes (2009) may, of course, occur within one organisation and, rather than different volunteers to cover each profile the same volunteers may work to differing time frames at different points during the year. Indeed, the heritage steam railway the subject of my research holds events fitting each of these three different categories.

Literature about volunteering at heritage steam railways is very limited within the context of tourism volunteering, with such research as there is mostly being concerned with the motivation of volunteers. Taking something of an auto-ethnographic perspective Wallace (2006) suggests "working as a volunteer becomes a kind of pilgrimage in which the baggage of external identity renders itself invisible" (p.229). He identifies the main motivation of footplate volunteers as preserving historic industrial past. The idea of volunteering as "pilgrimage" (Wallace, 2006) is somewhat similar to the "tourism volunteer" of Smith and Holmes (2009). Concerning itself with how it might help managers to recruit new volunteers, a quantitative paper by Rhoden, et al. (2009) looked at volunteers on a heritage steam railway to investigate motivations. Findings included that 87% of the respondents were male, over 55 years and a third of them had prior experience in railways, transport or engineering. Older volunteers did so "in response to a need to provide a work substitute" (Rhoden, et al., 2009:32) whilst younger people volunteered for social/affiliative reasons. These papers by Wallace (2006) and Rhoden (2009) whilst illustrating that heritage railway volunteers typically are quite focused, did not extend understanding and different methodologies might have been employed. Wallace (2006) provided no methodology, and Rhoden et al. (2009) relied on a questionnaire design based on their literature review which included little about the specific sector. With little specific to the sector, it was identified as predominantly male in contrast to other cultural heritage studies, and the volunteer's passion for the sector – Wallace (2006) "pilgrims", and Rhoden, et al. (2009) noted that those who worked, or had worked in, related fields "expressed a desire to spend their leisure time in a similar environment or job role" (p.32). Several short papers were discovered during my research but as these were in non-peer reviewed journals they are not included here. The lack of peer-reviewed papers in the heritage railway sector indicates the importance of the need for further empirical studies. My study goes some way to addressing this lack.

This section has considered literature addressing volunteers from a number of perspectives and has endeavoured to work from a macro to a meso perspective looking at aspects closer to my research question and identifying the complexity of volunteering frameworks. The issue of volunteering in risky or dangerous environments has a focus on circumstances where volunteers may put themselves at personal risk as a regular part of their activities. Where risk exists but is more remote does not appear to be well covered by the literature. The literature of serious leisure intersects with that of risky volunteering in circumstances where volunteers dealing with risk show high levels of commitment to their activity and organisation. Having considered volunteers and their activities, the next section will address the management of those volunteers.

2.4 Managing volunteers

As noted above a voluntary organisation requires some form of structure to be able to operate effectively. This section concerns literature relating to the management of the volunteers and reviews this topic in three parts, the first considers those who are paid managers as this is the most commonly found approach in voluntary organisations; secondly a section on the practice of human resource management in the management of volunteers, and thirdly reviewing literature on unpaid volunteer managers.

2.4.1 Paid managers of volunteers

Where the management of volunteers has been addressed in the literature, there is a general assumption that management is undertaken by professional, paid staff (Holmes, 2004; Brudney and Meijs, 2009; Waikayi, et al., 2012; Chen, 2014; McNamee and Peterson, 2014; Hager and Brudney, 2015; Struder, 2016; Einasdottir and Osia, 2020). Paid staff provide a significant input to the voluntary sector in the UK employing 951,611 people (NCVO 2022a) of whom 63% are in managerial or professional roles (NCVO 2021). In this section 'volunteer managers' will refer to those managers who undertake a variety of positions in the management of the organisation, and 'managers of volunteers' those who with specific responsibilities for managing volunteers and their activities. Unsurprisingly, this is not a clear-cut distinction as some managers may undertake both.

Given the overall tendency within this literature, a categorising approach dominates discussions of management activity. 'Who is a volunteer manager?' is thus yet another definitional issue. Brewis, et al. (2010) point out that many organisations in the voluntary sector have paid managers who undertake differing management activities. Some have responsibilities solely for manging volunteers, whilst some manage volunteers as part of their wider role. Additionally, sometimes management roles are undertaken by unpaid Trustees or other volunteers, and this is discussed further in section 2.4.3 below. However, it is noteworthy that Connors (2012) writing in a handbook for volunteer managers makes the assumption the managers of volunteers are paid professionals.

In making a case for the professionalisation of the volunteer manager role, Haski-Leventhal (2009) in Australia and Howlett (2010) in the United Kingdom observe paid volunteer managers wishing to develop within a professional setting established the Association of Volunteer Managers. In setting out the case for professionalisation Haski-Leventhal (2009, p.2) writes "Management of volunteers is an occupation, that it is a job (usually a paid one)." A distinction is drawn between managing paid workers and volunteers, and even with emerging professionalisation, organizing "amateurs is unimportant and low status....and thus unworthy of attention and undeserving of resources" (Howlett 2010, p.357). The use here of amateurs is at odds, with for example Stebbins' (2009) ideas of those who are engaged in serious leisure.

As highlighted earlier Hill and Stevens (2011) developed their typology to demonstrate voluntary organisations had differing organisational governance structures involving different approaches to functional management. A typology is helpful but offers a broad overview and generalisation that does not reflect the likely wide variations within and across voluntary organisations. Writing on the "take up of professional management procedures" Holmes (2004) noted what she described as the impact of the "contract culture and the need to apply for public funding" (p77) as a pressure on paid volunteer managers to introduce professional management procedures. In her research on the impact of professional management on volunteers as assessed by the Volunteer Management Orientation Score which looked at factors such as programme planning, job design, recruitment supervision and evaluation, she found that professional management did not alter volunteers' perceptions that it made "the nature of volunteering to make it more like work" (Holmes 2004, p.91). This seems something of a mixed outcome for the managers and the volunteers. Only professional managers were included in the research, which did not consider volunteers as possible managers. Further research has investigated what paid managers might focus on when managing volunteers, Barnes and Sharpe (2009) found a different view of the relationship between paid staff and volunteers in their study of volunteer management in a Canadian urban park. The study context was notable for its collaborative approach and the lack of distinction between volunteers and paid staff and, whilst most of the managing activity was carried out by paid staff, some volunteers did undertake supervisory responsibilities. In noting an emphasis on informality and flexibility Barnes and Sharpe (2009, p.185) suggested that the "received idea of volunteering and volunteer management .... built on a business approach may actually be the element that is alienating volunteers in itself". Relatedly, in an exploratory study Waikayi, et al. (2012) looking at British Red Cross shops found the paid managers "caring attitude" (p.360) to be important to volunteers, and they considered retention of volunteers might be attributed to a "proactive management style in terms of creating a favourable work environment" (p.362). These two studies suggest that professional paid management of volunteers, might have differing results.

As well as the approaches and attitudes taken by managers being factors in retaining volunteers, a longitudinal study by Wollebaek (2009) identified an important structural factor as being "a diverse organization that does not place excessive demands on members" (p.280). In this respect a more recent study by Einarsdottir and Osia (2020) found that tensions do exist in a Fire and Rescue organization which also utilised volunteers. The volunteers and paid employees were often co-workers, but there were sources of tension arising, for example, from differing perceptions of the volunteers and their activities. The paid management saw the volunteers as a valuable additional resource whereas the paid employees perceived the volunteers as competitors for jobs, with the volunteers seeing themselves as “2nd class citizens” (Einarsdottir and Osia, 2020 p.884). Whilst the context above is one of volunteering in the public sector in a management-led organization, volunteers and paid employees working alongside each other arises in voluntary organisations in different sectors and with different organisational structures. That the management team have different perceptions from their paid employees and volunteers is not uncommon, and research by Ward and Greene (2018) within the National Trust found that those volunteers with a strong commitment to the organisation not infrequently viewed this from a local rather than from an organisation-wide perspective. This was found to produce emotional challenges for the paid managers as some volunteers were prepared to criticise both the managers and the approach they adopted to the delivery of organisational policies.

Nevertheless, Ward and Greene (2018) note the “lack of literature that explores the everyday realities of managing volunteers” (p.1158), and that such literature as there is tends to “provide an account of *what* managers do and why, not *how it feels* to engage in this relationship” (p1158 italics in original). This highlights the need for research that examines the everyday reality and identity of unpaid volunteer managers, the focus of this thesis.

Within the literature about paid managers of volunteers the human resource management process is often discussed as a tool to enable managers to professionalise and enhance their people management activities. The next sub-section will consider the human resource management practice in the management of volunteers.

2.4.2 Managing volunteers by paid managers and issues of human resource management

Human resource management a term used to describe the process of managing people in organisations, covering all aspects of people management from their recruitment to retirement. It is typically adopted by most organisations with paid staff, the situation though is less clear in the voluntary sector. Despite calls for managers of volunteers to move away from utilising human resource management practices used for paid employees for volunteers (Brudney and Meijs, 2009) there are also calls for human resource management practices to be more focused on the needs of volunteers (Alfes, et al., 2017; Traeger and Alfes, 2019; Prince and Piatik, 2023). Proposing that non-profit organisations consider human resource management strategically Akingbola, et al. (2013) suggest a model of strategic human resource management which recognises the multifaceted nature of voluntary organisations. Akingbola, et al. (2013) suggest that human resource management practices developed to recruit and retain paid staff are less interchangeable with volunteers. That nonprofits will be able to adopt a strategic human resource management approach seems to pre-suppose the organization has employees competent to do so – ignoring those organizations unable to do so with either paid or volunteer staff.

Relatedly, Alfes, et al. (2017) reinforce the importance of human resource management approaches for volunteers, although they question whether practices used for paid employment can be easily transferred to the voluntary sector. Whilst considering the risk of creating an overly rigid environment for volunteers, Alfes, et al. (2017, p.88) ultimately conclude that human resource management can be positive for volunteers and organisations alike. Considering the potential benefits of volunteer satisfaction and engagement Traeger and Alfes (2019) encourage volunteer managers to consider utilising inter-related human resource management practices.

Identifying a volunteer coordinator role as being that of the agent who recruits for the organisation and who also is a line manager of volunteers, Wu Berberich (2015, p.48), argues “the volunteer coordinator role is more complex than the line manager of paid employees owing to the complexity of the volunteering role and the sector”. The volunteer coordinators concern would be with macro issues whilst the practice of human resource management was devolved to line managers (Wu Berberich, 2015) and the “competence of the volunteer coordinator and formal volunteer management policies and practices are two important ingredients in volunteer management professionalisation” (p.213). The sophistication, scale and financial capacity of the organisation might seem to impact upon the ability to achieve this. Given that the actors proposed are paid staff of the organisation, the opportunity to develop both personal competence and to create sound formal policies and procedures might seem to exist as if in a conventional paid employment environment – however critically, the unpaid volunteer line manager remains unconsidered. That “general volunteer management literature is strongly grounded in the transfer of classical HRM approach” is argued by Studer (2016, p.689), in her exploratory quantitative study looking at volunteer management responses to the uniqueness of volunteers. Adopting an approach to improve the professional volunteer manager's effectiveness, and by seeking a reductionist approach something of the special requirements of volunteers (Studer 2016) is likely to be missed.

Challenging the apparent domination of the idea volunteers are much the same as part-time staff Brudney and Meijs (2009) propose a shift of focus in human resource management from recruitment to retention. Proposing a natural resource conception of volunteer energy Brudney and Meijs (2009) suggest the key features of such an approach attracting people into volunteering and retaining them throughout the course of their life in organisations. From a volunteer management perspective, they propose that what volunteers might give comes from the skill and time they are able to provide (Brudney and Meijs 2009) which may if managed well enhance volunteer retention. For some organisations volunteer retention may be an issue, for others less so, Davenport, et al. (2021) noted sometimes volunteers resisted leaving, presenting a different set of issues for those managing volunteers.

When they conclude managing volunteers utilising human resource management approaches often does not produce the normally expected outcomes Hagar and Brudney (2015) are summarising their research looking at how volunteers are managed by paid staff. They considered eight items of best practice and undertook a survey among not-for-profit organizations in the USA. From their results they highlight the importance of contextualising practice suggesting a "tool box approach" (Hagar and Brudney, 2015, p.252) which has within it a range of human resource practices to draw upon according to the needs of a particular organisation.

From a sample of 37 cities in the USA Choudhury (2010) found volunteers are not as well-used as they might be along with an accompanying failure of those managing them to learn from best practice. It seems there is still more work to do despite the call by Hagar and Brudney (2015) to encourage more awareness of best practices in effective volunteer management. However, studying pastors in small churches in the USA, Smith (2020) found the training programme the pastors undertook did not equip them with sufficient understanding of people management issues, specifically understanding the difference between volunteers and employees, and in the management of volunteers. Pastors were at risk of burn out from pressures including a misunderstanding in their expectation that volunteers would work in a similar way to that found in the paid employment environment (Smith 2020). The lack of training in people management skills in the voluntary sector might make it seem unpaid volunteer managers are even more likely to receive no training in this area at all. Training, or lack of it, was mentioned by Walker, et al. (2019) as a factor in volunteer turnover. This is pertinent when there are compulsory training requirements associated with volunteering, as in regulated contexts such as studied in this thesis. Training that was undertaken for a specific, perilous context, of crewing lifeboats, which requires long and continuous training was found by O'Toole and Calvard (2020) to achieve "predictability and reliability" (p.81).

When considering the attraction, recruitment and retention of volunteers Harp, et al., (2017) found the provision of inadequate training a disadvantage and that paid volunteer coordinators require familiarity with the training process. Bussell and Forbes

(2003) note the importance of identifying training needs and then providing the relevant training, whilst Clayton, (2016) looking at episodic volunteer stewards at music festivals observes training through training sessions or on-the-job activity promoted retention and repeat volunteering. Despite recognition that training is important, it is not always delivered, as Nesbit, et al., (2018) found in their research that many volunteer [paid] managers did not receive professional training, and, perhaps rather worryingly, organisations may find it hard to pass on to volunteers complicated tasks requiring training.

Studer and von Schnurbein (2013, p.406) set out a number of criteria that reviewed in a human resource management framework, the similarities and differences between volunteers and paid staff. Of the twenty-three criteria identified only seven were similar for both volunteers and paid staff. These include the "meaning of the activity, function/task structure, commitment/job attitudes" (Studer and von Schnurbein, 2013: Table 2 p.412). That volunteers and paid staff perceive a variety of human resource-related criteria differently has implications for both those paid staff engaged in managing volunteers, and potential difficulty for those unpaid volunteers who undertake management. Reviewing work targets and the performance management of volunteers, Read (2021) notes the application of human resource management practices from the paid workplace can be helpful. However, although volunteers donate their time and effort, in the organisations she studied their efforts were monitored in a similar way to paid employees.

One of the complexities mentioned by Read (2021) has been the contract culture that has arisen especially around those volunteer-using organisations that rely on contractual relationship with clients, donors or government. These actors require detailed understanding of how funds are spent and that becomes a driver to further the professionalisation of volunteer management. Whilst there are concerns how paid professional volunteer managers may improve their own skills, the performance of the organisation and demonstration of the effective use of funds, how this might be achieved in the different volunteer context is unclear.

Overall then the observation by Hill and Stevens (2011) that volunteers who undertake management activities have been “largely excluded from the analysis” (p.107) still stands. In this section, research on paid volunteer managers and human resource management has considered their motivation (Chen, 2014) and application of human resource management (HRM) practices (Shin and Kleiner, 2003; Hagar and Brudney, 2015; Studer, 2016). Alfes, et al. (2017) noted the implication that HRM practices from the employed sector can be transferred to the voluntary sector may need modification. Such research focuses on providing prescriptive advice to paid volunteer managers, and it highlights relevant issues but does not address the important question of how such advice might apply to volunteers who are undertaking management activities. There is little research addressing what unpaid volunteer managers actually do and how they perform their responsibilities, (Hill and Stevens, 2011; Machin and Payne, 2008; De Clerck, et al., 2019).

The next sub-section will address literature that does consider unpaid volunteer managers who manage other volunteers.

2.4.3 Managing volunteers – unpaid managers

This sub-section will explore the limited literature looking specifically at unpaid volunteer managers of volunteers. A point to note is sometimes a lack of clear job titles for volunteers engaging in management activities (which would be required in paid employment), resulting in the extent of their management responsibilities potentially being invisible to researchers (Machin and Payne 2008). This highlights a potential reason for a significant group – volunteers who manage other volunteers – being under-researched (Hill and Stevens, 2011). Whilst Stebbins (2009) proposed the notion of a volunteer career, human resource management literature addressing career seems not to include unpaid volunteer managers. A standard human resource management text (Beardwell and Thompson (2017) has no reference to the subject, Bagdadli and Gianeccini (2019) consider career success being advancement and pay among their criteria, and Inkson (2018) considers boundaryless careers looking at a variety of paid career options.

A human resource management perspective is sometimes adopted in voluntary organisations based on that utilised in paid employment situations however, as Alfes et al. (2017, p.63) observe there are significant differences regarding volunteers. That HRM practices may, or may not, be used in the volunteer context is unclear given as Milbourne (2013) observes, 75% of small volunteer organisations do not benefit from being researched.

However, Brewis et al. (2010) explored volunteer management and found in their survey of 1,014 volunteers undertaking management activities that 15% were in roles of ‘volunteer coordinator’ or ‘volunteer manager’, the remainder undertaking general management roles that included the management of volunteers as a part of their primary role. This is perhaps not inconsistent with the common notion of management in organisations but the environment of the volunteer is different with less time and resources to devote to developing human resource management skills (Hagar and Brudney, 2015).

The coordinator role was identified by Pearce (1993) in voluntary organisations with the prime task of the coordinator being to ensure sufficient volunteers are available for any given task. Pearce (1993) further emphasised that volunteer-staffed organisations needed competent management, she called them coordinators a title which may down-play the role a little. Noting that the management of volunteers was not the most popular of tasks, Pearce (1993) was not surprised to find that often the first paid positions in voluntary organisations were to provide the management of volunteers. Factors in the unattractiveness of the position were that some volunteers did not acquiesce to following organisational instructions and the degree of standardisation of activities the organisation might have.

In their research into volunteers who manage other volunteers Hill and Stevens (2011) study found that most volunteers who managed were in organisations with less than twenty paid staff. The volunteer experience reflected that of paid volunteer managers in that less than half of their volunteer time was spent the management of volunteers.

They also found that a high percentage (nearly three-quarters) occupied positions such as "chief executive, chair or trustee" (Hill and Stevens 2011 p.108). Observing the formalisation of management practices was "considerably lower for VMVs [volunteers managing other volunteers] than for their paid counterparts" (Hill and Stevens 2011, p.110), they suggest the use of some essentially HRM practices to be seen as the "gold standard" (p.110) of volunteer management – a policy for volunteer management, task descriptions, and induction. Linking the work of unpaid volunteer managers with the striving for professionalisation among paid managers, they observed that the changing methods of funding voluntary organizations is a driver for this. Hill and Stevens (2011) expressed concerns at the application of management systems appropriate to paid staff to volunteers, that unpaid volunteer managers typically manage volunteers alongside their other volunteer activities and utilise fewer approaches to managing as they may need support and training to achieve new skills. Finally, Hill and Stevens (2011, p.113) note "the volunteer may be reluctant to take the burden of responsibility that the label 'management' implies".

Concerns have been expressed about the boundaries between the organisation and the wider community, particularly about the ways in which public-facing volunteers communicate about the organisation and its activities, and what this may mean for the managers of volunteers. Researching the London Olympics and Paralympics 2012, (Harris 2012) looked at volunteers who were 'Ambassadors' based at 43 sites around London and providing answers and advice to potential visitors to the Games. She found a "blurring of public sector understanding of the meaning of volunteering, but also to the boundaries between volunteers and those working for remuneration" (Harris, 2012, p.420). Looking at hospice volunteers and the gap between the volunteers and the wider community, Morris, et al. (2017) refer to activities that would help paid volunteer managers, for example in finding ways to control what volunteers communicate about the organisation to others.

In his study of Scouting leaders Talbot (2015) noted, similarly to Wilkes (2016) above, that volunteering "should not always be seen as a positive 'phenomenon'" (p.218), and volunteer leaders might be devoting more time to their activities than they really have available, subsequently suffering from burnout. In commenting on the challenge of finding volunteers for leadership positions Talbot (2015) noted that sometimes vacant positions were left unfilled. In her study of leaders in grassroots associations (mostly volunteer-led and run) in Australia, Mex (2019) identified some of the reasons volunteers did not want to lead or manage others as: the responsibility, time, being afraid/shy, not liking meetings, having few or no skills for committee work, a dislike of politics and personality conflicts. There seem to be two themes arising here, one that on volunteering for a leadership position (Talbot 2015), unless care is taken, especially of time management, there is a possibility of burnout, and the other that an awareness of the downsides, and perhaps knowing of one's own lack of skill or confidence in some areas discourages individuals volunteering for leadership and management positions.

Researching human resource practices in Australian rugby clubs, Cuskelly, et al. (2006) collected data to understand human resource management practices in volunteer management. They used data collected to develop a Volunteer Management Inventory which could assist in the management of volunteers and the prediction of volunteer retention. Using a large sample of mostly board level volunteers, “presidents, secretaries, registrars, including in some cases paid staff” Cuskelly, et al. (2006, p.147) developed a seven-factor model of human resource practices – planning, recruitment, screening, orientation, training, performance management, recognition, which they hypothesised if carried out effectively by volunteer managers could lead to volunteer retention. They note “highly formalised HRM practices might not fit comfortably with the management of volunteers” Cuskelly, et al. (2006, p.157). What this does not seem to address is whether the unpaid volunteer managers have the skills, knowledge and, maybe, confidence to utilise these management practices.

Exploring a similar context (Australian rugby community sports clubs), Taylor, et al. (2006) found volunteer expectations often were not met because at club level administrators were not aware of them. Policies and practices that might lead to volunteer satisfaction were not in place, and volunteer workload was increasing because of the professionalisation of rugby, leading some volunteer administrators to feel “they could not leave their volunteer positions because there was nobody to take their place” (Taylor, et al., 2006, p.142).

Looking at paid volunteer managers Einholf (2018) found the prevalence of human resource management practices and considered it worthwhile to comment on Barnes and Sharpe (2009) who researched within an all-volunteer organisation which did not comply with the HRM model at all. The work of Barnes and Sharpe (2009) explored a context, in a public park, in which volunteers were able to “engage in initiatives that were driven by their own interests” (p.182). The authors though likened the management activity as more related to project management than the management of volunteers. Noting that different models of volunteer management such as HRM, motive fulfilment, the psychological contract and social environment are not mutually exclusive, Einholf (2018, p.170) highlighted the need for more extensive research of this topic.

This section has considered the limited literature addressing the management of volunteer by other volunteers, the next subsection will consider literature on volunteer leadership as it seems that sometimes ‘leadership’ activities in a volunteer context might be construed as activities of ‘management’.

2.4.4 Volunteer leadership

This section will explore the notion of volunteers as leaders rather than managers, another area where there is complexity as the structure of the organisation provides an overlay to actual activity. That volunteers can be leaders as Trustees and Chairs of voluntary organisations was recognised by Hill and Stevens (2011) in their typology. Some scholars have sought to understand volunteer management from a leadership perspective, Schreiner, et al. (2018) undertaking two studies looking at leadership behaviour, albeit of paid volunteer leaders, with concern expressed about “the limited attention given to the differences between volunteers and employees with regards to how they are managed” (Schreiner, et al., 2018, p.244). Some of the confusion and lack of clarity observed in the previous section about those involved in volunteer management is not necessarily helped when the point is made that “volunteer coordinators are in fact in a leader role” (Schreiner, et al., 2018, p.254).

De Clerck, et al. (2019, 2021) are rare studies of the leading of volunteers by other unpaid volunteers. Their research focuses specifically on unpaid volunteers at Board or Director level in sports organizations, and considers how volunteers perceive the leadership style of their leaders. De Clerck, et al. (2021) explores the motivating or demotivating styles that may be adopted by unpaid volunteer leaders. This is set out as an important issue as “the motivating style of volunteer board members requires special attention as they often take on the (only) leading role in the organization without prior training and experience” (p.1272). This reinforces the important point reflecting concern about not only leaders but also unpaid volunteer managers. Using self-determination theory as a tool, De Clerck, et al. (2019) explored the perceptions of volunteer coaches and volunteers in the sports clubs and found autonomy/supportive approaches motivated volunteers, whilst demotivating actions put volunteers under pressure creating concerns about whether they would continue volunteering. In considering the environment of volunteering De Clerck, et al. (2019, p.1281) suggested that “the volunteering context which probably puts less emphasis on essential (management) trainings.” Perhaps this echoes the observation from Einholf (2018, p.158) who noted of some studies that they “suffered from the problem of being obvious and lacking utility to volunteer managers.” Continuing their studies of Board members and Directors as the leaders of the organizations, De Clerck, et al. (2021) called for “more research in diverse all-volunteer settings is needed to understand how volunteer leaders can take up the challenge to manage and lead their organization” (De Clerck, et al., 2021:486).

The work of De Clerck, et al. (2019, 2021) provides some useful insights into the leadership approaches adopted by unpaid volunteers leading their organizations and can be used alongside further research into unpaid volunteer managers. Indeed, the complexity of volunteer roles considered in research across this review highlights the need for research that engages with volunteers own experiences of leadership and management.

This subsection has explored some aspects of leadership in voluntary organisations as managing volunteers is associated with the leadership provided for, and sometimes by, volunteers. The next section will conclude the chapter and provide a summary of the key points.

2.5 Conclusions

This chapter exploring the literature of volunteering is wide as the scale and complexity of the voluntary sector is uncovered. The scale is considerable and varied as volunteering is undertaken in many different sectors of society. The point made by Rochester, et al. (2012, p.9) that “the concept most people have of voluntary action is incomplete” seems an apt summary. The organisations within the sector vary in the activities they undertake, in size and scope of their operations. Given the complexity the perceptions of potential volunteers about what they may be getting themselves into are likely to be incomplete, providing challenges for the recruitment of volunteers.

Voluntary sector organisations vary in the way they are structured and in their governance arrangements, which is a factor in the approaches adopted towards the management of volunteers within an organisation. As in any work context, the experiences of volunteers are likely to vary following the individual volunteer experience of being managed. How volunteers themselves support their chosen voluntary organisations, apart from philanthropic activities, is primarily a function of the amount of time an individual is willing to give, unpaid, to the organisation. The nature of activity undertaken by a volunteer can vary from episodic occurrences to considerable involvement at the core of the organisation (Pearce 1993; Holmes and Slater, 2012; Ho and O'Donohoe, 2014).

Literature on risky volunteering was considered as some organisations require their volunteers to deal with risk. Lifeboat volunteering (O'Toole, 2013; O'Toole and Grey, 2016) involves peril and a real risk to the volunteer's life, whilst elsewhere other activities may involve risks to others (McNamee and Peterson, 2016). The concept of serious leisure (Stebbins, 2009) identifies volunteers who are committed to their volunteering sufficiently for it to be considered another form of career. The ideas of risky volunteering and serious volunteers conjoin to create an environment in which the competence of the volunteer and the training provided to build that competence play a key part.

Voluntary organisations require management, the same as any other organisation, an issue here being that the literature mostly considers only those managers employed and paid by those voluntary organisations. The process of managing volunteers is perhaps unusual. In normal paid work becoming a manager is a desired goal; Pearce (1993) found the role of volunteer coordinator (managing the allocation of tasks and people) to be important but “unattractive” (p.47). The adoption of human resource management practices in voluntary organisations is less than clear and the particular circumstances of the voluntary sector have not been fully addressed.

Unpaid volunteers who manage other volunteers have received little attention in the literature, perhaps because many of them volunteer in organisations that fall outside the gaze of research (Milbourne (2013). Thus, there are many calls for further research in this important area (Einholf 2018; De Clerck, et al., 2021).

I now consider the status of theory in relation to volunteers navigating the experience of becoming managers and the implications of this for the focus of my thesis.

Whilst the literature of volunteering is diverse it has a focus on action (Rochester, 2012) within the sector addressing issues such as volunteering in society, recruiting volunteers, and providing advice to volunteer organisations. There is no overarching theory of volunteering (Kragt and Holtrop, 2019) and literature addressing theories of volunteering draws from areas such as sociology, psychology, and economics with no clear single focus. Literature which has addressed theoretical constructs in volunteering is developed from areas such as sociology, economics and psychology and the focus on the uniqueness of volunteering is often dissipated. Where volunteering is theorised it is mostly within a context of voluntary activities (e.g. Pearce, 1993; Rochester, et al., 2012; Einholf and Yung, 2013). When looking beyond the activity of volunteering to other aspects of voluntary organisation, most work draws on theories that are transferred from research in the paid employment sector often with little adaptation for the volunteer context (Vantilborgh, 2011, 2014; Nicols, 2012) missing what Studer (2016) observes is the need for different responses for the volunteer situation.

Significantly for my thesis a recurring issue identified in the volunteering literature is the tendency to respond to the disparate nature and complexity of voluntary activity by creating categories and typologies in attempts to put some structure in place to aid theorising (Pearce, 1993; Cnaan, et al., 1996; Brudney, et al., 2019; Rochester, et al., 2012; Holmes and Slater, 2012). Typologies and categorisations have some utility to aid understanding, however, they also imply definitive boundaries. An example might be of a volunteer as a member of a workgroup whilst also managing that workgroup, requiring engagement in complex identity work to construct an identity, or identities to facilitate constant crossing of those permeable boundaries. Boundaries between categories and within typologies (Cnaan, et al., 1996; Hill and Stevens, 2011; Holmes and Slater, 2012; Brudney, et al., 2019) imply there is a tidy and ordered structure into which volunteer experiences fit. Understandings of volunteering then focus on experiences within these categories, whereas to better understand volunteers who manage other volunteers requires that we attend to experiences that do not neatly fit existing models.

Therefore, in focusing on volunteers who manage other volunteers, it becomes necessary to consider the nature of boundary crossing and individual experiences of boundary management, engaging with the complexity of their volunteering. The management of boundaries by volunteers has impact not only on their volunteering activity but also enrols identity work and is implicated in the (re)creation of their identities. This connection to identity work is further explored in Chapter 3.

These boundaries require further consideration with a focus on volunteering that we might better understand how volunteers navigate the experience of becoming managers with associated boundaries and their crossing, as theorising has focused on paid managers of volunteers (Tushman and Scanlon, 1981; Korschun, 2015; Needham, et al., 2017).

This need to unpack boundaries experiences of navigating and managing boundaries, the tensions that occur at them, and their management by volunteers is addressed in the three sub-research questions of this thesis: In what ways are routes to volunteering navigated?, What are volunteers experiences of becoming a manager?, How do volunteers engage with multiple position holding? Table 2.4 below provides a more detailed review of existing conceptualisations of volunteering and boundaries and considers organisational scale, scope, and structure routes into volunteering, managing volunteers, 'risky' volunteering, multiple position holding and typologies. The Table highlights particular boundaries, the source of issues and tensions, concerns and theoretical gaps and the relevance for this thesis. Whilst boundary issues are observed for the three research sub-questions of the thesis, also considered are other relevant sources of boundary tensions – organisation scale, structure and scope, volunteer commitment to 'risky' volunteering, and typologies themselves.

Table 2.4 Boundary issues and tensions and their relevance to this thesis

Boundary	Source of boundary issues and tensions	Key concerns identified from literature review	Issues/Theoretical gaps	Relevance to this thesis
Organisational scale and scope	Financial capacity and focus of activity. Income ranges <£10,000 to >£100 million per year. Scope: Focus on social/public policy areas. Heritage sector under-researched.	Financial considerations create categorisation. However, there is an imbalance in the research with a focus on larger organisations.	Small organisations get little attention (Milbourne 2013). Theory development unbalanced, with most focus in areas of public policy.. Detail and nuance lost in broad categorisations.	This thesis affords the opportunity to research a smaller/ medium sized organisation in the under-researched heritage sector.
Routes into volunteering	(i) General but differing reasons offered, e.g the volunteers own agenda, psychological contracts, the needs of the organisation, pro-social motivation. (Clary, et al., 1998, Farmer and Fedor, 1999, 2001, Prinicipi, et al., 2012, Harp, et al., 2017, Aydinli, et al., 2016, Dury, et al., 2015). (ii) Specific family influences on navigation of routes to volunteering (O'Toole, 2013).	Questionnaire-based approaches establish typologies of reasons respondents selected to volunteer. Categories limit alternative responses and lack nuance. Situationally specific theorising.	Lists limit conceptions and theorisations of reasons for volunteering creating theoretical boundaries limiting understanding tensions around how individuals reconcile competing issues whilst navigating their route to volunteering. Further nuance in different situations	There is a need to understand better how volunteers narrate their routes to volunteering and manage boundary tensions, which this thesis addresses. This thesis provides the opportunity to extend theorising on the influence of family.

Managing volunteers	Broad assumption that volunteers are managed by paid managers (Holmes, 2004, Brudney and Meijs, 2009, Hagar and Brudney, 2015, Einasdottir and Osia, 2020). Boundaries and tensions for unpaid volunteer managers little understood.	Literature focuses on the issues and activities of paid managers. It supplies advice drawn from management literature. Tensions explored at boundaries between paid managers, paid staff and volunteers (Ward and Greene, 2018, Einasdottir and Osia, 2020).	Volunteer managers may be 'invisible' because of their job title (not stating 'manager'). Management approaches vary with volunteers treated differently (Einasdottir and Osia, 2020). Individual management skills variable around e.g. affordability/time for training related to boundary created by organisational scale.	This thesis provides an opportunity to explore and theorise routes to volunteer management.
Multiple position holding	Tushman and Scanlon,(1981); Multiple positions (MacLean and Webber, 2015; Steilmel, 2018; Campion, et al., 2020; Currie and Logan, 2020. Within professional paid roles Martin, et al., 2017; Bresnen, et al., 2019)	The context of most research is within the context of paid professionals.	Volunteer research limited. Multiple position holding by volunteers generates complex boundaries and tensions to be negotiated.	By exploring the complexity of the tensions and boundary work of volunteers holding multiple positions this thesis contributes to theorising.
Volunteer commitment to 'risky' volunteering.	Volunteering with risks to the volunteer: disaster volunteers (Britton, 1991); firefighters (Lois, 1999; Baxter-Tomkins, 2011); lifeboat crew (O'Toole, 2013);	Risks of injury or death from volunteer activity in which the risks are known but not when they will occur.	A theoretical gap between where risks are known but occurrences unknown, and risks are known and are able of being controlled to an extent.	This thesis to contributes to theorisation about risky volunteering.

	search and rescue (Collie and Greene, 2023)	Boundaries between degree of risk.		
Typologies	Typologies Clary, et al (1996); Cnaan, et al., (1996) Stukas, et al., (2017) – motivation. Ho and O'Donohoe, (2014) – stereotyping young volunteers; Spear, et al., (2009) – social enterprises; Hill and Stevens (2011) – voluntary organisation structures; Keleman, et al., (2017) – as unpaid work.	Typologies classify individuals and activities. Often questionnaire based. Put individuals into boxes. Lack nuance. Typologies as a way of dealing with complexity. Discourages deeper research.	Seeking generalisations for volunteer actions. Positivist. Misses nuance of narrated reason by forcing into categories within the typology. Theorising based on positivist approach. Fixes the volunteer into a box, does not allow for temporal changes	There is a gap in understanding effects of typologies in creating boundaries within analytical and conceptual frameworks. There is a gap in hearing volunteer narratives to provide richer stories free of typologies. This thesis contributes insights to volunteer theorising. .

Table 2.4 summarised the issues of boundaries embedded in the existing literature associated with volunteers and volunteering activities that are encountered by volunteers and requiring identity work. Issues are noted because their relevance to this thesis covering those areas of organisational scope and scale, the navigation of routes into volunteering, commitment to 'risky' volunteering, managing volunteers, holding multiple positions and typologies. Because there is literature to be found within studies of paid employment, there is often an implicit assumption that understandings can simply be transferred. Much research thus underplays nuances relating specifically to the volunteer environment; particularly when considering volunteers who manage other volunteers. Typologies and categorisations of volunteering and volunteers, whilst

having their place, impose structures on our understanding during which important nuances may be lost. Having clearly set out the sources of boundary issues and tensions and noting that typologies themselves create boundaries this thesis addresses these issues. It develops new insights into volunteering by researching how routes into volunteering are navigated, the experiences of volunteers becoming managers and undertaking multiple positions this thesis contributes insights to the theories of volunteering. It utilises an identity lens, to address those boundaries created by typologies and categorisations of volunteering which is discussed further in Chapter 3.

Having addressed volunteering the next chapter will explore the literature of identity and will conclude by drawing from the literatures of volunteering and identity to develop a lens through which in Section 3.12 I develop a theoretical ‘route map’ to aid the reader through the thesis.

CHAPTER 3 – IDENTITY

3.1 Introduction

The previous chapter explored volunteers and volunteering and the management of volunteers within the context of voluntary organisations. The volunteering literature sometimes draws links to the world of paid employment in organisations in the context of volunteer management. In this chapter I review the concept of identity, looking specifically at the identity of the individual in the context of management and organisational studies. My focus will be on identity as it is created, and re-created within an organisation. The chapter will consider the antecedents of identity research, social identity theory, and then move into the organisational context and explore identity in organizations and key themes in the literature. Identity work looking at how an individual may construct their identity will be reviewed and I will unpack issues related to individuals holding multiple identities. Whether being in different locations may affect the individuals' re-construction of identity will be addressed as will socio-materiality. The chapter will end by considering whether identity is liminal (which is but one of the many debates within the construct of identity in organisations) and reviewing empirical work pertinent to my study of volunteers. The literature on identity also draws mostly on the paid work environment; there are opportunities for research to build understanding of identity in the voluntary sector and this thesis contributes to that literature.

3.2 Antecedents of identity theory

I start by exploring the antecedents of identity noting that this scholarship has a long and complex history. As a starting point to consider identity in its most simple sense, this basic definition of identity is taken from Collins English Dictionary: "a state of having unique identifying characteristics held by no other person or thing, and the individual characteristics by which a person or thing is recognised" (Collins, 1986). The key points here seem to be "unique identifying characteristics" by which "a person or thing is recognised". Ignoring things for the time being, it is essential to consider those characteristics that uniquely identify a person. This opens the potential for characteristics to be viewed from the perspective of the individual's self-identity, and also from the perspective of others', often with regard to membership of a group or groups (Tajfel and Turner, 1979).

Oshana (2010) noted that elements of the modern-day debates date from the ideas of the philosopher John Locke (1632–1704). Locke (1690) having, among many other things, considered the identity of vegetables and animals, considers man. Referring to personal identity Locke suggests "as consciousness always accompanies thinking, and it is that which makes everyone to be what he calls self...." (p.268), provides a useful starting point to subsequent thinking on identity as it explores the issues of individual identity construction.

Whilst my focus for this thesis is on organisations and the construction of identity in organisations, it is important to note the identity field is very wide and embedded in a range of disciplines including literature, philosophy, psychology, psychoanalysis, sociology, law, health and history. The search term 'identity' inputted to the Web of Science (6 August 2021) produced 472,318 results from a broad range of disciplines. When I first came to the very wide field of identity and undertook initial searches, I was struck by how siloed the subject appears to be, and scholars in a particular field of identity rarely, if ever, referring to scholars in another field.   As a, not to be considered accurate, assessment, for example reviewing the 17 pages of references in McKinlay and McVittie (2011), I identified only some 15 scholars who had names familiar to me from researching papers on identity in organisations for this thesis. Moreover, even within the field of identity in organisations some putting into silos may be observed, with Clarke and Knights (2020) noting their article is published in a handbook and is but "one of fifty more pieces.....which we could say, speaks volumes." (p.801). More recently Brown (2023) described the field of identity study as "...somewhat fragmented and heterogeneous" (p.*xiv*). As a result, this literature review must inevitably be selective focusing on identity in organisations.

Generally, we talk about ourselves fairly easily but scholars have questioned the notion of us having a clear grasp of who we, and others, are (McKinley and McVittie 2011). The scope of study embraced by identity is wide, context-dependent (du Gay, et al. 2000), and includes identities that may be categorised as national, ethnic, religious, gender, health, virtual, (McKinley and McVittie (2011), or occupational (LaPointe, 2010; Larson and Pearson, 2012; Fraher and Gabriel, 2014), and volunteering, (van Ingen and Wilson, 2017). This latter study is unusual in that it addresses volunteers, I come back to it in section 3.10.1. The next section will consider the antecedents of identity in the context of the individual and their interaction with society.

It is not my intention to delve deeply into the antecedents of the development of identity but to set my work into a broad context, Table 3.1 below summarises this broad context.

Table 3.1 Antecedent ideas

Key ideas	Key literature
Social interaction • The social process shapes society, self and social interaction, and each feeds back on the other.	Mead (1925/2011, p.84) Stryker (2008, p.18)
Identity • Identity theory by Stryker from the premise that society impacts self and self impacts social behaviour. • Identities are the self-cognitions tied to roles, and through roles to positions in organizational relationships.	Stryker (2008, p.20)
Reciprocal relations • Between self and society. • As a reflection of society the self is a multifaceted organized construct. • Differences in interpretation e.g. stable vs fluid.	Hogg et al. (1995)
Different usages of identity • Culture of a people. • Identification with a social category. • Meanings people attach to the multiple roles they play in society	Stryker and Burke (2000)

The antecedents of contemporary ideas on identity may be explored through the work of Mead (1925), who viewed humans as having a capacity to shape their own behaviour, identifying the self as a product of social interaction with others. The process of social interaction shapes society, whilst the self and social interaction blend thus continuing the shaping process, (Mead, 1925; Stryker, 2008), and Stryker (2008, p.19) refers to “Mead’s dictum that self mirrors society”, which is a concise way of setting it out. Referring to some of his earlier work Stryker (2008, p.20) argues identity theory was formulated “by specifying the terms of the premise that society impacts self impacts social behavior”. Continuing with ideas from his earlier work Stryker (2008) contends identities are self-cognitions associated with roles, and then through them to places in social relationships.

I discuss the debates around social identity theory a little further, as within the context of my research the multiplicity of individual and group identities is particularly pertinent as participants narrate self-identities or group identities, for example related to a department or function, and collective identities towards the organisation.

3.3 Social identity theory

Social identity theory is concerned with the social behaviour of people as they tend to classify themselves into groups. Table 3.2 below sets out literature relating to its genesis as a concept and subsequent development.

TABLE 3.2 Social Identity Theory – key literature

Key ideas	Key literature
• The individual in a group • In-group, out-group	Tajfel and Turner (1979), Ashforth and Mael (1989)
• Social category provides a definition of who one is, a self-definition that is part of the self-concept (p.259). • Articulates categorization with subjective belief structures, the nature of relations between own group and relevant out-groups. (p.260) • View identity theory and SIT as separate	Hogg, et al. (1995)
• See similarities and overlap between identity theory and social identity theory. • In social identity theory, a social identity is a person's knowledge that they belong to a group. (p.225) • The two theories have much in common	Stets and Burke (2000)
• The binary distinction has now become more textured (p.571) • Taxonomy now includes: - person-based social identities - relational social identities - group-based social identities - collective identities.	Hogg, et al. (2017) Pratt (2020)

In their seminal work on intergroup conflict, Tajfel and Taylor (1979) postulated that opportunities for an individual's identification and behaviour within a group might extend from having no involvement at all with a group, or groups, to behaviour fully determined by group membership. Within society those groups can be diverse and might include: nationality, religion, gender, age group, football clubs, voluntary organisations. As a member of a group an individual may develop a deep commitment to, and identify with it and its members, of a football club for example, and see others who identify as members of a competing football club as rivals, creating the notion of in-group and out-group, (Tajfel and Turner, 1979; Ashforth and Mael, 1989; Hogg, et al., 1995).

Arguing that individual sub-units within the organization may have "distinctive and enduring characteristics.....which may help the newcomer feel loyal and committed" (Ashforth and Mael, 1989, p.34) draw attention to groups in organisations. Further, they note an individual may have multiple identities which themselves may create inherent conflict. It is also possible for conflicts between groups to occur in the absence of objective causes, thus opening the possibility for conflict between sub-groups within one organisation (Ashforth and Mael, 1989). The possibility of conflicts arising between groups in one organisation is addressed later in the discussion in Chapter 9.

The idea of the individual and the group as strands of identity creation led Hogg et al. (1995) to see those two strands as personal identity and social identity. Within society there is a reflective relationship between the self and society, the self being a multifaceted organised construct, capable of being interpreted differently – identity as a stable or fluid construct for example (Hogg, et al., 1995). In developing their approach towards social identity theory (SIT) Hogg et al. (1995) considered SIT and identity theory as two separate constructs and argued that an individual's self-definition with a particular social category, for example nationality or identification with a sports team, is a separate construction of the self.

This is an articulation of subjective beliefs about the nature of relations between one's own group and relevant out-groups, (Hogg, et al., 1995, p.260), with the 'out-group' capable of being widely defined - from nationality to people in another part of the workplace, for example This wider definition has been narrowed by Kreiner et al. (2006) who explore the boundaries between the individual and the organisation and the co-creation of identity, noting the salience of tensions that emerge. An overall critique here is nevertheless that the co-creation of identity at boundaries implies a commonality of perspectives, offering a boundary as uniform and static. However, there may be differing perspectives within a group at a boundary, which might also evolve alongside developing understandings of identity. This highlights the need for in-depth empirical work within which understanding and experience of boundaries can be unpacked.

Debate around whether identity theory and SIT were related saw Stets and Burke (2000) identifying similarities and overlaps, and much in common between them. They argued that in social identity theory, "a social identity is a person's knowledge that they belong to a group", (p.225), rather than being a defining element in self-identity. With the development of scholarship, Hogg et al. (2017) concluded the identity theory/SIT debate had become more nuanced, a binary divide was too narrow and a taxonomy including individual, relational, group, and collective identities more appropriate. Nevertheless, further research is required to give consideration of the complexity of multiple social identities (Pratt, 2020; Koveshnikov, et al., 2020), and the effects of leaders on group members, (Hogg, et al., 2017; Ford, 2020).

Observing that the genesis of social identity theory was within the field of social psychology both Hogg, et al., (2017) and Pratt (2020) observed it has significantly influenced organisation studies. In this more recent attention to social identity theory Hogg, et al. (2017) have argued there are wider conceptual developments to reflect contemporary social changes. Pratt (2020) suggests attention be paid to issues of attachment, about how individuals relate to one another and to the organisation. These conceptual ideas however offer only a general overview of how individuals in volunteering organisations might experience and understand their identities and requires further examination.

Overall, then while social identity theory allows for group social interactions to impact upon the development of an identity by an individual, this conflicts to some extent with the idea that the individual is "typically the major author of their life story and the interventions (e.g. challenges of others) are written into this narrative" Alvesson and Robertson (2016, p.9). However, a long-standing, and, at first glance simple, question that continues to provide the focus of studies in identity is 'Who am I?', or put slightly differently, "Who I am", (Ashforth and Mael, 1989; Sveningesson and Alvesson, 2003; Brown, 2020). Gaining insight to possible answers to these questions is complex as many factors such as multiple positions and hybrid roles create boundary issues to be negotiated in identity construction.

The next section will explore identity in organisations as a source of identity

3.4 Identity in organisations

In this section I focus on identity in the management and organisation context to review literature to establish the conceptual framework for my research. The areas reviewed here include identity in organisations, identity at work and identity in work-related transitions. As already discussed, the scope, and sometimes vagueness, of the term identity tends to mean that it has become imbued with a certain degree of ambiguity (Alvesson and Svengingsson 2003), and with multiple meanings and interpretations especially as evident in empirical considerations (Alvesson and Gjerde, 2020). The broad field of management and organisational studies concerns itself with the activities and behaviour of people operating and managing within an organisational environment; and specifically includes an area of interest around how individuals in organisations create, and re-create their self-identity (Corlett et al., 2017; Knights and Clarke, 2017).

While 'identity' is the umbrella term for a wide field as noted above, 'identity work' has become the dominant concept which encapsulates the activity undertaken by an individual as they seek to create, or re-create, their own identity (Alvesson et al., 2008; Walsh and Gordon; 2008 Beech, 2011). An organisation is where an individual spends much of their time and where for many identity at work is undertaken (Sveningsson and Alvesson, 2003; Knapp, et al., 2013; Beech, et al., 2016; Caza, et al., 2018). However, not all identity creation takes place within a single organisation, thus the broader conception of 'identity in organisations' is relevant, (Pratt, et al., 2006; Watson, 2009; Ibarra and Barbulescu, 2010; McInnes and Corlett, 2012; Hay, 2014; Brown, 2015, 2020; Miscenko and Day, 2016; Atewologun, et al., 2017; Ybema, 2020).

Volunteer identity creation has been studied (Hitlin, 2003; Thoits, 2012, 2013, 2021), but, as discussed in the previous chapter, more research focus has been on motivation (Cnaan, et al., 1991; Clary, et al., 1998; Rhoden, et al., 2009; Nicols and Ralston, 2016; Aydinli, et al., 2016) using questionnaire approaches in which the richness and nuance of participant experience may be lost. This aspect of identity work is explored further in section 3.6.

The range and scope of issues in identity considered by scholars have expanded over time as interest in the field has grown. This expansion in the field has been considerable, Miscenko and Day (2016) calculated that the literature on identity and identification at work had increased by over 600% in the twenty years to 2016. Such expansion has been across a wide range of research interests as scholars have recognised identity as a field with the potential to add to the understanding of management and organisations. Expansion of this nature is not without some risks, as Miscenko and Day (2016, p.236) comment: "the current state of this literature to be disorganized at best". In his seminal review article, Brown (2015) suggests that attempts to understand and explain identity work and processes are such that they are best regarded as "in-progress projects that never be once-and-for-all satisfactorily completed" (Brown, 2015, p.33). Writing five years later, Brown (2020) proposes a "vast reservoir of ideas and theorizing has helped engender diverse contemporary identities research and turbo-charged it" (Brown, 2020, p.2), such that a broad group of scholars has an interest in identity research.

Whether the research of identity is marked by irreconcilable differences (Brown, 2020), becoming overly disciplined (McInnes and Corlett, (2020), having a surfeit of generalisations (Kuhn and Simpson, 2020), attempts to create organisation (Harding, 2020), or focusing on "understanding complementarities and points of synergy" (Caza, et al., 2018, p.890) it is clear the field encompasses many differing approaches. In endeavours to bring some order scholars have proposed structures, scaffolding or frameworks and to open opportunities for potential points of synergy between differing approaches (Rhodes and Brown, 2005; Brown, 2015, 2017, 2020; Miscenko and Day, 2016; Atewologun, et al. 2017; Corlett, et al., 2017; Caza, et al., 2018).

Table 3.3 below outlines important conceptual developments in identity research in organizations. The literature cited is but a small part of that on identity, choices were made to focus on the key literature related to my research which addresses the research question: "How do volunteers navigate the experience of becoming a manager in a safety-critical environment?"

TABLE 3.3 Theorising organisational identity

Key ideas	Key literature	See section/s:
• Organisational, social and individual levels. •From monolithic to multiple identity. •May be contradictory, unstable during change, self-identity deeper.	Sveningsson and Alvesson (2003)	3.4, 3.5.2, 3.6, 3.7
• Customisation, enriching existing identity, patching two identities together, temporary identity. •What the change is to, also what the change is from.	Pratt, et al. (2006)	3.5.1, 3.5.2, 3.7, 3.8, 3.9
• Positions organizational identification. • What? self-referential and from social group. •Why? people define themselves, navigate life via work, self-knowledge, self-continuity, self-distinctiveness, self-verification. • How? dynamic and turbulent. •Multiple, nested identities.	Ashforth, et al. (2008)	3.5.2
• Identity – fad, old wine in new bottles? • Functionalist, interpretivist, critical. • The why, what and when of identity research	Alvesson, et al., (2008)	3.5.1
• Tensions between work and other personas. • Context defines what it is to be a manager. • Multiplicity of discourses and social identities. • Types of social identity – social-category, formal-role, local-organizational, local-personal, cultural stereotype.	Watson (2008)	3.5.2, 3.6, 3.8
• Look at whole life of individual. • Narrative thinking varies. • Challenge identity to achieve change. • Narrative and identity as means not ends.	Watson (2009)	3.5.1
• Identity a slippery notion. • Challenges robust identity, is more fluid. • Introduces Strugglers, Surfers, Storytellers, Strategists, Stencils, Soldiers.	Alvesson (2010)	3.5.1, 3.5.2, 3.8
• Liminality when between identities, construction may be partial or incomplete, constituted by experimentation, reflection, recognition.	Beech (2011)	3.5.2
• 'What makes work-related identity positive?'; virtue, developmental, structural, agentic. • Complex and dynamic.	Dutton, et al. (2010)	3.5.2
• Narrative forms of claiming identity have not received sufficient attention. • Work-related transitions include promotions, transfers, occupational changes. • Transition requires authenticity, credibility, coherence, legitimacy. • Transition completed when conflicts and contradictions in narrative resolved.	Ibarra and Barbalescu (2010)	3.4, 3.5.2, 3.6, 3.7, 3.8

• Narrative research finds hidden patterns. • Narrative used in sensemaking, communication, learning/change, politics and power, identity and identification. • Community and culture reflected in narratives. • Multiple identities.	McInnes and Corlett (2012)	3.4, 3.6, 3.7
• Identity debates - chosen/ascribed, stable/fluid, coherent/fragmented, positive/or not/authentic	Brown (2015)	3.4, 3.5.2, 3.6, 3.8
• Non-resolution of part of identity?	Beech, et al. (2016)	3.4, 3.6, 3.8
• Proliferation of concepts adds insight; can create missed opportunities to see relationships. • Foci – manager, leader, follower, organization, occupation, profession, work, career.	Atewologun, et al. (2017)	3.4, 3.8
• Approaches – discursive, dramaturgical, symbolic, socio-cognitive, psychodynamic. • Identification follows from identity work.	Brown (2017)	3.4, 3.5, 3.6, 3.8
• 'Registers' of identity as theoretical frameworks – functionalist, interpretivist, critical, psychodynamic. • How to bridge registers -working round, above, back, together, through.	Corlett, et al. (2017)	3.8
• Identities based on socio-demographic, roles, personal attributes and group memberships. • Expand view of identity work, ongoing, tensions and transitions trigger more work, the intersection of the individual and the environment. • Cognitive, discursive, physical, behavioural.	Caza, et al. (2018)	3.4, 3.5, 3.6, 3.7, 3.8
• Influences include – self-discovery, quest for autonomy, change, freedom, declining security, boundaryless careers.	Brown (2020)	3.5, 3.6
• Liminality is 'betwixt and between'. • Sometimes conceived as a continual state.	Reed and Thomas (2020)	3.8, 3.9

Two key themes develop within the content of Table 3.3, defining organisational identity, and framing identity within the organisation and I shall discuss these further. The first is how might organizational identity be defined.

3.5 Themes in organisational identity

Table 3.3. above demonstrates some important theorising about organizational identity that has occurred over nearly two decades. It is a huge area and as Brown (2017) and Miscenko and Day (2016) have observed the field has grown rapidly in the past twenty years; to keep this review manageable I shall focus on the issues I consider most relevant to my research question. In a field where the approaches adopted by scholars can vary and there is still no clear definition of some topics, I shall put my preferred perspectives into focus.

3.5.1 Defining organisational identity

The construct of identity is perhaps made challenging by its very usefulness, as Albert et al. (2000:14) observe: "The beauty of identity and identification concepts is that they provide a way of accounting for the agency of human action within an organizational framework". The organisational framework is very wide providing scholars with the scope to cover a wide range of topics, with no consensus regarding what organisation identity and identification mean (Albert, et al., 2000). The following twenty years do not seem to have produced much greater clarity, Alvesson (2010) refers to the "slippery notion of identity" (p.194), Alvesson and Robertson (2016, p.8) refer to the "ambiguity and lack of consensus", Caza, et al. (2018, p.890) refer to "fragmented identity work research", and Brown (2020) observes that "'self-identity is a contested concept" (p.3). Arguing approaches to identity have changed from an undivided to a multiple perspective Sveningsson and Alvesson (2003) suggest identity is deeper and may become unstable during change. The notion of change is subjective and individuals will have different concepts of it as they engage in identity construction. Change is key to this thesis as it explores how individuals re-construct their identities when engaging with changing to a position with new responsibilities.

In attempting to define identity Albert, et al. (2000, p.13) proposed identity and identification as “root constructs”, viewing identity as a noun and identify as a verb, and noting that “some may be dismayed at the lack of consensus regarding the meaning and definition of *organizational identity and identification*” (p.13 italics in original). Suggesting that the value of identity and identification was to provide a way to understand human action in an organizational framework, Albert, et al. (2000) thought “identities situate the organization, group, person” (p.13). A different approach was adopted by Gioia, et al. (2000) who focused on the organisation itself, and proposed organisational identity was about the features that members of the organisation understood to distinguish the organisation from others, and acknowledged the relations between identity and other organisational factors.. Commenting on the fragmentation of research Watson (2009) suggested looking at narrative and identity were not ends in themselves but a means to achieve an end. The confusion was not helped, suggested Pratt and Foreman (2000), by having the “same terms (e.g. *organizational identity)* (italics in original) refer to different conceptual objects” (p.142). The creation of identity within the organisation may be facilitated by consideration of how conceptions of identity and work support each other incrementally rather than how they fit together (Pratt, et al., 2006).

Speculating whether the interest in studying identity was a fad, or old wine in new bottles Alvesson, et al. (2008), suggested studying identity from an approach questioning the why, what and when. Critically comparing the methods of functionalist – looking for cause and effect relationships, interpretivist – exploring how individuals craft their identities and critical – looking at power relationships, they invited researchers to "develop a sharper eye for the diverse and fine-tuned ways in which the personal-social relation might be configured" (Alvesson, et al., 2008, p.10). This thesis thus responds to such calls in exploring how individuals craft their identities during a time of change when engaging with new responsibilities.

In trying to move towards some clarity, Ashforth, et al. (2008) concurred with Albert, et al. (2000) that identity and identification are root constructs and suggested that in the construct of organisational identification "the individual and the organization coalesce" (Ashforth, et al. 2008 p.326). They conceptualised that individuals have both social identities and personal identities, and that individuals have multiple roles, as an employee and volunteer for example. The "focus of identification is as cognition ('I am A') and the high value it places on membership" (Ashforth, et al., p.328). Notably within this literature the idea of multiple roles is set in different domains; which sediments ideas about boundaries between these domains and the roles within them. In contrast this thesis explores multiple roles in the same domain – the volunteering environment.

With still no specific definition of organizational identification Brown (2017) proposed it as "an alignment between individual and collective identities" (p.299). This seems to take us to a position where a focus solely on the organisation itself can be discarded for the purpose of my research, and the focus shone on the individual's personal and social identity construction within an organisation, recognising that organisations are complex, and that an individual may be associated with more than one organization, and indeed, more than one role. As explored in the previous chapter, voluntary organisations with Trustees and volunteers can also be seen as diverse and complex (Hill and Stevens, 2011; Nordberg, 2019). Whilst this literature can be confusing and fragmented (Caza, et al., 2018) individuals undertaking identity construction within an organisation may also have fragmented perceptions of their own and the organisations identity particularly when they undertake multiple positions

. The next section examines how individuals frame identity within the organisation.

3.5.2 Framing identity within the organisation

In this section I shall consider approaches scholars have used as frameworks to study identity in organisations, starting with an approach proposed by Pratt, et al. (2006) that individuals are able to customise their identity adapting an existing identity as a work-related situation changes. Other approaches may be to patch two existing identities together to create a new one, or perhaps even adopting a temporary identity. Pratt, et al. (2006) noted these approaches being adopted when individuals were developing new skills during training and with the development of new skill engaged in the re-creation of their identity. Table 3.4. below illustrates the circumstances proposed to initiate identity work; which is discussed in further detail in this section.

TABLE 3.4 Circumstances that can initiate identity work

Key ideas	Key literature
Transitions:	Change (Sveningsson and Alvesson (2003), and development (Pratt et al. (2006), and career change (Ibarra (1999), Ibarra and Barbulescu (2010), and tensions (Caza, et al. (2018).
Temporary/fluid identity	Pratt, et al. (2006), Alvesson (2010), Ashforth, et al. (2008)
Liminal	Beech (2011), Reed and Thomas (2020)
Multiple	Sveningsson and Alvesson (2003), Watson (2008), McInnes and Corlett (2012),

Whilst table 3.4 shows the circumstances as separate categories they are to a degree related to one another as there is likely to be interactions between them in the working context. A transition may perhaps initiate identity work that may lead to the creation of a temporary identity, or for the individual to experience liminality in time or place (Sveningsson and Alvesson, 2003; Ashforth, et al., 2008; Beech, 2011). Multiple identities are addressed in section 3.7. In their study Ibarra and Barbulescu (2010) observed identity work occurs when uncertainty is created during a transition and involves re-creating an identity that has authenticity, credibility, coherence and legitimacy. It could be noted that issues such as these will occur during the creation of identity, although the authenticity of identities might be addressed along a 'real-fake' dichotomy (Tracy and Town, 2020).

That there is a need for more empirical investigation of transitions in the volunteering context noted by Toraldo, et al. (2019): "...examining volunteering work can reveal insights into contemporary labour transformations" (p.619). As the thesis progresses I explain further how this research responds to this and related calls.

Whilst Table 3.4 illustrated circumstances that can initiate identity work on the part of the individual the literature also considers how the re-construction of identity might be undertaken and analytically what underpins identity work. Table 3.5 below summarises some of the ways identity change may be addressed analytically to help understand what is taking place during identity re-construction.

TABLE 3.5 Identity change processes

Key ideas	Key literature
What is it? Why does it matter? How does it happen?	Ashforth, et al. (2008)
Conceptualisations – functionalist, interpretivist, critical. - social-category, formal-role, local-organizational, local-personal, cultural stereotype - strugglers, surfers, storytellers, strategists, stencils, soldiers. - discursive, dramaturgical, symbolic, socio-cognitive, psychodynamic - Functionalist, interpretivist, critical, psychodynamic - cognitive, discursive, physical, behavioural	 Alvesson, et al. (2008) Watson (2008) Alvesson (2010) Brown (2017) Corlett, et al. (2017) Caza, et al. (2018)

Addressing the question ‘why does it matter?’ Ashforth, et al. (2008) proposed that people define themselves and navigate life through self-knowledge, self-continuity, self-distinctiveness and self-verification, through a process viewed as dynamic and turbulent. Watson (2008) identified tensions between an individual’s work and other personas, and focusing on social identities suggested five types – social-category, formal-role, local-organisational, local-personal and cultural stereotype. What seems to be occurring is frameworks being created through categorisation, an approach noted in Chapter 2 in respect of volunteers. Taking the categorisation idea further Alvesson (2010) sought to go beyond a two-dimensional framework and proposed that those creating their identities could be classed as strugglers, surfers, storytellers, strategists, stencils, or soldiers with each of these having particular features identified. Whilst categorisations are useful in analysis of data the categories themselves are problematic and create limitations to how individuals may be seen in particular contexts. The categories are social constructions and broadly do not reflect context – given that identity construction and re-construction is highly contextual. Pointing out the need for more empirical work Brown (2015) noted identity as a "descriptive category rather than an analytic tool" (p.33) which highlights the need for more research exploring further understanding of identity and its ability to be utilised as an analytic tool.

In his seminal paper, Brown (2015) discussed whether identity is chosen by the individual or socially ascribed, whether identities are stable or fluid, whether they are unified or fragmentary, whether they are positive, in the sense of how they project the individual, or not, and whether they are authentic or not. The idea of these as key debates crystallises some of the earlier thinking (Ashforth and Mael, 1989; Ibarra, 1999; Albert, et al., 2000). These issues bring thought to bear on identity that continues to take it from something that might be considered intuitively fairly obvious to something that requires much deeper regard. Considering each of these key debates briefly, starting with whether they are individual or socially ascribed, reflects on whether an identity chosen by the individual using their agency, or might it be ascribed or allocated by others to the individual. Brown (2015) observes that "identities are neither simply chosen not merely allocated" (p.26). They arise through, amongst other things, organisational membership and are crafted by the individual. This may occur by the work of the individual only, or the organisation may seek to influence how the individuals constructs an identity (Thornborrow and Brown, 2000). This is discussed further in section 3.6.

Whether identities are stable or fluid might relate to organisational stability, with the instability, from the individuals perspective being felt in a local context or more widely across the whole organisation. This resonates with the idea of nested identities, in which the individual, for example, may within the same organisation have identities as an individual, a team member and a member of a department with which they are associated (Ashforth, et al., 2008; Down and Reveley 2009). However, whether identity is unified or fragmentary, is addressing the extent to which the individual perceives their identity as coherent over time. Transitions in the organisational environment tend to work against coherence initiating identity work in attempts to restore this sense (Caza, et al., 2018). Moreover, other conflicts such as professional versus organisational identities (Gilbert, et al., 2019) and between work and non-work identities (Ashforth, et al., 2008) further tend towards fragmentation, necessitating identity work to repair the identity in order to regain coherence. In this sense, identity work might seem as an ongoing effort towards coherence in the face of fragmentation.

Additionally, not all identities are equally valued. Identities that are usually characterized as positive are commonly defined as those that are valuable, good or beneficial (Dutton, et al., 2010) and “certain virtues and character strengths are inherently good” (p269) therefore generally associated with the writers’ ideas of positive characteristics. Challenging Dutton, et al. (2010), about what might be perceived as 'positive' work, about which they have few examples, Learmonth and Humphreys (2011) observe that "only about one percent of the worlds young people have access to higher education" (p.425) and that in the of characterising of a hospital cleaners job as not positive is setting the scholars perspective over that of the individual and ascribing identity. In addition to 'positive' work other conceptions include 'good' and 'bad' jobs (Adamson and Roper (2019) and 'dirty' jobs (Deery, et al., 2019). There are positions in the heritage sector that could be classed as 'dirty', the perception of which depends who is making the judgement. This highlights the risks of non-reflexive thinking when ascribing value to identity and the need for research in which the individuals' own identity narratives are placed centre stage.

A further debate emerges then as to whether an identity is authentic, or not, and the relation to whether one has an identity to be 'true' to (Ibarra, 1999). Brown (2015, p.30) notes "people have (or believe that they possess) authentic 'inner' selves", although the researcher can never know but assume that what the individual says the individual believes (Watson, 2009). This further highlights that identity within organisations is complex and subject to a range of challenges, be they from transition, changes in the workplace, the holding of multiple positions. Indeed, as I explore later, identity may be liminal as the individual works to re-create a new identity. The holding of multiple positions is discussed in section 3.7 and liminality in section 3.8. Overall, while conceptually these ideas around identity and identity work continue to evolve, there remains a need for in depth empirical work which allows for development through analytic consideration.

3.6 Identity work

Emerging from the conceptual debates explored so far, we can see that identity work can be understood as something we as individuals undertake more or less constantly as we consider and then construct and re-construct our own perspective of ‘the person I am’, (Watson, 2012, 2020; Alvesson and Robertson, 2016; Beech, et al., 2016; Ibarra and Petriglieri, 2010; McInnes and Corlett, 2012; Watson, 2009).

Identity here is defined as the qualities within an individual’s identity and identification sets those qualities as self-defining, thus an individual may identify themselves as a board director of a voluntary organisation whilst also volunteering in a different role for that organisation and identifying as being able to undertake activities of their own choice (Jacobs, 2017).

Overall then, identity work in the most general terms is what an individual does to construct their identity (Brown, 2020). This recognises the ongoing effort that is put in to that creation, which may be invisible or evidenced in some form of practical demonstration. Somewhat inevitably, given the range of views of scholars on other areas of identity, there is no one clear, commonly accepted definition of identity work Table 3.6 below summarises key conceptualisations of identity work.

Table 3.6. Key conceptualisations of identity work

Key ideas	Key literature
To provide meaning to their working life individuals reflexively engage in storytelling.	Rhodes and Brown (2005)
In occupations and organisations identity work comprises cognitive, discursive, physical and behavioural activities.	Caza, et al. (2018)
To answer questions around how to make life decisions and relate to others it is the meanings individuals reflexively attribute to themselves.	Brown (2015)
"The concept *identity work* refers to people being engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness" (p 1165)	Sveningsson and Alvesson (2003)
Within the social framework of their lives people attempt to create a coherent and personal self-identity.	Watson (2009)
The social framework and responsibilities impact on how the individual constructs self-identity and how that might be viewed.	McInnes and Corlett (2012)
Self-identity a contested term.	Brown (2020)
To influence how one is viewed by others the individual typically puts work into the outward facing elements.	Beech (2010)
The creation of self-identity through the stories told by the individual.	Ibarra and Barbalescu (2010)
Threats to identity and protection of it.	Ashforth, et al. (2020); Brown and Coupland (2015); Petriglieri (2011); Vough, et al. (2020)

A definition of identity work that is oft-cited, is that proposed by Svenningson and Alvesson (2003, p.1165): "*identity work* refers to people being engaged in forming, repairing, maintaining, strengthening or revising the constructions" (italics in original). This definition sets the potential scope of the process of identity work in that it makes it clear that it is not completed by the construction of a first identity. Identities are created, but then from the time of their creation require maintenance and adaptation to adjust to changed personal and social circumstances. It has been argued (Brown, 2020) that identity work is continual, in a state of flux highlighting the need for close empirical attention. Indeed, this call for detailed empirical work to generate "thick description" (Svenningson and Alvesson, 2003, p.1188) is a consistent theme across this topic.

Connecting to ideas explored in earlier sections of this chapter Watson (2008) highlights both internal and external aspects to be considered in identity work. such that occupational identification operates alongside internal personal identifications. Watson (2008, p.129) saw it as a process "in which people strive to shape a relatively coherent and distinctive notion of personal self-identity and struggle to come to terms with.....various social identities". A number of notions are coming together here, that of the interplay between social and personal identity, and that the creation of one is influenced by the creation of the other. The idea of identity work as a struggle (Svenningson and Alvesson 2003, Watson 2008), as tension (McInnes and Corlett, 2012), and effort (Beech 2011), are added to the process.   The notions of struggle and tension in identity work can be incorporated into the on-going process of identity construction and re-construction (Sveningson and Alvesson, 2003; Watson, 2008; Brown, 2015, 2017, 2020).

The idea that identity work might not always require great effort was proposed by Alvesson and Willmott (2002), suggesting "in stable or routinized life, the narrative of self-identity runs fairly smoothly" (p.626). This seems to rather depend on judgement as to where 'routinised life' is located. Alvesson and Robertson (2016) suggest that workers undertaking routine tasks do not often appear to incorporate their work into their identity, and that long careers in banking, for example, could be created with little effort put into identity work. From this one might conclude that identity work is most likely to be observed when events are causing individuals to focus on what they perceive to be significant changes or transitions (Ibarra 1999; Ibarra and Barbulescu, 2010) or identity politics (Clarke and Knights, 2020). However, Sheep, et al. (2017) observe the paradoxes involved in constructing identity such as tensions between stability and fluidity for example, where further empirical work can provide the opportunity to explore in under researched contexts such as volunteering.

Threats to identity involve the individual in identity work as they seek to manage the threat (Ashforth, et al., 2020); Brown and Coupland, 2015; Petriglieri (2011); Vough, et al., 2020). Scholars write of threats to an identity that may come from other individuals or groups (Petriglieri, 2011), from work or career changes (Brown and Coupland, 2015). The individual may respond with identity work against the threat for the protection of the identity (Petrigileri, 2011; Bataille and Vough, 2022). Rather than re-creating a threatened identity an individual may try to replace it or make it less salient (Bataille and Vough, 2022), or conceal it (Petrigilieri, 2011).

Attempting to deal with these apparent inconsistencies scholars have sought to find ways to analyse and classify the process of identity work. There remains still a lack of clarity around issues which Brown (2015) identified such as structure/agency, stability/fluidity, coherence/fragmentation in the creation of identity. These tensions impact upon the identity work of individuals as they address issues of stability vs fluidity in their own ways within a social setting. As before, a common theme emerging is the need for more empirical work in under examined contexts.

Moving to potential methods of analysis further Brown (2017) identified five approaches to identity work that he considered collectively "a distinctive perspective" (p.296) on identity and identification that scholars could use to inform their analyses. Here I expand on the brief references to these approaches in Table 3.5 where these approaches are identified. Table 3.7 summarises the approaches.

Table 3.7 Approaches to identity work (Adapted from Brown, 2017, p.301)

Approaches	**Overview**
Discursive	Situated practices of language use
Dramaturgical	Actions
Symbolic	Adoption, display and manipulation of symbols
Socio-cognitive	Cognitive mechanisms or through sensemaking
Psychodynamic	Unconscious ego defences

Taking each approach of Brown (2017) the discursive theorizes that through different *dialogical* process, both internally and externally focussed, and with others the individual creates their identity. Through enacting with the *dramaturgical* approach, which may involve showing emotion and physical attributes the individual may use performance to create the identity, whilst the *symbolic* approach is to make use of objects and bodily markings as they create their identity. And then the *socio-cognitive* approach involves identification via groups or other, and finally the *sociodynamic* approach may utilise fantasy for example to help create identity.

Continuing with this theme involving classification, in their important review paper Caza, et al. (2018) make a determined attempt to synthesise and develop an overarching framework that integrates the very large literature of identity work, noting yet again the fragmented nature of such work. Criticising the conceptual vagueness of identity work described as mental activity, performance based, linguistic, narrative or communicative (Caza, et al., 2018, p.891) propose four conceptual categories of identity work: cognitive, discursive, physical and behavioural. Proposing “not only do people do have multiple identities but they also have varying types of identities” (Caza, et al., 2018: 893) suggested identity categories of collective, role and personal, setting these within a conceptual framework of cognitive, discursive, physical, and behavioural, creating a matrix in which any individual might come to experience multiple identities, Further discussion of multiple identities follows in section 3.7.

These concepts proposed by Caza, et al. (2018) differ in some detail from those proposed by Brown (2017), and are *cognitive*, around mental activity; *discursive*, around conversations; *physical* relates to those actions people take to help create their identity. with the use of objects and the individual’s body, and *behavioural* focussed around those actions an individual takes in the construction of identity. Caza, et al. (2018) expressed the type of identity formation as *collective* in which the individual is part of a larger group, drawn from social identity theory and critical theory, or *role* based drawn from how the individual positions themselves with others taken from identity theory, or *personal* from attributes the individual sees as special to themselves. The boundaries are to some extent fluid an individual may inhabit a number of positions within the matrix at any one time (Brown 2017; Caza, et al., 2018).

Believing that identity research could benefit from the opportunity to be reviewed from a paradox perspective, Sheep, et al. (2017) suggest that identity work is a child of the tensions that exist around identity. Paradoxes are “contradictory yet interrelated elements that exist simultaneously and persist over time” (Smith and Lewis, 2011 p.382). Paradox has already been noted within identity construction, Brown (2015) identifying paradoxical positions such as coherence/fragmentation. Smith, et al. (2017) observe that using a paradox lens can help analysis by considering both “contradictory and interdependent aspects of competing demands” (p.2). Using their focus on paradox Sheep, et al. (2017) propose four paradoxes of identity, shown in Table 3.8 in tabular form.

Table 3.8 Four paradoxes of self-identity creation based on Sheep, et al. (2017)

1	Characteristics of identity (stable?) vs the process of creating that identity (fluid?).
2	The possibility of an individual having similar identity characteristics as another, yet within those characteristics be different.
3	A period of time when the past and the future are in tension as transitions take time.
4	A strong pull in one direction may be countered by a strong pull in the opposite direction, creating a state of flux.

The lens of paradox can be used as part of the analysis of volunteers managing other volunteers adding depth to the analysis as volunteers may be subject to a range of paradoxical positions and have options to seek to resolve them not available in usual circumstances to paid employees – simply walking away with no personal financial risk for example. In similar way as Brown (2020), and Caza, et al. (2018), tensions and overlaps between concepts, lenses and theories are identified by Sheep, et al. (2017).

Drawing this section on identity work to a close, it appears there still is little consistency in the variety of analytical tools proposed yet many intriguing avenues for exploration. It remains the judgement of the individual researcher to follow the theorising that aligns best with their research and matches their methodological preferences. The next section expands discussion on multiple identities.

3.7 Multiple identities

Adding further complexity when researching identities in organisations, is that the individual and their identity are not necessarily located in just one place within the organisation. Identities may be related to the job, work group, department, division, or the whole organisation. Sveningsson and Alvesson (2003) noted that there was a trend away from seeing self-identity as monolithic to multiple identities, whilst Watson, (2008) and Caza, et al. (2018) argued there are a multiplicity of discourses and social identities available to engage with in the construction of identity. Identities can be created through narrative (I say more on this important concept in Chapter 5) from which the researcher explores patterns and through which the individual may have been assisted in the creation of multiple self-identities (McInnes and Corlett, 2012). Whilst there has been some research into multiple identities, Ramarajan (2014) identifies three reasons that the relative lack of research was surprising. Firstly, because conceptualising multiple identities is not a new idea, secondly because of trends such as globalisation and new communication technologies, and thirdly that a single identity can play a part in shaping other identities, (Ramarajan, 2014). Despite the pleas for more research, Pratt (2020) whilst observing an individual may have multiple identities, and having “long argued for the importance of looking at multiple identities” (p.889), notes that still there has not been very much research looking holistically at multiple identities. This provides an important premise for the research pursued in this thesis in which the volunteer and manager are both relevant identities.

Ashcroft, et al. (2008) suggest some multiple identities might be described as nested identities, as one might imagine from the job level through to the organization level nested inside one other. This idea of nesting could be taken further with identities that cross jobs, work groups, and departments such as may be found with volunteers in voluntary organizations, for example, so an individual might have a number of situated nested identities in play simultaneously. In research undertaken very unusually in the voluntary sector, Meisenbach and Kramer (2014) studied nested identity in a voluntary choir and the nesting from least important was the choir, singing, music and family – with here the choir (the organisation) being lowest in the nesting. However, conceptually nesting introduces notions of hierarchy that need careful consideration in relation to individual experience. It is important to avoid assuming the relative importance of identities simply by association with a different organisational level for example. Moreover, this could confound identity construction should an individual have different positions at different hierarchical levels within the organisation.   There remain calls for further research on this topic in order to develop more sophisticated theorisations across different contexts (Pratt, 2020). In particular Bresnen, et al. (2019, p.1342) suggest consideration of “countervailing pressures” is required. This might involve for example the conflicting pressures experienced by a volunteer holding multiple positions.

Issues with multiple identities thus further bring the issues of boundaries into focus. Boundaries have been explored by MacLean and Webber (2015) who discussed the degree of permeability between boundaries with some being permeable, some semipermeable and some impermeable and the ensuing impact upon identity work. Taylor (2004) explored the boundaries between paid work and unpaid work, private and public activities and formal and informal activities. The individuals' social contexts may create boundaries at for example national or organisational levels, and in their identity work individuals might stretch or dissolve a boundary (Caza, et al., 2018).

Threats may draw attention to boundaries and perhaps magnify them drawing attention to the need for the re-construction of an individuals' social identities (Korshcun, 2015). For an individual taking on new a role might be a challenge if the path between the roles is not obvious causing the individual to create boundaries between them (Wittman, 2019). That boundaries are complex, not always simple to cross, if indeed crossing is relevant as an individual may require multiple conceptions of a single boundary to re-construct their identity.

A related notion is that of hybrid identity in which the individual is situated within (usually) two related spheres, typically, the professional and organisational or managerial. A professional has obligations to society as say a lawyer, a teacher, a doctor, in respect of codes of professional conduct, and an area of researched interest has been in the medical profession (Currie and Logan, 2017; Bresnen, et al., 2019, McGivern, et al., 2015).

More generally as individuals enter positions where they experience potentially conflicting aims they engage in identity work that helps them bridge the two spheres (Ibarra, 1999, Ibarra and Barbulescu 2010, Pratt, et al., 2006). Often it is the organisation that initiates situations in which the individual has to accommodate hybrid roles. Martin, et al. (2017) noted individuals experiencing tensions, conflicts and resistance to hybridity with some individuals seeking resolution by defining identity by what they were not. Another approach noted by Spyridondis, et al. (2015) was of individuals putting identities into order of salience reflecting the Meisenbach and Kramer (2014) concept of nesting but avoiding hierarchal assumptions. Research into hybrid roles (Martin, et al., 2017; Bresnen, et al., 2019) has explored individuals put into that situation by the organisation in their paid employment, whilst the less researched circumstances of volunteers are different in that should they hold hybrid positions they are in those positions by their own choice. Despite extensive work in this area, the notion of hybridity requires further development to examine empirical examples in more diverse contexts, including as considered here, voluntary organisations. This will enable theoretical development and offer the potential to generate nuanced insights.

3.8 Liminal identities

There may be times for an individual when identity construction or re-construction is difficult, where the move to a new identity is not immediately clear, where there may be ambiguity or the new identity requires more work to construct. Such situations may be described as being liminal, when an identity is neither one thing nor another (Beech, 2011). Whether identities are stable or fluid and therefore sometimes potentially liminal is of concern because it has been suggested that individuals seek stable self-identities (Ashforth and Kreiner, 1999; Brown, 2015, 2017).

Using their notion of registers of identity Corlett, et al. (2017) identify a divide in approaches towards identity between stable and fluid, with stable identities being fixed, and secure and coherent, whilst fluid identities are dynamic, temporary, negotiable, insecure. At the individual level this is becomes even more nuanced with a complex mix of some elements of identity being stable and some fluid, as interactions with other individuals, organisations, and within society bring about changes. Identities highlighted by Corlett, et al. (2017) such as temporary and insecure may put individuals into a state of permanent liminality, as re-creating identity when leaving behind old structures and positions is insecure (Winkler and Kristensen, 2021). This further highlights the complexity of liminality which can be multifaceted. Perhaps Sveningsson and Alvesson (2003) were speculating about instability generally when they suggest trends indicating identity have moved away from monolithic to multiple, as they specifically note that "(I)n a turbulent and multifaceted world, identity becomes destabilized" (p.1167). Although it is notable that, despite the importance of the sector, this has not been much considered in relation to volunteering but rather researched in more high-profile sectors and careers.

An identity may be liminal for a variety of reasons, lack of stability (Pratt, et al. 2006), conflicts and contradictions (Ibarra and Barbulescu (2010), fluidity (Alvesson, 2010), and non-resolution of a part of identity (Beech, et al., 2016).

There may be periods when an identity cannot be re-created for a while, when an individual is in a liminal state an in between position where there is neither one thing nor another, (Beech 2011; Ibarra and Obadaru, 2016; Reed and Thomas, 2019; Gordon, et al., 2020). This situation has been proposed as occurring during career transitions where the individual has to establish expectations in the new position whilst leaving a previous position, or taking up a first work position (Ibarra,1999). Gordon, et al. (2020) observe that the individual is moving from a known position to something less well known and the 'who am I?' question requires time to address. Liminality in management and organizational studies is examined by Soderlund and Borg (2018) who identify three liminal themes – process, position and place. In the theme of position key issues identified are relating to dual positions and to that of having a liminal persona (Soderlund and Borg, 2018). These are issues are relevant to my research and I consider them further in Chapter 9.

Relevant to the research for this thesis one situation where liminality may be observed is that of the move into retirement (Ibarra and Obodaro 2016) where people may quit a familiar position without being sure of the future position. The liminal state can be where an individual has the opportunity to 'play' with the creation of the new identity in the sense that ideas and approaches can be experimented with, and if necessary rejected in favour of other approaches (Ibarra and Obodaru, 2016; Ibarra and Petriglieri, 2010). In their work looking at retirees Bordia, et al. (2020) observed retirees taking "creative, adaptive, proactive" (p.13) actions in their transitions from full-time paid work.

Reviewing retirees transitions from one employer to another (paid) employer Sullivan and Al Ariss (2019) noted research on identity and activity after retirement is lacking. A further relevant issue regarding retirement is the concept of lingering identities, in that just because an individual has ceased to work at a particular task or in a particular

position, or for a particular organisation the memory of that is not erased, and transitioning identities can hold past elements long after the change has occurred (Wittman, 2019; Reitzes and Mutran, 2006). How this is implicated in understandings of liminality is yet to be explored fully in a range of empirical contexts
such as volunteering which this thesis explores.   This ”betwixt and between” (Beech, 2011, p.286) position is germane to the research for this thesis, and will be discussed further in Chapter 9. The next section will examine aspects of socio-materiality and identity considering issues relevant to this research where technology, and identity and heritage meet.

3.9 Identity and socio-materiality

Identity at first glance seems a relatively simple idea to grasp – it is fixed within the human domain as Locke (1690) proposed, although even in the twenty-first century cars, ships and other inanimate objects are sometimes considered to have an identity. Locomotives at heritage railways, for example, are frequently addressed as ‘she’ and often given personal characteristics. Referring to an inanimate object, Clinker (1945) suggests it might say: “I’m glad to see you here again....”. He is in fact referring to a railway station asserting: “To the discerning, stations have a personality, every one as different as human beings from one another” (p.220)!

Socio-materiality was not an issue I had intended to include in this thesis, indeed it was not a concept that had got very far over my personal horizon. It was brought to me by some of my participants who had a particular sense of identity about the steam locomotive footplate, ‘a magical place to be’. In organisational studies Orlikowski

(2007) suggests materiality is something “traditionally overlooked” (p.1435) and considers how this might be addressed, writing “[M]ateriality is not an incidental or intermittent aspect of organizational life: it is integral to it” (p.1436). Materiality is under-researched in the voluntary heritage sector where heritage artefacts represent the rationale for an organisations existence whilst those engaged in volunteering experience boundaries between old and new technology.

Orlikowski (2007) suggests that there is something of a binary divide in the literature with a techno-centric approach looking at how technology impacts on human actions, and a human-centred approach which seeks to understand how humans interact with the technology, and argues the human-centred approach tends to reduce the part technology might play. These two approaches, used independently are limiting, and (Orlikowski (2007) suggests the social and material are more usually found in combination and enacted.   Current research in the socio-materiality field typically looks at 21st century technology – smartphones, laptops, other electronic technologies (Orlilowski, 2007; Symon and Pritchard, 2015) whilst Valand and Georg (2014) looked at socio-materiality from an organisational change perspective as individuals were involved in re-designing their office space following a merger.

Drawing on work that was not expressed as socio-materiality but is relevant, through the material lens Gioia, et al. (2000) suggest adaptability in visual representations of a corporate image with for example the railway having an image it wishes to project. This might be linked to the organisation seeking to influence identity in dress, and how volunteers present themselves. Pratt and Raefeli (1997) discussed the conflicts of how social identity might be viewed by individuals when required to wear organisational dress (uniform) and how individual identities might vary between those wearing the same dress. How much value an individual places on dress in respect of self-identity was explored by Kang (2011), looking at how young men's work identity salience and the importance they placed on work dress.

Pride in materials provided by the organisation to rural fire service volunteers in New South Wales, Australia, was noted by Baxter-Tomkins (2011) observing "volunteers frequently told of pride in their uniforms, the vehicles and their equipment and these made them feel more professional." (p.221-222). There may be conflict between the identity the organisation, a socially constructed entity, and the identities created by those in a particular work place setting up tensions in identity construction. My interest in this work has therefore developed through my research journey, as I explore later in the thesis.

3.10 Review of empirical studies

This section will consider key empirical studies undertaken to explore the construction of identity that relate to the focus on my thesis. The selection of empirical studies identified in Table 3.9 are those that I consider related to my research question "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment". In the previous sections literature relating to identity work, multiple identities and liminality has been considered. Most empirical work has been in the paid employment context, and there is a lack of empirical research in the voluntary sector which requires addressing.

From the empirical studies I have identified four areas of focus: volunteering, managing, transitions and location, and my decision into which theme to set individual examples has been made more challenging by interrelationships between them. Identity has been described by Pratt, et al. (2016) as a "*nexus concept*" (p.4) linking things together and this is both one of the challenges and one of the opportunities presented in studying identity.

TABLE 3.9 Examples empirical studies

Focus	**Key ideas**	**Key literature**
Volunteering	The stronger an individual identifies themselves as a blood donor, the more likely they are to donate blood.	Callero (1985)
	Volunteering in retirement to replace identity lost from working.	Cousineau and Misener (2019)
	Some retirees gave themselves new identities to give themselves purpose, activity and meaning in retired life.	Bordia, et al. (2020)
	Role identity work of mid-life and retired volunteers. Association between age and identity. Retirees compensate giving more importance to volunteer identity.	Van Ingen and Wilson (2017)
Managing	Managerial identity work. One senior manager. Role expectations and identity struggle.	Sveningson and Alvesson (2003)
	Managerial identity, case studies, outward looking, specific detail	Watson (2008)
	Front line managers dealing with change and doing identity work to deal with disruptive events.	Down and Reveley (2009)
	Aer Lingus cabin crew. Service levels degraded by management. Loss of identity as provider of quality service.	Curley and Royle (2013)
	New manager's attempts to generate a workable self-identity of how one ought be as a manager, creates dissonance, generates anxiety, frustration and worry.	Hay (2014)

Transitions	New entrants to professional service organisations. Create provisional selves.	Ibarra (1999)
	Military leavers. Strong identity with the military (military 'me'). Adjustment problems related to new settings. Loss of camaraderie.	Grimell (2018)
Location	Place identity – dwelling, community, region	Cuba and Hummon (1993)
	Staff identifying with location – state> work location	Scott (1997)
	Identity, ties to local community	Baxter-Tomkins (2011)
	Identity, community, kinship. Perilous and thick volunteering	O'Toole (2013) O'Toole and Grey (2016)

3.10.1 Volunteering

Chapter 2 explored volunteers and volunteering and considered differences and similarities that have been found in paid work experience and that of voluntary activity. There are some empirical studies which have looked at the volunteer context. In an early study linking both identity and volunteers, Callero (1985), found that amongst blood donors those who had higher role-identity salience were more likely to identify themselves as regular blood donors, and were more likely to donate blood. Whilst blood donor identity was of lesser importance in self-identity than other factors such as identities relating to occupation and religion to be motivated to give blood required the salience of blood donation. Voluntarily donating blood does not meet many of the expectations of active involvement in volunteering (Clary, et al., 1996, 1998; Ferriera et al., 2012, Smith et al., 2020) but from the perspective of volunteering, Callero (1985) found the salience of the volunteer activity needs to be high for the volunteer to continue with the activity, and identity is fluid and depends upon the salience afforded to the activity.

Addressing retirees in volunteering situations Cousineau and Misener (2019) and Bordia, et al. (2020), considered the retirees' replacement of lost identity and the creation of new identities to provide meaning in their lives. Cousineau and Meisener (2019) focus on ageing and health issues, and Bordia, et al. (2020) considered the retention of pre-retirement identity and transitions. The work of van Ingen and Wilson (2017) suggests those becoming volunteers at retirement are more likely to identify with the role of volunteer, they also suggest that more research is required to understand the implications of different pathways to retirement. This point is explored further in Chapter 9. These studies look at transition and searching for new purpose including at retirement although there are also individuals who do have meaning and purpose and are looking for the opportunity to use them whilst still in employment but research is lacking. The next section looks at empirical studies of those with management responsibilities, all relate to those in paid employment, there is a lack which this thesis addresses of those volunteers who manage others.

3.10.2 Managing

The empirical studies in this section focus on those in paid employment, with a gap in studies of those volunteers who manage in the voluntary sector. In seeking to challenge some prior thinking, Hay (2014 p 509) noted "a sanitised perspective, which avoids the lived experience of managers." Whilst not clarifying her methodology, and using discourse as a tool, she sought to explore the lived experience of managers who had completed an MBA. Hay (2014) drew from Sveningson and Alvesson (2003) who observed the developing of a "grandiose discourse on management." (p.1187), they also noted, although Hay (2014) did not, a need for “thick description” (p.1188) in understanding the importance of identity work. With the aim of seeking to understand the challenges managers face in their identity work (Hay, 2014) identified a number of issues such as, living up to expectations, “I don’t know what I am doing!” (p.515). In summary, Hay (2014) suggests identity work for a manager is limited by social identity opportunities and it is not an easy process. Social identity and its link to identity was studied by Watson (2008) who envisaged an outward facing and an inward facing approach in identity work. Whilst this is proposed for managers in paid employment, it is not unlikely the situation of unpaid managers of volunteers might be rather similar, an area under-researched but explored in this thesis.

Using a different focus Down and Revelly (2009) in their research, from a critical perspective, looked at an existing first-line supervisor with an already-established identity as he transitioned to a ‘manager’ in a situation of organisational change and instability. Rather interestingly, the research project Down and Revelly (2009) undertook was considered by them to “use rarely combined observational and narrative-biographical methods” (p.380). A finding from their research was that “confirming one’s identity by displaying oneself in front of others is central to identity formation” Down and Revelly (2009: p.398). The opportunity to confirm one’s identity through others and thus seeking confirmation of acceptance might be also seen as threatening (Ashforth et al., 2020); Brown and Coupland, 2015; Petriglieri (2011); Vough, et al., 2020); volunteers may experience similar opportunities and face threats. There remains a need for more empirical work exploring volunteer first-line supervisors and managers and their identity construction during transitions.

A rather different situation is explored by Curley and Royle (2013) in which the employer, in this case the airline Aer Lingus, changed the style of service offered to passengers on their aircraft from a traditional 'full-service' proposition to a low-cost model. The cabin crew who had provided the full-service model felt their job and status were being eroded and their self-identities were conflicted as they attempted to create a new self-identity that many of them did not want. Curley and Royle (2013 p.118) note "the EL [emotional labour] of cabin crew jobs has been 'downgraded' by management, yet despite this some long-serving cabin crew still try to maintain a high level of EL performance...". This is an example in which those long-serving cabin crew hold on to lingering identities (Reitzes and Mutran, 2006; Wittman, 2019), even though they have not left their job or employer and the transition is within the framework of their current job. The retention of lingering identities within changing circumstances in the paid work environment was seen to create changed perceptions of familiar tasks that the individuals did not relate to. This is something from the paid environment that can be usefully explored in the volunteer environment as the unpaid position allows the individual other ways the re-create an identity, or even to choose not to do so and remain in a liminal situation.

3.10.3. Transitions

The key study by Ibarra (1999) looked at transitions and how individuals experimented with provisional selves as they sought to create a new identity as new MBAs sought to turn themselves into investment bankers or management consultants. Individuals developed provisional selves by role modelling, experimenting with and evaluating provisional selves. Identities were in transition, with a measure of 'in between' and some liminality, as they sought to re-create their identity. The creation of provisional identities has challenges for the individual and will be influenced by who they might model themselves upon and the experiences they have – good and bad. There could be threats to identity within provisional identities as learning by portraying new identities (Watson, 2008) may not be met with success. In the voluntary environment there may be additional challenges in that the individual may not have clarity about where the transition may be taking them.

In looking at identity issues of the military-civilian transition Grimmell (2018) identified some key issues: the asymmetry between the two positions with the military-veteran self-identity, initially at least, remaining the dominant; issues of adapting to a new environment; the loss of the military ‘family’, and adapting to civilian life which takes time. The individual thus has a number of tensions with lingering identity (Reitzes and Mutran, 2006; Wittman, 2019), and the ‘betwixt and between’ issue of liminality (Beech 2011; Ibarra and Obodaru, 2016; Reed and Thomas, 2019; Gordon, et al., 2020). The transition from specialist to manager (Roberts and Biddle, 1994) in paid employment is shown to be difficult. Transitions from the paid working environment to the volunteer environment are explored in my research.

In a study linking volunteering with retiring Cousinou and Misener (2019) looked at how older people in retirement handled the re-construction of their identity. Awareness of the transition to retirement resulted in changes and the loss of previous identity, with voluntary activities creating an opportunity to develop a new identity, although some participants sought voluntary work similar to their previous paid employment. Whilst the transition to retirement is not infrequently presented as a happy move to a new life “the reality of transition is that transition is much more complex.” Cousinou and Misener (2019 p.72). Transitions within and from paid employment situations are challenging and difficult (Cousineau and Misener, 2019), with identity re-construction becoming necessary to operate in the new environment. There are also transitions which have perhaps less risk whilst within the same organisation in the volunteering situation and this research examines such transitions.

3.10.4 Location

The physical location in which an individual does paid work or volunteers is a factor in the construction of identity which can be expressed in terms of macro through to micro environments. Studying place identity Cuba and Humman (1993) noted that “Nearly all respondents expressed some sense of belonging ... - dwelling, community and region – contributed substantially....” (p.126). The sense of place in identity work might be driven by an individuals’ perceptions of an environment not necessarily obviously following a demographic or pragmatic direction (Hopkins and Dixon, 2006) and supplemented by responses to issues of social identity (Tajfel and Taylor, 1979). Identification, and multiple identity, was explored by Scott (1997) in a study of paid employees in an off-campus educational organisation that operated at a number of geographical locations. He hypothesised the departmental structure of the organisation “makes multiple identifications possible” and that to cooperate there “was a need for close relations between all levels of the organization” Scott (1997, p.498). Whilst there was some identification of individuals between the locations they related mainly to occupation and level in the organisational structure, with those who had been in the organisation for longer identifying with more parts of the organisation, whilst those with shorter tenure identified with their own local location (Scott 1997).

In her study of volunteers within the Royal National Lifeboat Institution, O'Toole (2013) noted that in respect of identity there was a "peculiar mix of locality, kinship, community...." (p.182), and observed the importance of the location to "integration within the group" (p.192). However, here this refers to the co-location of living and volunteering. This deep commitment to the local community (O'Toole, 2013; O'Toole and Grey, 2016) is also observed by Baxter-Tomkins (2011) in his research into volunteer fire-fighters in New South Wales Australia who "report their ties and commitment to their local community" (p.221). These research projects illustrate the complex ways in which place, at a local, community level, is implicated in identity construction. Moreover, this thesis highlights heritage as an ongoing connection that is continually re-embedded within identity work, offering a useful prompt for consideration of identity in volunteering which is often linked either physically or experientially to a place.

This section has explored empirical research in identity that provides an underpinning to my research showing the themes are complex and woven together with interrelationships.

3.11 Identity literature: conclusions

This chapter has reviewed some identity literature, however, with the great growth of the literature on identity and identification it has been necessary to focus on what is relevant to my research question.

The chapter has covered the antecedents of identity scholarship and social identity theory (Tajfel and Turner 1979). A key focus was identity in organisations which is something of an umbrella term, sometimes ambiguous (Alvesson and Sveningsson 2003). Many of the studies into identity in organisations have focused on the paid work environment.

Key issues in identity in organisations for the purposes of my research are transitions (Sveningsson and Alvesson, 2003; Pratt, et al., 2006; Caza, et al., 2018), temporary and fluid identities (Pratt et al., 2006; Ashforth et al., 2008), liminal identities (Beech, 2010; Reed and Thomas, 2020) and multiple and hybrid identities (Sveningsson and Alvesson, 2003; Watson, 2008; Bresnen, et al., 2019). Identity work, the work undertaken to construct or re-construct identity was explored (Beech, 2010; Caza, et al., 2018) and in issues relating to threats to identity and its protection (Brown and Coupland, 2015; Ashforth, et al., 2020; Vough, et al., 2020).

Relevant empirical studies were also examined on volunteering (Cousineau and Meisner, 2019; Bordia, et al., 2020), on managing (Watson, 2008; Down and Reveley, 2009; Hay, 2014), on transitions (Ibarra, 2009; Grimmell, 2018), and on location (Cuba and Hummon, 1993; Baxter-Tompkins, 2011; O'Toole, 2013; O'Toole and Grey, 2016). Issues of socio-materiality were explored, of objects, dress and technology within the social environment (Pratt and Raefeli, 1997; Orlikowski, 2007; Symon and Pritchard, 2015). What I sought to achieve in this review was a funnelling effect from the big picture of identity through to some particular aspects of the identity of individuals pertinent to my study, and within the tensions, complexities, paradoxes that individuals may experience in constructing and re-constructing their identity

Here I amplify on the comment in Section 2.5 of the importance of issues of identity to add insight to understandings of volunteering. I explore a key issue which has impact on identity construction - that of boundaries and boundary crossing. Individuals cross many different boundaries during the course of life, for example, between paid work and volunteering, or between different working activities in the same organisation. Boundaries create complexities in volunteering activities, for example a volunteer as a member of a workgroup whilst also managing that workgroup. and in the identity work required by a volunteer when experiencing a boundary or even multiple boundaries. Table 3.10 below summarises boundaries, issues and tensions that have been reviewed in this chapter, setting out the current gaps and their relevance to the research questions explored in this thesis. There is a need for further empirical and theoretical work to explore the interconnections between volunteering and identity.

Table 3.10 Boundaries as a source of identity tensions

Boundaries	Source of boundary issues and tensions	Key concerns identified from literature review	Issues/Theoretical gaps	Relevance to this thesis
Boundaries generally	E.g. between units, sub-units; organisation and individual identities.. (Tushman and Scanlon, 1981; Taylor, 2004;	Existence of boundaries creates need for complex identity work. Boundaries may be permeable, sometimes impermeable.	Most research has been conducted in the paid work context, little research considers the volunteer context.	This thesis offers insights to the theorising of the management of boundaries and identity work by volunteers as they navigate the experience of

	MacLean and Webber, 2015) Identity work is complex (Orlikowski, 2007).	Tensions may be experienced at boundaries.		becoming managers.
Liminal boundaries	Liminal (Sveningsson and Alvesson, 2003; Ashforth, et al. 2008; Beech, 2011; Hayes, 2010; Winkler, 2019; Ibarra and Obarduru 2020).	Liminality between positions, when holding multiple positions. May be in a situation of “permanent liminality” (Winkler and Kristensen, 2021)	Managing multiple positions within and outside the organisation, mostly considered from the paid employment perspective.	Contributing insights to volunteer experiences of liminality as they transition across boundaries this thesis enhances volunteering theory.
Material boundaries	Studies of materiality (Dale, 2007; Orlikowski 2007; Symon and Pritchard, 2015; Valand and Georg 2018). New technology vs old technology: (Orlikowski, 2007). Dress: (Pratt and Rafaeli, 1997; Kang, et al., 2011; Shefer, et al., 2018) .	Materiality can create or remove boundaries.	“Traditionally overlooked”, Orlikowski 2007. Theoretically under-researched in a volunteering context.	Within the field of volunteering this thesis makes an important contribution to theories of materiality and identity in this under-researched area.
Transitions at boundaries	Requires flexibility in approach (Sheep, et al., 2017; Soderlund and Borg 2018; Sullivan and Al Ariss 2019).	Volunteers need to be flexible to manage overlapping interfaces between identities	Issues of theorising about volunteer transition management is required. Lack of research relating to identity work by volunteers at interfaces between boundaries.	This thesis provides input to volunteering theory adding nuance to understandings of how volunteers navigate the complex identity

				transitions required at multiple boundaries.

This review provides a focused view, working from the broad identity literature and then honing in on the specific theoretical aspects that are pertinent to my research questions. That is to say, my research questions are concerned with the boundaries, tensions and complexities that individuals may experience as identity issues in navigating themselves along routes to becoming managers, and then as managers in a complex safety-critical environment.

Moreover, in the field of identity much research has focused on those in paid employment whilst little work has been undertaken on volunteers. Such work that has been undertaken has addressed young volunteers (Gronlund 2011). conflict between volunteer and managerial identities (Kreutzer and Jager 2011), lifeboat volunteers (O'Toole (2013), and the identity salience of hospital visitors (Thoits 2013). Utilising a social constructionist paradigm with an identity lens this thesis focuses on the identity work of volunteers in a safety-critical environment at boundaries, boundary transitions and within different groups and roles as they navigate their way to becoming managers. As already highlighted in relation to the discussion of the volunteering literature, the issue of boundaries is a recurring theme relevant to this thesis. As outlined in Table 3.10 boundaries are found with different conceptualisations – within organisations (MacLean and Webber, 2015). The boundaries themselves may be conceptualised as fluid (Brown, 2017, Caza, et al., 2018), permeable (MacLean and Webber, 2015), liminal (Beech, 2011; Ibarra and Obarduru 2020), material (Gioia, et al., 2000; Orlikowsi, 2007, 2010). Furthermore, at the intersections of boundaries individuals need to undertake identity work as they manage their transitions (Sheep, et al., 2017; Soderland and Borg 2018).

Theorisations of boundary crossing have mostly been developed from research into individuals in paid employment. Boundary theory offers insights into the complexity that exists in boundary crossing (Korschun, 2015; Caza, et al., 2018; Pratt, 2020). However, there is little theorisation on the identity work at boundary crossings by volunteers. A rare example of theorisation considering volunteering explores boundaries between the public and private sectors and identity work at boundaries between work and non-work (Taylor, 2004) but there remains a significant gap to be filled.   This thesis offers new and important insights and challenges into theories of volunteering and identity, addressing this under-researched area at the interface of the concepts. Utilising the identity lens it focuses on the identity work of volunteers at boundaries, boundary transitions (Taylor, 2004; Beech, 2011; Kang, et al., 2011).

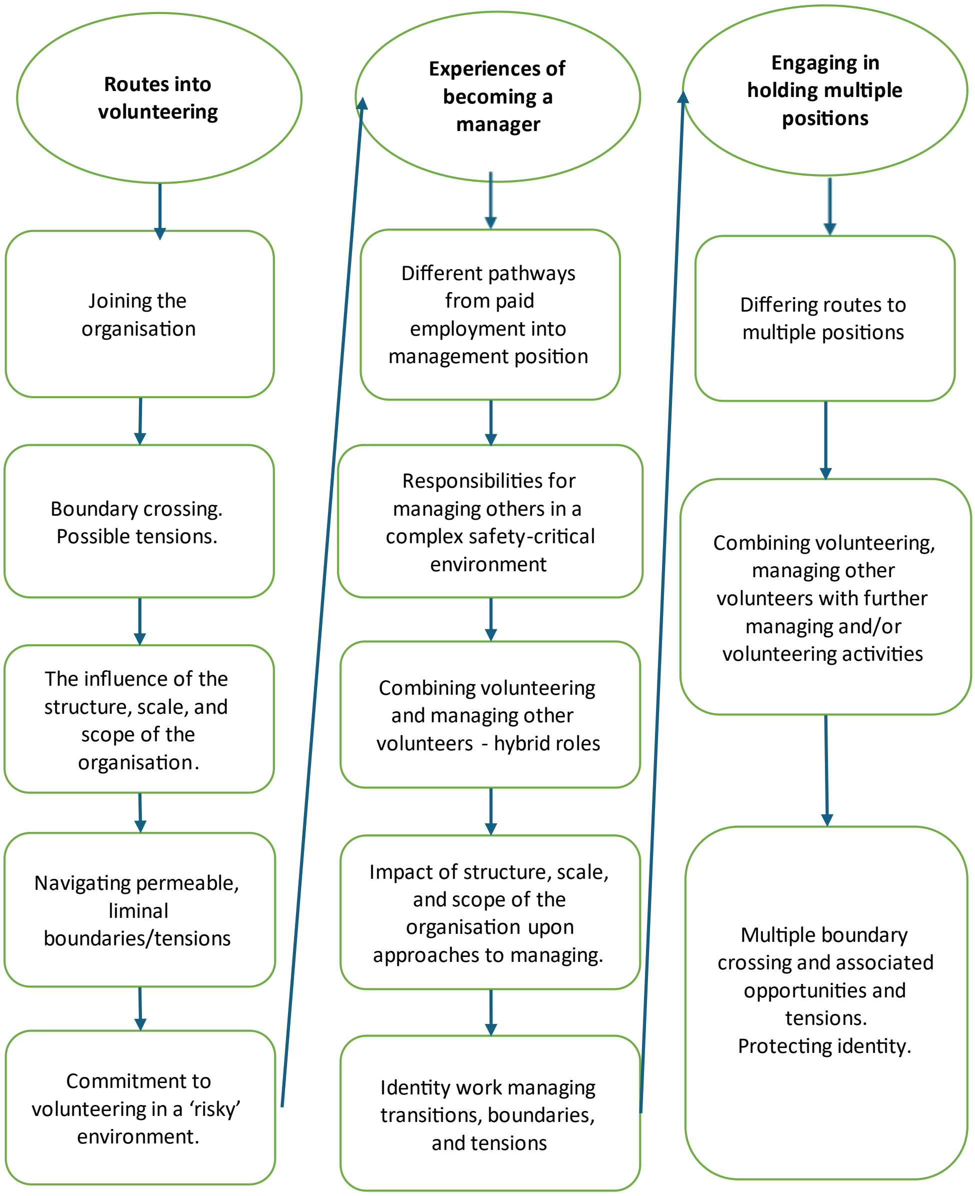
In this section I have considered the impacts and issues of boundaries on identity and identity work including differing kinds of boundaries such as permeable, liminal, material. They are not mutually exclusive and which entail significant identity work from a volunteer as transitions across boundaries are made. The next section will draw from the literatures of volunteering and identity to develop a theoretical ‘route map’ to aid the reader through the thesis.

3.12 Drawing together volunteers, identity and managing and a roadmap through the thesis

This thesis brings together volunteers, issues of identity and the narrated experiences of volunteers who manage other volunteers. Volunteering and volunteers, as discussed in Chapter 2, are both under-researched and under-theorised. Within volunteering matters of policy and organisation receive considerable attention, whilst helping paid managers manage volunteers is also much discussed. However, as outlined earlier in this chapter there is little research in the identity literature relating specifically to volunteers. Therefore, there is a need for the examination and development of key theoretical and empirical research in these areas with a view to giving a sharper focus on volunteering. This thesis offers new and important insights and challenges into theories of volunteering, addressing this under-researched area at the interface of the concepts of volunteering and identity. The thesis extends existing theories of volunteering relating to organisational scale and scope (Hill and Stevens, 2011; Rochester, 2012), through its research into a medium-sized voluntary organisation in the heritage sector, adding insights into the management of volunteer-led organisations as boundaries are confronted. It also provides nuance to the navigation by individuals of routes into volunteering which is often reduced to typologies (Clary, 1996; Dury, et al., 2015; Aydinli, et al., 2016); it adds to understandings of volunteer commitment to dangerous and perilous volunteering (Lois, 1999; Baxter-Tomkins, 2011; O'Toole, 2013; Collie and Greene, 2023) introducing the concept of 'risky' volunteering in a safety-critical environment; and also, importantly, to the management of volunteers by other volunteers (Holmes, 2004; Hagar and Brudney, 2015; Einasdottir and Osia, 2020) adding insights drawn from experiences of becoming a manager, and of boundary work when holding multiple positions. Utilising an identity lens, it focuses on the identity work of volunteers at boundaries, boundary transitions (Taylor, 2004; Beech, 2011; Kang, et al., 2011).

Figure 3.1 below offers the reader a 'roadmap' of the routes through this complexity as addressed in the thesis and is offered to help clarify how the concepts highlighted above inform the argument addressed. Figure 3.1 provides a diagrammatic representation of the three elements of the research question, which are then explored in more detail below.

FIGURE 3.1 Roadmap showing route navigated towards becoming an unpaid volunteer manager in a complex safety-critical environment



3.12.1 Navigating the routes into volunteering

Whilst conceptualisations of the motivations of volunteers have been researched (Clary, et al., 1998; Ferriera, et al., 2012; Nicols and Ralston, 2016; Smith, et al., 2020) and taxonomies developed from lists of reasons for volunteering, the literature takes a broad-brush approach to theorising how volunteers define their volunteering, missing important nuance within taxonomies. Whether or not individuals are likely to volunteer has been explored within the context of social service volunteering {Snyder and Omoto, 2008; Dury, et al., 2015). There is a significant gap in addressing what led individuals into their volunteering in the first place, which this thesis addresses exploring the narrations of those who became volunteers in the organisation studied (see Chapters 6.2, 7.2 and 8.2). In the literature there is often a reliance on questionnaires and listings and a more nuanced qualitative approach to the routes followed by volunteers into volunteering will extend current theorising.

When on the cusp of starting volunteering the individual will decide to join, or not to join, a particular organisation. By taking the decision to join the individual is entering a new place, and crossing a boundary in which a new identity will be created. A factor influencing such decision-making is the structure, scale and scope of the organisation and a sense of what the volunteer will experience whilst working and being managed in the organisation. Voluntary organisations have different approaches to structures and management (Hill and Stevens, 2011) and a volunteer-led organisation is likely to have different ways of managing its volunteers to one that is led by paid staff. By joining the voluntary organisation the new volunteer will undertake identity work to create a new identity as they navigate their way across new boundaries. Existing identities may be re-created as tensions are felt at boundaries – at the boundary between paid work and volunteering for example. Perhaps an initial decision on the part of the volunteer might be related to an expectation of the commitment the volunteer is prepared to give to the organisation to achieve a goal desired by the volunteer. Theorisations of volunteer commitment (Baxter-Tomkins, 2012; Stebbins, 2012, Holmes and Slater, 2012; O'Toole. 2013) can be nuanced further through the recognition of a variety of routes into volunteering within a 'risky' environment. Routes into volunteering narrated in this thesis and identity work at the interface of early expectations and subsequent engagement as a manager, perhaps holding multiple positions, are explored.

3.12.2 Becoming a manager

Not all volunteers become a manager but those who do must navigate their way through issues that make for complexity. The structure of the voluntary organisation, the work of the organisation and the individuals, – other volunteers and sometimes paid managers, make for complexities in boundary- crossing and identity work. The volunteer literature does not explore the possible routes to management and assumes that the volunteer management situation is not dissimilar to that in the paid work environment (Hagar and Brudney, 2015; Studer, 2016). This thesis explores and challenges the assumptions that becoming a volunteer manager is always similarly to that experienced in paid employment. The different routes narrated by volunteers on their journeys to management position are explored in this study (see Chapters 6.3, 7.3 and 8,3). Whilst notions of becoming a manager, for example through career progression, are theorised within the context of paid employment, research has not explored the actual experiences of unpaid volunteers becoming a manager. Literature relating to managing volunteers assumes that mostly the management activity will be undertaken by paid managers, with theorising drawn from the paid work experience. There also appears to be a presumption that managers are competent in delivering people management skills, or have access to professional advice. This thesis challenges these theorisations and recognises there are considerable gaps in in our understandings of the experiences of unpaid volunteers becoming managers of other volunteers, and in so doing this thesis contributes to filling that gap.

The environment in which this study was conducted is described as safety-critical – one in which there are possible risks to individuals that could lead to injury or even death, and taking on responsibilities for the management of others adds new boundaries and threats which require the volunteer manager to find ways of navigating. Dangerous volunteering has been studied (Baxter-Tomkins (2011), Weller (2017, 2020) and O'Toole (2013) has theorised perilous volunteering. A safety-critical environment is not perilous (O'Toole, 2013) and whilst potentially dangerous (Baxter-Tomkins, 2011; Weller, 2017, 2020) it does have significant differences at the boundaries of different risks. This thesis contributes a new insight of risky volunteering to the theorising of dangerous environments (see Section 9.3.2.4).

The volunteer who engages with responsibilities for managing others in a safety-critical environment also may also continue with their own volunteering activities and will undertake identity work at those boundaries. The unpaid volunteer manager is likely to experience boundaries with their own experiences of the paid work environment and with the environment of those they manage. Paid managers of volunteers often undertake the management of volunteers alongside other, different, management responsibilities (Brewis, et al., 2010; Nesbit, et al., 2016). This is similar to theories of hybridity of position holding in the paid work environment. Research in this area has primarily been with in the medical profession where doctors may also be managers (McGivern, et al., 2015; Martin, et al., 2017; Bresnen, et al., 2019). The circumstances of volunteer managers who may engage in quite different, unrelated, positions within the organisation have not been theorised within the literature, and this thesis explores narratives of managing boundaries and tensions.to contributes insights to theorising.

On becoming a manager, the volunteer has responsibilities within the overall management structure of the organisation. The organisational structure (Hill and Stevens, 2011) is likely to influence approaches to managing adopted by the volunteer. Organisations that are volunteer-led may have management processes different to those led by paid staff. With the literature largely assuming management processes are similar to those in the paid work environment a gap may be observed notably around issues of training. Training will necessarily be undertaken for essential operational activities that are safety-critical, and for some craft skills. However, issues of scope, scale and structure of the voluntary organisation may, make the management experience rather different. Training in management skills for example, may be lacking. The literature exploring this area mostly addresses the paid work environment and the paid volunteer manager. This creates a gap in our theorising of how volunteer managers in those organisations under the radar of most literature (Milbourne, 2013) experience becoming managers, and undertaking, management positions, along with the associated identity work to which this thesis adds insights.

3.12.3 Engaging in multiple position holding

This study focuses upon volunteers who undertake responsibilities for the management of other volunteers. Whilst the volunteer manager of other volunteers acts in a management capacity there will be boundaries to be negotiated, with identity work between that management activity and being 'just' a volunteer in a team. Similar boundaries have been studied and theorised (Korschun, 2015; Needham, et al., (2017) but in the paid work environment rather than in volunteering, thus leaving a gap in understanding. With the relationship to the organisation being different to the paid working situation (Cnaan, et al., 1996), there are differences within the volunteer context enabling a volunteer manager to hold more than two positions (as a volunteer and a volunteer manager, with a volunteer being able to hold several, sometimes quite different, positions. The holding of multiple positions creates further boundaries to be navigated, adds to the possibility of tensions at those boundaries and requires complex identity work (MacLean and Webber, 2015; Martin, et al., 2017; Einholf and Osia, 2020).

When engaging in multiple positions a volunteer manager is inevitably crossing multiple boundaries requiring complex identity work (Ashforth and Johnson, 2001; MacLean and Webber, 2015; Campion, et al., 2020). The crossing of multiple boundaries and associated tensions along with issues of boundary permeability, liminality and transitions create identity work for volunteers. Research into these issues is underpinned by assumptions of paid employment (Ashforth, 2001; Gordon, et al., 2020; Coogan, 2021). This thesis draws on the lived experience of unpaid volunteer managers holding multiple positions and contributes to theorising of multiple position holding (See Chapters 6.4, 7.4 and 8.4). Addressing this gap in the literature it makes an important contribution, theorising pathways by which volunteers may come to hold multiple positions and explores how they engage in the identity work associated with them.

This section has considered literature encompassing the theorising of volunteering through an identity lens, and found gaps in the literature of volunteering. It has proposed a roadmap to assist the reader navigate the research question “How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?” It has addressed this in relation to the three sub-questions and identified gaps in the literature, arguing there is a need for both more theoretical and empirical work to understand better the voluntary environment.

The following chapters explore, with the aid of the route map, the organisation researched, the methodology utilised and the narrations of volunteers at different locations, their similarities and differences contributing to the development of volunteering theory.

In the next chapter I will set the context of the sector and organisation in which my research was conducted.

CHAPTER 4: THE ORGANISATIONAL CONTEXT

4.1 Introduction

In this chapter I set the organization into its context within the Heritage Railway sector. There is a Glossary to de-mystify some railway industry terms and jargon included at Appendix 1. The railway's history will be given briefly as will its current scale and scope of operation. The three locations studied in this thesis will be explained in a little more detail to show what each does, how it carries out its responsibilities and what the volunteers at each location undertake. How volunteers do their work will be explained together with some aspects of the volunteer management process such as rostering.

4.2 Background to the Heritage Railway sector

Heritage railways in the United Kingdom are defined as lines of local interest, museums or tourist railways that preserve, re-create or simulate railways of the past (Office of Rail and Road, 2022).

The sector includes standard gauge (the same as the national railway network), narrow gauge and miniature railways. They are privately owned and many of the vehicles and buildings in use are of historic significance. The heritage railway sector has its own trade association, the Heritage Railway Association, which represents 139 working heritage railways, and also eight tramways, nine cliff railways and 25 museums (Heritage Railway Association, 2022). The most recent data shows the sector attracts 13 million visitors annually, had an income of £130 million, employs 2,867 paid staff and has 21,659 volunteers. (Heritage Railway Association, 2017).

The organisations who are Heritage Railway Association members have between them "560 miles of track, 460 stations, 800 steam locomotives, 1,000 diesel locomotives, 2,000 carriages and 4,000 wagons." (Heritage Railway Association, 2022).

Heritage railways are perhaps best known for providing train rides in historic carriages pulled by historic locomotives. Sometimes, heritage railways have their own museums containing railway memorabilia as well as displaying locomotives and rolling stock from the past.

Although individual heritage railways are relatively small and privately owned, they are subject to the same legislative controls as the national railways.

Therefore, unpaid volunteers who have management responsibilities within the heritage railway sector carry significant accountability for managing, and working within, a safety critical environment. Railways are inherently dangerous places, for example locomotives often weigh around 70-100 tonnes, carriages around 30 tonnes so, a train of a locomotive pulling six carriages could weigh around 260 tonnes, and steel wheels running over steel rails cannot stop quickly in an emergency.

A safety critical environment (Railways and Other Guided Transport Systems (Safety) Regulations, 2006*)* is one in which failure by persons or equipment may cause or lead to the risk of death or serious injury. Overall regulation of the railway industry is provided by UK legislation the implementation of which is overseen by the Regulator the Office of Rail and Road. (Office of Rail and Road, 2022a). The Railways and Other Guided Transport Systems (Safety) Regulations 2006, (Office of Rail and Road, 2006), designate many of the operational jobs on railways as “safety-critical”, this designation applying equally to heritage railways as to the national main line railways. A safety-critical job is one where a lapse, or failure to perform it competently, could lead to injury or death. Safety-critical work includes driving trains, dispatching trains, maintaining railway vehicles, installing telecommunications systems, using telecommunications systems, and the supervision of the training of individuals in safety-critical tasks (Office of Rail and Road, 2006: Para 23:1: a,b,c.). A summary of safety-critical positions is provided as Appendix 2

Through Health and Safety legislation enforcement of compliance is undertaken by His Majesty’s Railway Inspectorate who have powers to demand compliance, to order noncompliant actions to cease or, when serious breaches of safety issues occur, can prosecute a heritage railway and issue a prohibition notice ordering a railway to cease to operate until compliance has been achieved. The Office of Rail and Road note that they have particular interest, amongst other things, in the leadership and governance, inspection and maintenance regimes and competence management systems in heritage railways. (Office of Rail and Road, 2022). The competence management systems particularly concern people who are in safety critical positions such as drivers, firemen, dispatchers, guards, signallers and engineers. In the guidance to clarify safety critical activities the Office of Rail and Road (Office of Rail and Road, 2007) state that those carrying out safety critical work must have been assessed as being competent to undertake the work, and that “the assessment of competence is not just for safety critical workers but applies to everyone whose work and decisions can affect health and safety” (Office of Rail and Road, 2007:3). Annex A to the document lists sixty activities undertaken in the operation of railways explaining why each of those activities is safety critical (Office of Rail and Road,2007). Heritage railways are obliged to carry out risk assessments and devise safe working practices to mitigate risks. The legislation quite specifically includes volunteers: ““safety critical work” means any safety critical task carried out by any person in the course of their work or voluntary work” (Office of Rail and Road, 2006: 23:1:c).

Recently, the Office of Rail and Road (Office of Rail and Road, 2021) have issued a specific guidance note to wholly volunteer-run heritage railways to reinforce their responsibilities under the relevant legislation. Failure in safety critical activities in heritage railways, as elsewhere, can have serious consequences. Reports from the Rail

Accident Investigation Branch include at least two examples from heritage railways - a fine of £40,000 for breaches of safety legislation was imposed when a child nearly fell through a toilet floor that had been removed (Rail Accident Investigation Branch, 2018), and the death of a volunteer Guard who was crushed between carriages (Rail Accident Investigation Branch, 2012). A volunteer engaging in management within the safety critical environment is required to take on considerable responsibility.

4.3 'Country Railway': The heritage railway of this study

The subject of my research is a heritage steam railway located in England (hereafter called "Country Railway"), of long-standing. It is a volunteer-led organisation (Hill and Stevens, 2011) meaning that whilst supported by paid staff, the strategic direction of the railway is determined by its volunteer Trustees. It was one of the first standard gauge heritage railways to enter preservation. The railway is open to the public to provide train rides for passengers over approximately 9 months each year and seven days a week at the busiest times. It also provides special catering trains including, Pullman trains with up-market meal service, as well as lunchtime and dinner catering services. The railway hires out trains to customers for wedding breakfasts, is available as a filming location and, at its main station the shop and platform buffet facilities are available year-round. Special events such as those involving steam locomotives visiting from other heritage railways, model railways exhibitions, particular historical themes are organised throughout the year as well as events seasonally themed around Easter and Christmas. The purpose of such events is to attract more, and maybe new, visitors and to increase revenues.

4.3.1 A brief history

The railway of which Country Railway was formerly a part was built during the Victorian era when much railway building was undertaken (White, 1982). It was part of a network of routes linking major towns and cities, and the line Country Railway now utilises was one of a number of branch lines feeding into the main line. It was built well with sound track, signalling and stations. No major redevelopments took place, and into the middle of the twentieth century the look of the railway did not change substantially. Passenger numbers declined as road transport increased and goods previously carried on the railway transferred to the road.

Preceding the Beeching cuts (British Railways Board, 1963) of the 1960s, in the 1950s British Railways closed the whole branch line but negotiated with a group of young early preservationists who wished to save at least part of the line. Whilst sections of the line were demolished by British Railways, one section, now isolated from the national network, was acquired and through preservation activity formed the genesis of Country Railway. A few of those early preservationists became participants in this study. Over time the activities of Country Railway grew and opportunities were taken to increase the length of the railway by leasing and re-building some parts that had been demolished in the 1950s by British Railways. Operating facilities were improved with the building of new carriage sheds and workshops, and Country Railway now has a substantial fleet of steam locomotives, carriages and wagons (not all of which have been restored to working order).

4.3.2 Scale and scope

At the start of the heritage steam railway movement in the United Kingdom steam locomotives, carriages and wagons from mid-Victorian times until the 1950s were the focus of attention. However, diesel locomotives and rolling stock from the 1940s onwards and now even high-speed trains from the 1970s are entering preservation. An anecdotal observation by the author, although he has heard it from others, is that sometimes within individual heritage railways there are generationally-based disputes over whether or not diesel locomotives should be preserved at all.

Operating in the heritage railway sector Country Railway describes its objectives as being "the preservation for posterity of a country branch line, its steam locomotives, coaches and goods stock, signalling systems, stations and operating practices." (Country Railway, 2022). It is worth noting briefly that the notion of heritage is contested (Di Pietro et al. 2018). Perspectives include the claim that the heritage industry is imposed on others by middle-class ideas of what heritage should be and, therefore, what should be preserved; and suggestions that it is about grass-roots activism engaging in the retention of local traditions and activities. A usefully broad definition is "heritage is what contemporary society inherits and passes on" (Di Pietro et al., 2018:97). This definition would place the actions of the founders of the heritage railway and the subsequent actions Trustees and Directors into a temporal context. The Country Railway has collections of railway vehicles and artifacts of past times, reflecting a railway heritage that has been lost or is likely to be lost. The founders of 60 years ago concentrated on the preservation of steam locomotives, whilst later generations of volunteers, having observed the demise of the diesel locomotives which had supplanted the now discarded steam locomotives on the national railway network, and see these as objects needing to be preserved.

Field research was undertaken in 2018-2019 when Country Railway had a line eleven miles long, four stations, and substantial workshops for the maintenance of locomotives, carriages and wagons. It also has a museum holding many artefacts, a visitor centre with locomotives and interactive displays to aid visitors' understanding of steam locomotion, catering facilities both on platforms and on trains, and shops. Of its large collection of locomotives carriages and wagons, many are in operational use whilst others are statically displayed awaiting restoration. Of the four stations, three retain their buildings from Victorian times whereas the fourth had seen its original station building demolished by British Railways in the 1950s.

Country Railway is volunteer-led and run (Hill and Stevens, 2011) with volunteer Trustees and Directors setting the strategy with a number of paid staff employed to operate the railway. Country Railway has approximately 10,000 members - supporters who pay an annual membership fee. In exchange for their fee they are given discounts on most train ticket purchases for their own travel, receive the quarterly magazine, have free entry to the stations and museum and have a discount in the railway's catering outlets and shop.

Of those 10,000 members approximately 800 are active volunteers, involved in running all aspects of the railway. Country Railway employed (pre-Covid19) about 60 paid staff, including administrators, departmental managers, skilled engineers and workshop staff, shop and catering staff. The catering staff were the largest in number, many being customer-facing waiting staff, of whom a number were part-time or seasonal employees. In all situations paid staff and volunteers worked alongside each other. During the course of preparing this thesis the Covid-19 pandemic struck and many of the paid staff, particularly in the catering department left, the organisation, although 2022 is seeing recruitment taking place to bring the paid staff numbers up to the needs of Country Railway as its business builds up again.

4.3.3 Organisation structure

Country Railway is a significant small to medium sized business with an annual pre-Covid19 turnover of some £4 million. It is a complex organisation with separately constituted charitable and commercial business structures. Whilst the railway is volunteer-led, a small number of directors with some specific skills required by the business are paid. The other directors and trustees are volunteers who, along with the paid directors, have formal responsibilities for governance and compliance under the Companies Act (2006) and the Charities Act (2011).

Although the railway turns over about £4 million per year, this income does not provide adequate funding for restoration projects to be undertaken, and in addition to earned revenues, the railway relies on its significant fundraising activities. The cost of the restoration of locomotives and rolling stock is high, and operational steam locomotives require a major overhaul every ten years – the limit allowed for the life of a boiler. Such overhauls cost around half a million pounds, more if work has to be sub-contracted, and there is always one locomotive undergoing a major overhaul. For the operating fleet of locomotives the cost of overhaul is accrued from revenues over the ten year period; for the restoration of locomotives, sometimes from almost derelict condition, fund-raising is undertaken either by the charitable trust or by those individuals who want to do the restoration.

An issue for Country Railway, and for all heritage railways, is that many of the skills required to maintain and restore heritage steam locomotives are no longer in general use elsewhere and training a new generation of steam locomotive engineers is undertaken by the in-house training of apprentices who are employed for the period of their apprenticeship. A similar situation applies to the maintenance and restoration of rolling stock although the skills required are a little more generally available and can be passed on from volunteer to volunteer.

As can be seen, it is a complex organisation requiring the coordination of many activities to operate safely and effectively. The rest of this section will overview the work of each department and the coordination required to bring everything together. Table 4.1 below provides a summary.

Table 4.1 Summary of departments and activities

Department	Activities
Locomotive engineering	Overhaul and maintenance of steam and diesel locomotives
Rolling stock	Overhaul, maintenance and restoration of carriages and wagons
Infrastructure	Civil engineering, construction and maintenance of buildings including stations and track, maintenance of the permanent way (track), electrical engineering, signal and telegraph engineering.
Operations	Footplate crew, station staff, signallers, guards, shunters, operations managers, inspectors.

Communications	Public relations*, internal communications
Commercial	Customer service, marketing*, retail, business development*
Retail	Catering at stations and on-train.
Administration departments	Finance*, company secretarial, HR*, membership, safety, IT

(Those carried out only by paid staff shown with an asterisk *)

The Locomotive Engineering department is responsible for the maintenance and overhaul of locomotives. It is overseen by an employed manager, an engineer, and is staffed by a mixture of employed skilled engineers, volunteers and paid apprentices. Its primary objective is to ensure there are sufficient locomotives available to run the trains, and to effect any repairs necessary to those in service. It also undertakes regular maintenance checks on locomotives and overhauls.

The Rolling Stock department operates in a similar way being overseen by an employed manager, employed supervisors and skilled engineers and supported by volunteers. Ensuring there are fully serviceable coaches for the trains to be run is the primary task, with maintenance and overhaul of the rolling stock on-going. Carriage and wagon restoration is undertaken by volunteers with help from the employed skilled staff when they have time, and is usually subject to sufficient funds having been raised for the specific restoration. The restoration of locomotives and rolling stock can have very long timescales and are subject to the finances being found and to the necessary skills being available – for the restoration of locomotives time scales well in excess of ten years are not unknown.

The Infrastructure Department has responsibility for the track, buildings, plant and signalling of the railway. The track has to be maintained and replaced when wear on it dictates; the railway is eleven miles long, with double track in places, plus sidings giving about twenty miles of railway track to maintain. A permanent way team controls the 22 miles of lineside vegetation (eleven miles of track with vegetation on either side), and inspects the whole line regularly, undertaking minor repairs when necessary and calling for more major work to be undertaken when more expertise and civil engineering skills are required. Heritage railway track is constructed in sections of sixty-foot lengths known as track panels and replacement usually involves the construction of panels at locations close to workshops, although individual rails can be replaced in situ. The use of cranes and other machinery is required to lift the track panels and other engineering plant to remove old ballast and replace it with new prior to setting the new track panels in place. The final part of a replacement job is to ensure the track is level and secure ready for the safe operation of trains.

The buildings at Country Railway comprise stations, their platforms and associated structures such as booking halls, toilets, buffets, restaurants, the carriage sheds and workshops, signalling and signal boxes. The Infrastructure Department is responsible for their maintenance and repair and for the construction of new buildings such as carriage sheds. Within the Infrastructure Department a specialist and technically difficult function is that of signalling. The signalling engineers design and maintain the signalling equipment that enables trains to travel along the railway safely, always ensuring that no train is ever in dangerous proximity to another. It is one of the most safety critical activities as locomotive crew rely on the signalling system to give them permission to move their train along the track in safety. Put simply, the track is divided into sections of varying distance according to track layout, points, stations etc. A train can only enter one section of track once there is no other train in it.

The Operations department ensures the railway operates in a safe and efficient way, and included in this department are the locomotive crew, station staff, signallers and guards as well as those responsible for setting and assessing competence standards. The operation of the railway is undertaken in accordance with the Rule Book, a formal document that applies to all involved in operating the railway, which details how operational activities are to be carried out. The Rule Book is based on the British Railways Rule Book 1950 as updated to 1961. The contents of the Rule Book is shown at Appendix 3. The Operations department develops the working timetable in conjunction with other departments to ensure that locomotives, carriages, catering, signalling and the necessary staff are all in the right place at the right time throughout every operating day.

The Communications department consists of a small team responsible for public relations and internal communications.

The Commercial department looks after marketing, customer relations, advance ticket sales, planning special events and liaison with schools about educational visits. There is liaison particularly with the Operations department to confirm the feasibility of putting on special events such as rail galas, special locomotive visits and seasonal activities. Most of the staff in this small department are paid employees, supported by a few volunteers.

The Retail department concern is shops and catering, with the railway having one substantial shop at its busiest station managed by paid employees and staffed by volunteers. Catering is provided at all the stations, with a licenced restaurant at the busiest station. On-train catering is undertaken for the special dining trains, often operating in the evenings. Some paid staff are employed as part-time waiting staff, alongside volunteers.

There is no specific Administration department and, therefore a number of small departments under that heading have been combined including Finance, Company Secretariat, HR, membership, safety and IT. These activities help ensure the effective management of the employed staff as well as other typical business activities. Those responsible for these activities comprise employed staff and volunteers.

The organisation is complex and coordination between the various functions is required to ensure that the employed staff are utilised effectively and activities which rely on volunteers are functioning as required. A brief example might be a commercial decision to run a special event for its revenue earning potential, requiring the employed managers of the locomotive and the carriage and wagon departments to confirm they can provide the resources. It also requires Roster Clerks to find volunteers willing to give extra time to enable the special event to be run successfully. An employed senior manager, in considering the complexity involved in running a railway and talking about the issues faced by unpaid volunteer managers suggested:

> *..."to be a volunteer manager of about 100 people, that's quite a big ask." [29].*

Reflecting a little deeper about volunteer managers who were also in paid work elsewhere Participant 29 proposed:

> *"I think you've got to be a special kind of person to do a day job, be a volunteer manager, and also do a functional role on the railway as well." [29]*

The organisation is complex, the process of coordinating the activities of the departments is complicated, many positions are safety critical which brings with it personal responsibility, and many of those who engage in management in this environment are unpaid volunteers.

4.4. The three locations

The section above sets out a brief overview of the structure and environment of Country Railway. In this section the work of the three locations is considered in a little more detail – the locomotive footplate, the stations and the workshops as these were the locations in which my research was conducted.

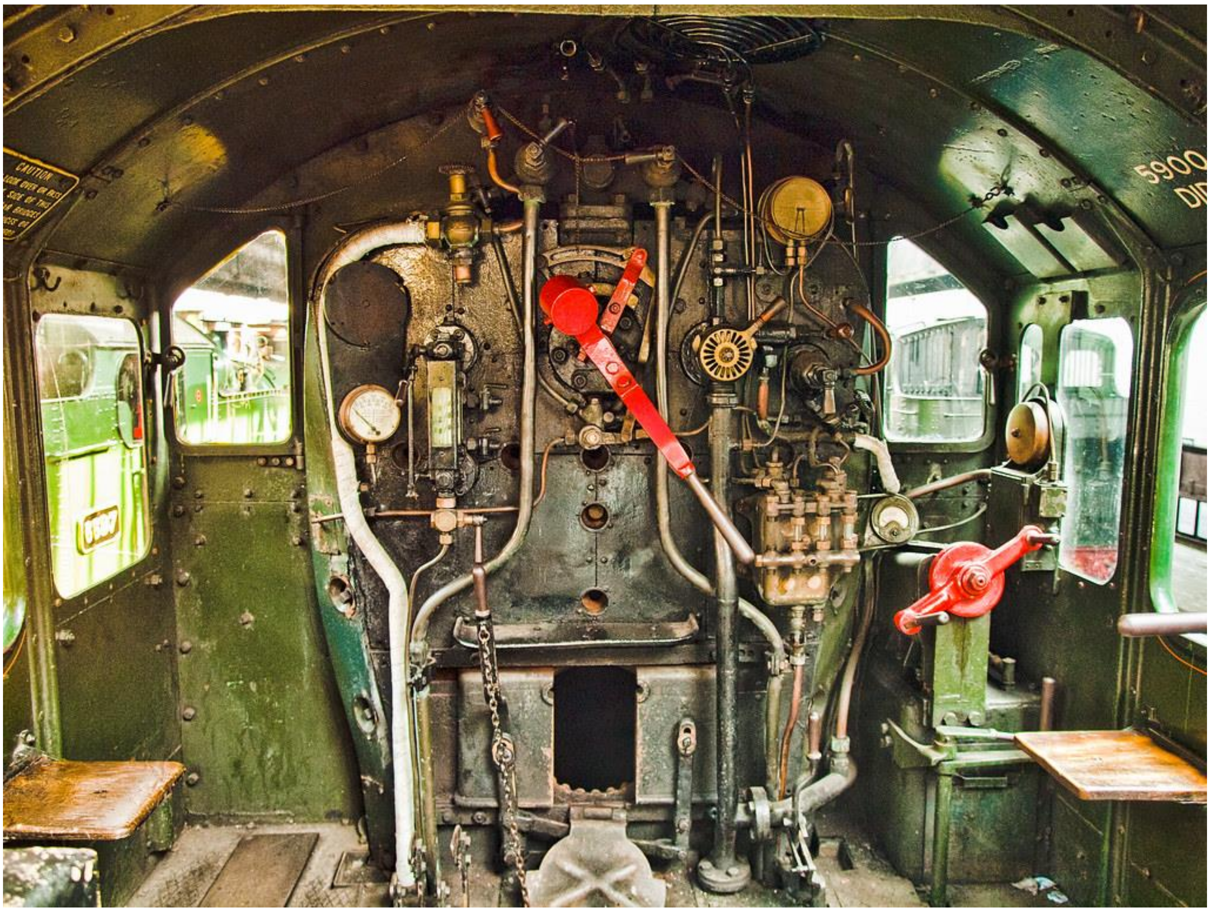
4.4.1 The steam locomotive footplate

A steam locomotive is the powered vehicle that pulls carriages and wagons along the track. A very rough analogy for a steam locomotive is a kettle which uses energy which, in our homes is usually powered by electricity or gas, to bring water to boiling point. A steam locomotive uses coal which is burnt to provide the source of energy to boil water to the point where the water is converted into steam. The steam is then used to drive the machinery that makes the locomotive move.

Steam locomotives were invented early in the 19th century and developed into increasingly powerful and versatile machines until their withdrawal from use on the United Kingdom's main line railway network in 1968. For reasons to do with the type of work and loads they were expected to move many different steam locomotives were designed and constructed. Each was hand built in factories by skilled craftsmen, and in a legacy from the Victorian era they were mostly very strongly constructed in a way that today would be described as 'over-engineered'. This over-engineering meant that many steam locomotives had long working lives – up to sixty years was not uncommon. When steam locomotion ceased and many redundant locomotives were left parked in the open for up to twenty years or more they survived sufficiently well to be saved by preservationists and restored to working order.

The steam locomotive footplate, in a partially enclosed cab, is that part of the locomotive where the crew do their work. It is a rather spartan place, open to the weather, hot and dusty from the coal burned as fuel, draughty when the wind blows wet when it rains and in winter, unless one is close to the firebox, can be cold. The task of the crew on the footplate is burning the coal to boil water to produce the steam energy to power the locomotive, as well as controlling the locomotive and driving it and its train safely to its destination. Figure 4.1 below illustrates a steam locomotive footplate.

FIGURE 4.1 A steam locomotive footplate



The crew comprises a Driver who is in overall control of the locomotive and its safety-critical environment, who knows intimately the route the train will travel and manages the other footplate crew members, along with a Fireman responsible for keeping the fire burning (unlike Firefighters, also sometimes called 'Firemen' whose purpose is to put fires out). Much of the Fireman's work entails shovelling coal into the firebox to create the heat to boil the water, as well as ensuring there is always sufficient water in the boiler. As the coal in the firebox burns at temperatures between 1093 – 1371 degrees Celsius (2,000-2,500 degrees Fahrenheit), the footplate can be a hot place to work. The fire produces steam in the boiler at a pressure, according to locomotive type, from about 8.27 Bar (120 lbs per square inch), up to 17.23 Bar (250 lbs per square inch). On a steam locomotive on a heritage railway of, say, four miles length each way, completing five round trips a day, the volunteer Fireman of a small locomotive will shovel around 1.5 tonnes of coal into the firebox. The larger the locomotive, the longer the journey and more trips completed, the more shovelling of coal is required.

The Fireman is also responsible for being the Driver's second pair of eyes as the Driver can see out only on one side of the locomotive due to the height and length of the boiler. The Fireman looks out of the other side, with both looking out of the footplate windows to check signals or anything that may impact on the safety of the train. The locomotives of Country Railway also usually have a Cleaner on board, the Cleaner will be a person training to be a Fireman.

One other point about heritage steam locomotives is that very rarely are any two locomotives similar. They have different designs, differing control arrangements, and require different ways of driving and firing. An outcome of this is similarly to airline pilots the Drivers of steam locomotives have to be assessed as competent to drive each different type of locomotive.

There are approximately 120 footplate crew at Country Railway and all are volunteers. The footplate crew is hierarchically structured with the Driver in overall charge (the manager) of the footplate crew with responsibility for the safety of locomotive and its train. To train to become a Driver there is a structured progression. One must first be assessed as a competent Fireman, and to become a Firemen be assessed as a competent Cleaner. The bottom position in the hierarchy is that of Cleaner and as the job title suggests has responsibility for cleaning the locomotive to make it a shiny and visually attractive machine, as well as a clean workplace. The principle from Victorian times behind the Cleaner's job is that by cleaning the locomotive an individual becomes familiar with the layout and function of all its different parts. The Cleaner will also be responsible at the start of the day for lighting the fire for the Fireman.

Much of the training is on-the-job on the footplate with the Driver training the Fireman, and the Fireman training the Cleaner. There is also classroom-based training to impart relevant knowledge and understanding. The time to progress from Cleaner to Driver can be long – up to ten years sometimes – but this must be put into a volunteering context as the timescale will depend, amongst other things, on how much time an individual devotes to their volunteering. Progressing to Driver is the aim of most of those starting on the footplate progression route, although Driver is not always seen as the most enjoyable job. Participant 23 who is a Driver puts it thus:

> *"... although the thing I enjoy the most is firing, actually getting to the final level, top level, is always the intention" [23]*

For more information on driving steam locomotives see British Railways Board (1957); and on railways generally see Jackson (2000), Simmons and Biddle (1997).

4.4.2 The stations

Country Railway has a number of stations and participants for the research were drawn from two of them. The two stations, which are four miles apart have similarities and differences. One is a terminus station, Station [1], the other, Station [2], has trains calling but they are passing through en route to other stations. Both still retain some of their original Victorian buildings with some more modern additions.

Station A has a range of facilities for visitors including toilets, a restaurant, shop, a museum and a shed with a number of static locomotive exhibits. It also has the offices of a number of administrative functions, and the restaurant kitchen provides the catering for on-train food service. Station B has toilets, a buffet, two shops run by volunteers to raise funds for particular projects, a small cinema showing historic railway films (on a loop system) and a children's play area. It is also the location of a number of workshops, and short tours are made available for visitors to view restoration activities in the carriage and wagon workshop. There are sheds for the undercover storage of carriages and sidings storing some vehicles in the open air. Both stations have booking offices where passengers can purchase tickets.

Each station is staffed by volunteers who cover a range of activities including checking tickets, helping passengers board trains, answering passenger queries and dispatching trains, as well as keeping the stations clean including cleaning the toilets. Overall, the station staff are there to ensure that passengers have a good visitor experience at the railway. To be able to cover the busiest working times when Country Railway has seven-days-a-week operation Station A has a roster of about 60 volunteers engaged in station duties, Station B has about 35 volunteers.

An important duty for station volunteers is the dispatch of trains - a process of ensuring all passengers are on board, all carriage doors are closed securely, advising the Guard by hand and whistle signal that the train can safely leave the station and ensuring no one tries to board or leave the train once it is ready to go. This train dispatch process falls into the safety critical category, necessitating specific training and assessment to ensure competence with the tasks. Country Railway has a formal competency-based training programme for all station staff, all volunteers, which cover a number of subjects, including train dispatch, other platform duties, safety on the track and platform, a basic understanding of how railway signalling operates, cleaning and customer service. The station staff are graded into a hierarchy from new starters to Station Masters. New starters are Trainee Porters and successful assessment in the three initial, non-safety critical competencies leads to promotion to Porter. Successful completion and assessment of a further six competencies leads to promotion to Leading Porter which is the grade at which the individual is considered able to undertake safety critical duties. Training up to Leading Porter is on-the-job with the next in the hierarchy, Station Foremen, undertaking the training process. The job of Station Foreman is to supervise Porters and Leading Porters on duty, the position being filled by application and subsequent success in an interview. On appointment to the Station Foreman position volunteers begin a programme of station management training in a number of assessed competencies including the management of staff, wider railway safety awareness and an understanding of the duties of signallers, booking office staff and locomotive crew, plus competence in a number of practical operational tasks such as being able to hand signal trains should there be a breakdown in the normal signalling system. This training programme is designed to prepare a Station Foreman for the most senior station position, that of Station Master who oversees the whole station operation. However, as is noted in the Results chapter

(Chap 7) despite the appearance of a common system, the stations do not follow exactly the same approaches and practices.

Station volunteers dress in a uniform which creates a visible element of identity recognisable to other volunteers such as locomotive crew and Guards, and to customers on the platform (Pratt and Rafaeli, 1997; Humphreys and Brown 2002; Kang et al. 2011). The uniforms worn are based on designs of those used by the former railways from which heritage is drawn. The uniform is not provided by the railway and whilst following a common broad theme there are slight variations according to an individual's choice, for example, the style of jacket, and perhaps ability to fund the cost of providing the uniform. A further distinction is that different stations wear uniforms of different eras – a policy decision to recreate different heritage periods.

At Station A the station staff wear uniform based upon those worn in the Victorian era, whilst at Station B it is the between-the-wars era of the twentieth century. Station volunteers at Station A wear Victorian style hats that signify the position held by the wearer and thus their status among the station staff (Pratt and Raefelli, 1997). Figure 4.2 below illustrates the hats and how status is indicated.

Figure 4.2: Station staff headgear as indicators of status

From left to right: Station Master – Station Foreman – Leading Porter – Porter.

The uniform and headgear of Station A have implications for the identity of the individual and this is discussed further in Chapter 9. The staff at other stations wear uniform related to particular phases of railway history and which do not follow this headgear protocol. There are some other differences between the two stations such as at Station A the Booking Office is staffed by a team of volunteers whose sole task is ticket selling, whilst at Station B, where fewer tickets are sold, the Booking Office is run by the station staff as a part of their work. Station B has a small buffet and should there be no employed catering staff available to open it, the station staff will open the buffet sell only pre-packaged items such as sandwiches, crisps, packaged cakes and chocolate bars.

4.4.3. The workshops

Country Railway has a number of workshops which undertake tasks including the maintenance, repair and restoration of locomotives, carriages wagons, signalling equipment and other metal work. Some workshops have a combination of paid staff with volunteer support, some are run by volunteers only, none are run only by paid staff. There are locomotive workshops located at Station A, a workshop for carriages and wagons at Station B, and also at Station B there is a signalling workshop run by volunteers. A workshop narrated by participants as being a 'metal bashing' workshop, is run by volunteers undertaking a variety of metal working including the utilisation of blacksmithing skills.

4.4.3.1. Locomotive workshops

There are several workshops at Station A devoted to locomotive maintenance and restoration. The largest is well-equipped with a variety of specialist machinery from which small parts can be repaired or new parts manufactured. The workshop staff undertake day-to-day repairs of locomotives, planned overhauls at pre-determined periods for each operational locomotive and can undertake some restoration work when resources permit. The workshop is managed by a paid manager, staffed by paid staff supported by volunteers, and has a number of apprentices learning steam locomotive engineering skills. The activities of the workshop are supported by what is known as a 'running shed', a covered building in which the locomotives in use on any specific day can be parked whilst preparatory, and concluding, work can be undertaken and any small repairs effected.

To explain a little further – a steam locomotive typically takes some three hours from a crew member starting to get it ready for service until it is ready to pull a train. The locomotive fire has to be lit and built up carefully to start heating the water to produce the steam needed. Whilst this is happening the crew manually oil and grease the locomotives working parts, and the Cleaner cleans it. This is done against the timetable for the running of trains, with the time the locomotive has to be ready to go known as the “off shed” time. At the end of the working day the locomotive returns to the running shed for the crew to undertake the process known as ’disposal’ which includes clearing ash from the firebox, cleaning ash and dust from the smokebox at the front of the locomotive and ensuring any residual fire in the firebox will burn away slowly to ensure the metal which has experienced extremely high temperatures cools without distorting. The working day for the locomotive crew is often long, although never exceeding 12 hours. If the time from lighting up to completing disposal is planned to exceed 12 hours, two crews will be rostered, one taking over from the other mid-way through the working day.

At Station [A] there is another workshop/shed specially constructed from funds raised for the restoration of a particular steam locomotive which is funded and run by volunteers. Around the workshop and shed areas there are particular areas devoted to the maintenance of steam locomotives including pits in which engineers can access the underneath of a locomotive, and also into which ash from the firebox can be dropped and then shovelled out to be put into an ash storage area.

4.4.3.2 The carriage and wagon workshops

These are located at Station B and comprise workshops, again for the maintenance of the carriages in operational use, as well as for the restoration of carriages and wagons. The workshops are equipped with relevant machinery, including woodworking machines, as heritage carriages and wagons incorporate wood in their structures. The workshop is overseen by a paid manager with paid engineers who focus on the maintenance and repair of the carriage fleet in use for passenger services. Similar to the locomotives, carriages need regular routine maintenance from daily checks up to a full overhaul. There are sub-workshops staffed by volunteers undertaking the restoration of carriages and wagons, as well as a specialist upholstery workshop. Associated with the workshops are large sheds in which carriages can be stored under cover when not in use in order to reduce the deterioration caused by weather, particularly rain and sun, as the metal can rust and the woodwork distort in such heritage structures.

4.4.3.3 Other workshops

There are other workshops located at Station B, notably one for signalling equipment, although the 'workshop' is actually a number of separate buildings used specifically for this purpose. The design, manufacture, maintenance and repair of heritage signalling equipment requires particular skills no longer found outside the heritage sector and ensuring these skills are retained is important to the railway. The other workshop at Station B is that used for the so-called 'metal bashing' activity and, again, this workshop comprises number of small buildings associated with the particular tasks of creating and repairing, sometimes large objects such as signal posts, from metal.

4.4.4. Other locations

Virtually all the participants in the study had one of the three locations above as their primary bases of activity. There are, however, two participants who, whilst interviewed at a station, do not undertake activities related to the operation of the station as they are involved in management and administrative duties for the whole of Country Railway. A third participant not fitting into the three locations is a Guard in his primary volunteering activity, and, whilst doing this, most of his time is spent on the move in a Guard’s compartment in a carriage on a train.

4.5 The volunteers

There are approximately 800 volunteers working at Country Railway only some of whom will be at the railway at any one time. Volunteers who work in the Operations Department – locomotive crew, station staff, signallers, on-train staff, work according to their rostered days, times and duties.

4.5.1 Rostering

Briefly, the rostering process is driven largely by commercial and other decisions that lead to the construction of a timetable of published railway services made available to the public. The number of volunteers required can be calculated based on that timetable, the dates when train services are available, the number of trains to run on each day, any special events and so on. The Roster Clerks for the different parts of the department can then produce a matrix of the dates and jobs that are required to be covered to make the timetable workable. This information is made available to the volunteers who have the required competences so that each individual is able to decide from their own circumstances which days they are willing to offer to the railway. The Roster Clerks then match the availabilities with the railway’s needs, from which the necessary jobs can be covered and by which specific individual. It is a complex process as volunteers have to be competent in order to undertake the tasks for which they are rostered and, given the hierarchical nature of the footplate and station staff there are only a limited number of individuals who can be rostered as locomotive Drivers or

Station Masters. However, volunteers capable of doing those particular jobs are also capable of doing jobs lower in their hierarchies, so could be rostered as a Driver on one day but because no-one has offered to be a Fireman on a different day, that Driver may be rostered as a Fireman to cover the duty. The same situation might occur with the station staff. The Roster Clerks also have to react to short notice withdrawals as volunteers sometimes become ill, or have competing demands on their time, and so replacements have to be found.

Sometimes a number of the dates a volunteer has offered to the Roster Clerk may not be taken up as particular dates may be oversubscribed. The Roster Clerks have a complex task to balance the needs of the railway with the expectations of volunteers, to ensure that individual volunteers are not over- or under-utilised, to ensure that each volunteer works sufficient days in their job to ensure they remain competent.

Those volunteers who are active in the workshops are not usually rostered in the same manner. One slight exception is that footplate crew have a day in each roster period when they help in the locomotive workshop (they also do this as a part of their training). This has a dual purpose in that they remain familiar with some workshop activities and also, in the event of a rostered crew member being unable to attend, they can be diverted from the workshop to the footplate.

Volunteers working in the workshops may be involved in particular tasks or projects and can, therefore, self-manage their volunteering days. Sometimes this becomes more formalised when the work of one volunteer needs to be completed before another can get on with their task. In this circumstance, some kind of project management is undertaken so that everybody understands the workflow and when they need to attend. Volunteers engaged in restoration projects may spend years seeing the project to fruition as often funds and the time volunteers can devote to their volunteering are the drivers.

4.5.2 Retaining competence

The idea of retaining skill competence within the railway can be viewed from both the perspective of the individual and the railway itself. From the individual's perspective reference has already been made to the competence of staff required by the railway regulators which underpins the training provided to volunteers as they learn specific skills, particularly those related to safety critical jobs. Furthermore, the Regulator requires individuals in safety-critical positions to be re-assessed every three years. This is why, as mentioned above, the Roster Clerks have to ensure that every individual is provided with sufficient work opportunities to retain the necessary skills. From the individual's perspective, for this to be achieved, they must offer sufficient availability to the Roster Clerk. This also applies to those undergoing training - the fewer days offered to be available at the railway, the longer the training will take.

From the railway's perspective retaining competence covers everything referred to above in respect of rostering and, additionally, noting the turnover of volunteers as they cease to be active - as some people volunteer relatively little and a few cease to be competent. The railway has to calculate how many volunteers it needs in its system at any one time to address these issues – which is not an easy task.

4.6 Conclusions

This chapter has addressed the nature of the heritage railway sector in general and of Country Railway specifically. The number of heritage railways in the United Kingdom who are members of the Heritage Railway Association is considerable and, whilst the numbers of volunteers is substantial at 21,659 in 2016 (the latest date for which data is available), that number is less than half the 50,000 volunteers attributed to the National Trust (National Trust, 2022).

Whilst there are other organisations that have safety concerns for their volunteers - voluntary firefighters, some social care volunteers for example, the heritage railway sector is highly regulated in how it can carry out its activities. Country Railway relies on volunteers taking responsibility for the strategic direction of the organisation as well as a large amount of first line management, on the footplate for example, to ensure that the safety-critical aspects of operating the heritage steam railway are achieved.

The chapters exploring the three locations will explore how participants came to join Country Railway, how they became managers and their holding of multiple volunteer positions.

The next chapter will explore the methodology and research methods used in my study.

CHAPTER 5: METHODOLOGY

5.1 Introduction

This chapter discusses the methodology for my empirical study exploring how volunteers navigate the experience of becoming managers in a complex safety-critical environment. In summary, the methodology chosen is qualitative and ethnographic, it is also underpinned by a subjectivist, interpretivist and constructionist position.

5.2 Research paradigms and the framing of my research

Discussions about and understanding of research paradigms provide means for understanding the role of the researcher and their relationship to research process and findings that are developed from this (Guba and Lincoln, 1994). These research paradigms are often related to ways thinking about ontological and epistemological questions, the answers to which help shape the research process (Duberley, et al. 2012). Classically, ontological questions relate to the ways in which we regard reality/ies or the world in general, whist epistemological questions concern how we generalise knowledge about those reality/ies (Dyer, 2006; Duberley, et al., 2012). However, across this chapter and thesis more widely, I reflect that ultimately, it is the researcher's decision based on their judgement about their approach to their research that determines the label used to describe their research. Thus, while labels shape the research processes, our experience of research processes also shapes how these labels are used (Cordiner, et al., 2018).

My thesis is focussed on exploring an area that has been the subject of little prior research. My approach to research aimed to explore how volunteers navigate the experience of becoming managers in a safety-critical environment; an experience which is one aspect of the multiple realities in their lives. This research does not seek to produce generalisations but to explore the multiplicity of individual experience, viewing the world through a subjective lens and recognising the complex contexts and ways in which the participants experience and then narrate their volunteering. Moreover, I recognise that this collection of their experience is contextualised within the research process.

There are many different labels used for different paradigms. For example, Guba and Lincoln (1994) identify positivist, post-positivism, critical theory, and constructivism, whilst Mackenzie and Knipe (2006) offer positivist/post-positivist, interpretivist/constructionist, transformative and pragmatic. There are then overlaps and inconsistencies in the presentations of potential paradigms, as Buchanan and Bryman (2007) note: “the paradigm wars of the 1980s have thus turned into paradigm soup”, which does not make life any easier for new researchers!

Specifically, the paradigm adopted for my research is that of social constructionism as this best fits with my aims and approach. Whilst this itself is also a topic of much debate Burr (2015 p.222) highlights that: “The key tenet of social constructionism is that our knowledge of the world, including our understanding of human beings, is a product of human thought rather than grounded in an observable, external reality”. This individual construction of reality is important for consideration of the ontological question of the nature of reality (Guba and Lincoln, 1994). The ontology for a social constructionist approach is one in which the individuals, alone and collectively, ‘create’ their own reality. Thus, there is not one 'reality' waiting to be found as there are as many realities as there are people. Reality is therefore subjective, subject to change and reinterpretation and there is no one ultimate truth. Reality for an individual will change dependent on a range of factors including their current status – the work they do, their role in a family, stage in their life cycle amongst other things (Ibarra, 2009; Ibarra and Barbulescu 2010; Kimberley, 2019; Weick, 1995). If we accept reality is constructed, then a social constructionist approach may be a way of uncovering of the components needed for understanding.

This ontological perspective then drives to the next question – what is the nature of knowledge? From an interpretivist stance knowledge is subjective with each individual socially constructing their interpretations of reality through everyday talk, as people engage in "forming, repairing, maintaining, strengthening and revising" their identities (Alvesson and Willmott 2002, p.626).

Social constructionism frames this research, pursuing the idea that our knowledge of the world is an outcome of human narrative, rather than an observable reality (Burr, 2015). Indeed Burr (2015) notes that "Social constructionism problematizes the claim that what we call knowledge ....is derived from unbiased observation of events: that what exists is what we perceive to exist" (p.224). Arguing for the social construction of knowledge Gergen (2015, p.99) claims "(T)raditions of language in use construct what we take to be the world". How we use our language to communicate "finds its origins in human relationships" (Gergen, 2015: p.99) as language and learning are shared within and between communities, somewhat analogous to Berger and Luckman's

(1996) ‘sub-worlds’. Gergen (2015) suggests that culture is not something “buried deeply within the minds of its participants but is carried within the taken for granted forms of relating” (p.104).

In their seminal work, Berger and Luckman (1966) contend that reality is socially constructed and that “(A)mong the multiple realities there is one that presents itself as the reality *par excellence.* This is the reality of everyday life” (p35. Italics in original text). Berger and Luckman, (1966) refer to primary socialisation as that which occurs during childhood, whilst secondary socialisation is “the internalisation of institutional or institution-based ‘sub-worlds’”. (p.158). The two aspects of socialisation are interconnected, the primary influencing in varying degrees the secondary. Relevant to my research the ‘sub-worlds’ include those environments in which the individual learns the craft and skills associated with a particular activity, Berger and Luckman refer to a cavalryman learning skills of horse-riding and how communication with fellow horsemen is then structured. In the case of my research, it could be people either bringing or learning the skills and language of heritage railway operation to be able to communicate and manage within that environment.

That knowledge is created by human thought is “a key tenet” Burr (2015, p. 222), of social constructivism which opens the door to the idea that there is no objective and final account to be had (Burr 2015). This approach implies that there will be multiple ways of investigating the world we inhabit, as we interact with others in creating our world (Burr, 2015; Cunliffe, 2008). Multiple ways of investigating the world include being open to consider for example, the social, historical, economic and political areas that help create the culture in which we live, and recognising that time and location have important implications – such as historical values that may have changed over time, and where we were born, (Burr 2015). We should also be mindful as Gergen (2015) reminds us that culture itself is a creation of human talk. Those interactions we have as we construct our reality and make sense of it, take place with others and within the overall framework of the social world in which we live, (Burr, 2015, Cunliffe, 2008; Gergen, 2015; Weick, 1995). That the social context should be not in the background is suggested by Bridgeman and De'ath (2017). Whilst methodologically choices are made from available options for research, there is no overarching approach (Cunliffe, 2008, Thorpe 2008). Moreover, it is important to consider that ideas about social construction are also socially constructed Thorpe (2008), Stam (2002).

Many debates focus on the issues of construction but tend to neglect the examination of what is understood by social. Often this is assumed to refer to human aspects. However, broader social context is implicated in the construction (discussed further below) as is the material world. Therefore, here I offer a brief consideration of my own research contexts which are inextricably material: messily, noisily and sometimes dangerously material. The relationship between individuals and material artifacts has been considered mainly from two perspectives - the techno-centric which is "interested in how technology leverages human interaction" (Orlikowski, 2007, p1436) and the human-centred about how "humans make sense of and interact with technology" (Orlikowski, 2007, p.1437), and the two approaches are "considered to inextricably related – there is no social that is not also material, no material that is not also social" (Orlikowski 2007, p.1437). This perspective provides a framework to consider the material and the social, for example how organisations design physical space (Valand and Georg, 2014, 2018), dress (Pratt and Raefeli, 1997), and the use of smartphones (Symon and Pritchard 2015). For my research the contextual interest is how some individuals relate to an older technology, steam locomotives and also, to dress. This is discussed further in Chapter 9.

If one accepts reality is constructed within a social context between individuals who have their own differing approaches to that construction, (Burr, 2015; Cunliffe, 2008), then the researcher might utilise a range of methods. Research should have a focus "in discovering how individuals make sense of their surroundings" (Cunliffe, 2008, p.127), and recognise that the individual whilst having agency is also influenced by the bigger society they live within, with complex and multiple ways of perceiving and identifying that reality influenced by the "polyphony" (Cunliffe, 2008, p.130), of voices within the dialogue. This often leads researchers towards ethnographic, situated interview and narrative methods as I explore later (Cunliffe, 2008; Pritchard, 2011; Gabriel, 2018).

Understandings of reality are created by individuals through everyday talk. Cunliffe (2008) proposes that meaning is created through spontaneous and responsive ways – through their interactions in everyday conversations. She discusses the dialogical approach to research, drawing attention to the polyphonic nature of dialogue in that ideas and realities are developed through the interactions of a number of different conversations. I will discuss the dialogical approach further in the context of the dialogical narrative analysis used in this research at section 5.6.2 below.

More generally however, in my research the social constructionist perspective opens the door to exploring the individual realities created by and with participants as they engage in their volunteering. Individuals have their own, and also collective, materially negotiated perspectives of this heritage steam railway, and about the responsibilities they are undertaking. I argue therefore that there is no ‘absolute,’ no one factual description of this (or any) heritage steam railway, and within the individually, socially and materially constructed context, each individual has their perception of how the position they have needs to be played out – not ‘should’ be played out according to a positivist stance.

In the next section I shall link the social constructivist paradigm to the ethnographic method adopted for my research.

5.3 An ethnographic approach

Having noted there are multiple ways to investigate the world of an individual (Burr, 2015; Cunliffe, 2008), and that it is the use of language in a social context that demonstrates an individual’s view (Burr, 2015; Cunliffe, 2008; Gergen, 2015), for this research a method that allows the researcher to investigate the use of language, and to get alongside participants in their day-to-day activities would provide the best opportunities to address my research question.

The ethnographic approach provides the opportunity for the researcher to get alongside, and close to, participants in their day-to-day activities. This approach has a focus on the ‘how’ and ‘why’ of cultures and environments by going out and finding about them (Maanen, 2011), with Watson (2011) pointing out that we cannot find out about what goes on in organisations without going out there. Ethnographers “seek to discover how things are really done”, Yanow et al., (2012, p.332), and dig deeper using “close observation...words spoken and practices observed” (Watson, 2012, p.16). Note that these quotes do not assume a single way or means that things are done or understood when approached from a social constructionist perspective, rather it is the rich variation that I aim to explore. It is only by being close to the participants that details of their stories can be understood and deeper narratives explored. To get close to participants requires the researcher to spend time acclimatising to the organisation and gaining the trust of the participants (Schwartzman, 1993; Hammersley and Atkinson, 1995; Griffin and Bengry-Howell, 2007; Watson, 2011). There are challenges to how ethnography might be undertaken in multi-site situations (Jarzabkowski, et al., 2015), and the different perspectives one might take towards fieldwork (Maanen, 2010) with the researcher having to make choices based on the understanding they have on the organisation to be researched.

Within the ethnographic approach, which is quite broad (Hammersley and Atkinson, 2019), the researcher has a range of tools available, and in the case of this research the tools chosen were the semi-structured interview, field observation, note-taking, and documentary support (Garthwaite, 2016; Hammersley and Atkinson, 2019). I was also a volunteer with the organisation, making the researcher an insider participant observer (Spradley, 1980; Labaree, 2002; Flinn, 2011; Garthwaite, 2016; Toraldo, et al., 2019) which made reflexivity even more important to this ethnographic study to help ensure the participants own voices are heard.

Overall, the research took place over the period July 2018 to July 2019 and I spent 57 days in the field at the three different locations. While on site I conducted semi-structured interviews with 48 participants, (four in a pilot study and 44 in the main study). In addition to these research activities, I was also present at other times during this time as a volunteer. Field observations were collected on pertinent occasions: when the researcher was a non-participant observer (not an active volunteer, i.e. on-site to undertake research), and when as a participant observer during times of my own volunteer activity (Hammersley and Atkinson, 1998). This duality of role reinforced more the need for reflexivity (Alvesson and Skoldberg, 2018; Johnson and Duberley, 2003; Wacquant, 2004. Hibbert, et al., 2010).

The decision to adopt an ethnographic approach was incorporated to the formal application for ethical consent within the University's ethical guidelines, and, as discussed in the next section, this proved a little more challenging than anticipated.

5.4 Ethical considerations

Conducting research involving human subjects is something that must be undertaken ethically to ensure no harm, physical or mental, is caused to the subjects or the researcher. Within the University's ethical guidelines and those of the relevant professional body, the British Psychological Society (British Psychological Society 2014, 2017), my request for ethical approval was structured to ensure that participants gave their informed consent to research activities, to minimise any potential risk to participants or myself, and to guarantee anonymity to participants. Two applications for ethical approval were made, the first for the pilot study and then a second for the main study. Ethical approval for the pilot study was straightforward as it entailed only four semi-structured interviews on one day, at a heritage railway different from the main study. The approved ethical consent involved advising potential participants of the purpose of the research, what was involved and requested them to sign a Consent Form jointly with me at the time of the interview. Anonymity was guaranteed and their right to withdraw made clear. The pilot study is explained in more detail in section 5.7.1 below.

Following the pilot study, the research question and approach were refined and reformulated and an ethnographical approach was determined as more suitable. Also, my, initial plan to work with three different organisations was refined over time to one organisation, three locations within that organisation.

This necessitated a differently structured application for ethical approval. My application for ethical approval was a little more complex than I anticipated as there was an unfamiliarity with the ethnographic approach amongst the reviewers. This proved to be an opportunity for some reflexive thinking on what I wanted to achieve in my research and an opportunity for some cross-departmental learning with valuable first-hand advice on ethnographic research being provided by the Geography Department. Written like this it seems fairly straightforward, however in practice it was not so and almost a year elapsed before final ethical approval was received. In particular, there was some debate around the expected protocols from a psychological perspective vs those from an ethnographic perspective. Mapedzahama and Dune (2017) and Murphy and Dingwall (2007) have made similar observations about the challenges of ethnography vs bureaucratic requirements of institutional ethical review processes.

A key ethical consideration was how potential participants and others who might find themselves inadvertently being observed could be advised of the research and what was involved. It was recognised that within ethnographic research it is not possible to continually alert potential participants to this possibility. Therefore, a broad approach was adopted to inform all volunteers that the research was taking place, providing details about myself and my aims. It was agreed that the Chair of the Railway would publish a piece about my research in the volunteer newsletter (see Appendix 4) and for copies of it to be posted on notice boards at all locations. Additionally, any volunteers who were included within a field observation were to be contacted immediately after the field observation and provided with an Information Sheet (Appendix 5) and requested to sign a Consent Form (Appendix 6). Should consent be withheld then their details within the field observation would be deleted.

As I also used semi-structured interviews within the broad ethnographic approach, the process for informed consent was devised so that individual participants would be provided with a detailed Information Sheet and a copy of the Consent Form (see Appendices 5 and 6), usually via email. This advised them of what to expect in the interview process**,** and to what they would be consenting. The participant and the researcher would both sign a Consent Form prior **t**o any interview, or other research conversation taking place.

Across the ethics review period a key issue for me revolved around participant observation in public areas and the unfeasibility of obtaining informed consent of all those likely to be in public areas. The resolution of this issue was important for the research as participant observation is central in ethnographical studies (Hammersley and Atkinson, 1995). Supporting participant observation Dyer (2006, p.96) notes: "Observation of behaviour in a public place, where it can be seen by anyone passing is generally regarded as unobjectionable…and even if the informed consent of individuals has not been obtained and as Griffin and Bengry-Howell (2007, p.24) note: "the researcher is in a relatively overt role with key participants, but may come into contact with many people who of necessity remain unaware of his/her activities".

I am also a volunteer with the host organisation and made the decision to be clear to the participants, and myself, about the roles occupied during my time either volunteering or researching. Whilst working as a volunteer I did not undertake any explicit research activities – conversations relevant to the research were avoided and no notes made of anything that occurred. However, pragmatically, to split what were in effect two separate identities is not totally achievable and undoubtedly there were some activities discussed or observed that might have encroached across the volunteer identity to the researcher identity, and this is another reason for engaging in reflexivity (Alvesson and Skoldberg, 2018).

All explicit research activities were undertaken on days when I was not undertaking volunteering activities – and research activity was scheduled specifically to achieve this. That when I was operating as a volunteer I was in a job requiring the wearing of railway uniform helped with self-identification, and my identification by others with the activity I was undertaking (Pratt and Raefeli, 1997). Given the multiple positions of the researcher, and the approach required of the insider participant observer, an essential part of the ethical consideration involved my engaging in a reflexive process throughout the research.

5.5 The research design

This section will consider the main issues in the research design. These are the choice of organisation in which to conduct my research, and of course its agreement to allow me to conduct the research; and then, given the ethnographical approach setting up the relevant methods with which to conduct the research.

5.5.1 Choosing the organisation

My ethnographic research took place over the course of one year between July 2018 and July 2019. The ethnographic data encompassed semi-structured interviews, field note records and organisational documents (Hammersley and Atkinson, 1995; Flinn,2011; Maanen, 2011; Watson, 2012). My research sought to explore how individuals construct their narratives for their identity, and to set it into the ethnographic context more broadly, the perspective offered by Watson (2012, p.16) expresses well the approach I adopted to the research design which entailed “close observation and involvement....in a particular social setting” investigating the practices seen and words used by the participants. The research method was designed to collect information through semi-structured interviews, field observation and documents, and took place over a period of a year during 2018 to 2019. Fortunately for me and this research all my data collection was completed prior to the Covid crisis.

The process of the wider search for a potential organisation for the main research involved a close inspection of publicly available information about the scope of the organisations activity, the roles undertaken by volunteers, and the scale of the operation ideally with a number of separate locations at which volunteers worked, as one of the aims of the research was to analyse whether re-creation of self-identity might differ between locations within the same organization. Ten organisations were considered, comprising: three museums, one castle, a National Trust property, two forts, a palace, a heritage steam railway and a cathedral. The heritage steam railway particularly offered most in terms of the range of activities undertaken by volunteers and the number of volunteers – around 800 and having several separate locations at which volunteers worked.

Having identified the sector, the choice of host heritage railways for both the pilot and main studies came next and there genuinely was a choice of heritage steam railways within a reasonable distance of my home base, with practical factors such as scale of operation, the likelihood of there being sufficient volunteers in my special category (managers) being in the organisation, home to research host distance and time, and the degree of ease with which I could obtain access to the organisation were factors. The pilot study required access to an organisation for only one day, and was going to be in an organisation that was not going to be the host for the main study. The host organisation for the main study was from the ten possible organizations considered, and was one at which I was a volunteer.

There also was, having decided on an ethnographic approach for the main study an attraction both personally and for the research process for the opportunities offered by insider participant observation, in that I might be able to identify some aspects that an 'outsider' might not see. (Spradley, 1980; Vinten, 1994). This approach is not without its risks as the insider might take for granted things the outsider might question (Spradley, 1980).

With the potential host organisations identified the first step was to seek to gain access. This typically involves identifying someone to be the researcher's 'gatekeeper', making contact and persuading the gatekeeper of the value of the research, maybe of value emerging from the research for the organisation, and gaining access. (Hammersley and Atkinson, 2019). The process of seeking a gatekeeper was undertaken twice, once for the pilot study and later for the main study. More detail is given in Section 5.7 below on the pilot and main study.

The research methods, as already noted involved a number of different activities which included semi-structured interviews, participant observation, making contemporaneous observations in field notebooks, the collection of various organisational documents. Each will be discussed below, with the caveat that for the pilot study only semi-structured interviews were used.

5.5.2 Semi-structured interviews

Semi-structured interviews were chosen as a method most suited to facilitate the quest for the collection of rich data drawn directly from participants, thus seeking to avoid what Duberley, et al. (2012, p.18) describe as "the tendency to reduce human behaviour to the status of automatic responses excited by external stimuli". The social constructionist paradigm invites understanding from individuals talking about and explaining their experience (Duberley, et al. 2012). From an ethnographic perspective, interviews allow the researcher to spend time with a participant to elicit ideas and information that would not otherwise be available through observation only. Semi-structured interviews avoid the approach of standardised questioning where the direction of the questions is decided in advance, somewhat akin to a verbal questionnaire, and unstructured interviews where perhaps only one question is asked to set the participant talking (Dyer2006).

Interview schedules were constructed through several iterations and review of the likely outcomes from the questions posed. The interview schedule (Appendix7) was initially road tested in the pilot study and then revised to provide a flexible tool for use within the ethnographic study, mindful of the variety of volunteering and volunteers. The interview schedules provided a framework that would be used with all participants in the study, but allowed flexibility to probe further for clarification or to pursue other issues that arose in an individual interview. It might have been wise to have created a list of possible prompts for probe or follow-up questions, but I did not and felt I could rely on my insider experience over some 15 years of volunteering to provide the probe questions within each interview. Not having a high degree of structure though allows opportunities for new perspectives to be narrated (Alvesson and Ashcraft, 2012).

I approached all the interviews with an awareness that knowledge arising from the interviews would be constructed from where both the participant and the interviewer were already positioned in their views of the world (Watson, 2011), and that my insider status could impact on how I and my questions were perceived by the participants (Alvesson and Ashcraft, 2012). This is both a potential strength and a potential weakness, and so including reflexivity in the process was important.

A short question schedule was prepared for proposed focus groups in the main study as this was perceived as a way of maybe getting more participant data, more participants and adding another dimension to the ethnographic approach, with multiple voices addressing the questions and providing another source of narrative (Frank, 2012; Riessman, 2008). In practice, in the field, it quickly became obvious that focus groups were not a viable proposition. Volunteers in number could not be released from their tasks, and pre-planning for focus groups would be extremely difficult as volunteers chose on which days they would be at the organisation. Early discussion with the gatekeeper made it clear that asking volunteers to come in on days other than 'work' days would not go down well.

5.5.3. Participant observation

It is suggested by Hammersley and Atkinson (1995) that the gap between interviews and participant observation may sometimes be hard to discern, and they also note that sometimes the ethnographer may choose to not ask questions of participants for reasons such as not wishing to lead the participant in any particular direction, or not being comfortable within a particular group.

The second strand of my research was participant observation. For an ethnographic study this is the key element of ethnography – the 'being there' (Pritchard, 2011). It is more than just being a presence on the ground, rather being there and being an observer of things done, said, of artifacts, of how individuals interact with each other (Langley et al. 2020). One example from field observation during my research might be how volunteers dress - some are expected to be in a sort of uniform which is prescribed in relevant documents, but since cost of the uniform dress is funded by each individual volunteer the result varies. For those volunteers working on the platform at one location there is also an ascribed status element to this uniform dress which is that silver or gold bands around the uniform cap provide ascribed identity (Ybema, 2020; Pratt and Rafaeli, 1997; Shefer, et al., 2018). I discuss this further in Chapter 9 - Results.

In the circumstances of this research, I could personally identify with the context of the research and with other volunteers, which addressed the comfort referred to by Hammersley and Atkinson (1995). Whilst interviews can be viewed as a part of participant observation, my approach set the interviews into one context and participant observation into another, although I must admit to there being an overlap, when for example I observed things said in interviews not actually being played out in day-to-day activities. For example, a participant told me in the interview he always 'talked to everyone (volunteers) on the platform', and whilst my analytical focus is upon the narrative used by participants, observation of him in ‘action’ suggested he manifestly did not talk to all the volunteers whose paths he crossed, thus creating a tension, for himself, other volunteers and me, of the mis-match between the words and actions.

Whilst the insider participant observer has familiarity with the organisation and some of the participants and thus potentially has insights that an observer unfamiliar with the organization might not have (Labaree, 2002), although Collins and McNulty (2020) propose being aware of the assumptions being made as an insider will enhance the researcher’s self-awareness. Spradley (1980) drew the distinction between being an observer, participating with the observed, and being an insider, with the ‘insider participant observer’ being part of the group and experiencing many of the same things as the group.

In this this study I was an insider participant observer (Spradley, 1980; Hayfield and Huxley, 2015; Garthwaite, 2016,), researching and volunteering to gain a richer, deeper understanding of experiences of identity construction in the organisation (Orr, 1996; Watson, 2008). A participant observer can, as Hammersley and Atkinson (1995 p.8) observe, by being alongside the participants “learn the culture and sub-culture of the people we are studying”. The researcher is there alongside the participants observing and noting, studying people in their environment (Watson, 2011, 2012). An insider participant observer (Garthwaite 2016) takes this one stage further and joins the participants in their activities, in Garthwaite’s case she joined the organisation as a volunteer to work alongside the participants. My position as an insider participant observer is slightly different in that I was already inside the organisation as a working volunteer before I started my research. I therefore started from a position of being familiar with the organisation and with some of the participants (Labaree, 2002), although unknown to most. I brought experience from some 20 years volunteering at another heritage steam railway. Being a volunteer made my credibility higher with participants, and I had the advantage of understanding how such organisations were run, the language and jargon.

It can be argued that being an insider participant observer is not always a benefit. As an insider the researcher must be aware of their status and engage in reflexivity (Alvesson and Skoldberg, 2000; Mauthner and Doucet, 2003) to minimise the risk of personal perceptions, attitudes and beliefs pervading both the data gathering and later the analysis (Labaree, 2002). As an insider participant observer, it is possible the researcher's understandings weaken the need to ask some, maybe seemingly basic, follow-up questions by assuming, for example, that the participant 'must' know something or be aware of it. A researcher less familiar with the environment might be inclined to probe the participant's story further by asking perhaps more basic questions (Hayfield and Huxley (2015). Likewise, the researcher being an insider might lead the participant to make the assumption that the researcher is more familiar with some aspects than is actually the case. In their consideration of the outsider and insider in research, Hayfield and Huxley (2015) observe this very point that the participant may have expectations of the researcher's expertise. Whilst considering oneself an 'insider' may be oversimplifying the situation as it is likely to be more nuanced as the researcher can be both an insider and an outsider simultaneously (Spradley 1980;

Hayfield and Huxley 2015; Bruskin 2019; Collins and McNulty, 2020). For example, whilst in my situation I may be an insider because of a familiarity with the operation of heritage railways, which may, or may not, be acknowledged by the participants, I also may have characteristics that make me an outsider to a participant – my gender, age, the heritage railways I am associated with, that I am heterosexual, married, with two sons, may make me appear an 'outsider' to a participant (Hayfield and Huxley, 2015). The insider/outsider positioning is complex, nuanced and is an area that requires reflexivity on the part of the researcher during the fieldwork and during the analysis. As Collins and McNulty (2020, p.208) point out the insider-outsider identity "must be perceived as tentative and dynamic (i.e. having the potential to change)."

Orr (1996) whilst researching technicians repairing photocopying machines described his practical experience as "both a boon and a curse" (p.8), as familiarity with the work of field technicians helped him gain trust. At the same time, that familiarity meant that he did not always note things that one unfamiliar with the field might have noted. It was almost certainly thus in my case too.

As Hammersley and Atkinson (1995, p.175) note: "Field notes are the traditional means in ethnography for recording observational data". Pointing out that writing field notes is not always a straight-forward simple process and often shrouded from novice researchers Hammersley and Atkinson (1997) suggest that writing them as close to the events to be recorded is beneficial as "the quality of their notes diminishes rapidly with the passage of time" (p.176). In my research, I made field notes in A5 notebooks as close to the event as possible, writing them wherever was feasible at the research site, sometimes on platform benches, in offices between interviews, in my car at the end of the day. My intent was to avoid the trap of allowing too much time to elapse and memory to be less sound, although I would admit to a few notes being made with a longer lapse of time than I would have wished ideally. During the research, I filled three A5 sized spiral-bound notebooks (convenience of size and use in the field) with chronologically making general notes and reflexive thoughts. I write more on reflexivity below, but I did find it valuable to sometimes, maybe when things had not gone as I wished, to have a period of reflexivity close in time to the event (Deggs and Hernandez, 2018). The notebooks are valuable in the writing up process to provide background to specific activities and events.

5.5.4 Documentary evidence

Documents can be used by ethnographers "as part of the social setting under observation" (Hammersley and Atkinson, 1997, p.158). There are many kinds of documents that ethnographers might consider from works of fiction to governmental reports (or are they both the same!), to letters, written instructions and diaries. Documents can yield meaning through the use of words and language, Lee (2012, p.599) observes that: "documents contain signs and signals that have to be interpreted", and that is done within the context of a particular culture. The ethnographer should ask questions about the document such as whether its source is reliable, is it complete or has it been edited, how plausible is it, and is the document supported by other documents? (Lee, 2012). Arguing for a broader perception of documents as a source of understanding Prior (2008) suggests that documents could be seen as actors in a network, and they may be studied in the context of "the function rather than the content of documentation" (p.833). This latter view sits quite well in the context of the research as the organisational network is complex and the function documentation produced not infrequently is to support the network of action that make the organisation operable. From my research, an example of documentation having function within an operating network could be that of a document entitled "Special Traffic Notice" circulated on a weekly basis to all the departments involved in the operation of the railway. A single small typographical error in this document can have significant impact upon the operation. On one occasion a train was indicated to arrive at Platform 2, so the locomotive crew, signallers and catering department organised themselves to achieve this. The typo was that it should have read Platform 1 because it was known the train would have several wheelchair passengers on board, and the platform staff could not get those passengers off the train on Platform 2 as the wheelchair access lifts were aligned with operation from Platform 1.

In this research documentary evidence was collected from the host organisation to provide additional insights into the semi-structured interviews and insider participant observation. Such documents include newsletters, magazines, formal instructions and notices, rosters, operational notes and some minutes of meetings

5.5.5 Reflexivity

"The subjectivity of the researcher is particularly prominent in ethnographic studies" Alvesson and Skoldberg (2018, p.245), and this is something of which I was particularly aware as an insider participant researcher. The researcher can affect the subjects of the research or be affected by the subjects and these can have an impact upon the research process (Haynes, 2012). Writing of reflexivity in the ethnographic context (Hammersley and Atkinson, 2019, p.17) observe “there is no way in which we can escape the social world in order to study it”. The ethnographer becomes a part of the social world being studied. As an ethnographic researcher into heritage steam railways, I was conscious of all that I brought into that social world from my own experiences as a volunteer on two heritage steam railways. I had pre-conceptions about how the railway’s Rule Book should be interpreted and tasks carried out, but I had already reflected that was only within my experience.

I was also aware that a part of my acceptability to my gatekeeper was that I had experience in heritage steam railways, and this was passed on to other volunteers at Country Railway through the article I wrote introducing myself. That created some expectations from my potential volunteers about me, what I might expect, how I might behave. This manifested itself when at the end of several interviews I was asked “Was that alright?” My response was to try to reassure them that I had no preconceptions and from a researcher’s perspective whatever they said was fine.

Observing that ethnographers can adopt a variety of roles, Hammersley and Atkinson (2019) note that the researcher may have to manage being at the margins – in one railway at which I research I may be perceived as an insider, in a railway where I am a volunteer my research background may make me an outsider.

Reflexivity may be found in the stimulation of awareness about “care and reflection in planning, interpreting and writing during the research process” (Alvesson and

Skoldberg, 2018, p.12). Hibbert et al. (2019, p.48) “regard reflexivity as a process of exposing or questioning our ways of doing.” For me in this research it involved continually thinking about what I was doing and how I went about it. In the field, thinking was assisted by writing field notebooks which provided opportunities to look at the thoughts and to re-consider them later. It involved me asking myself the question “Who am I” in relation to others. And, as I explore elsewhere, adopting a reflexive approach when events turned out to be quite unexpected.

Having discussed the overall methodology and the methods used in this ethnographic study I shall next discuss how the study was undertaken.

5.6 Analytical tools – thematic and narrative

This section considers the tools used to analyse the narratives collected from the participants. Two tools were utilised, thematic analysis to draw out the broad main themes occurring in the narratives and dialogic narrative analysis to gain insight into the identity work of the participants. I shall consider each analytic tool separately.

5.6.1 Thematic analysis

In this section I will consider thematic analysis and how it has informed my methodology and explain why I consider it relevant to the analysis for my research, utilising the flexibility available within thematic analysis and combine it with dialogic narrative analysis to create rich research findings.

In their seminal paper Braun and Clarke (2006, p.79) describe thematic analysis "as a method for identifying, analysing and reporting patterns (themes) within data", they also pointed out there was no clear agreement on this approach. Their paper was written from their frustrations about thematic analysis being mixed up with other analytical methods, sometimes not being considered compatible, along with a lack of transparency about methods used. They set out an approach to thematic analysis that was wholly qualitative in its approach (Braun and Clarke, 2019). In their widely cited earlier paper (Braun and Clarke, 2006), (according to Google Scholar cited 108,514 times – (Google Scholar 14 September 2021), clearly added substantially to the development of, and interest in, thematic analysis. It has been described as a "hugely popular analytic method" (Evans, 2017), and "ever present" (King and Brooks, 2018).

I shall not review the history of thematic analysis but will review some key issues relevant to my research and some of the contentions and challenges. A key issue for Braun and Clarke (2019) is that thematic analysis is *"fully qualitative"* (p.591) (italics in original) and does not make attempts to address quantitative research. This is one of the challenges for thematic analysis, and perhaps for qualitative research more generally with, for example, Labuschagne (2003) writing to try to convince quantitative researchers not to dismiss qualitative work. With coding (discussed further below) being an important element of thematic analysis there might sometimes be suggestions from positivist researchers to use numerically based approaches to coding to give 'quality' and 'validity' to thematic analysis, Braun and Clarke (2019) propose such demands be resisted.

Thematic analysis is a method for “reporting themes (patterns) in data” (Braun and Clarke, 2006, p.79), whilst King and Brookes (2018) see it as “identifying, organising and interpreting themes in textual data” (p.2), with Nowell et al. (2017) using much the same definition, and suggesting that “it has rarely been appreciated in the same way as grounded theory, ethnography or phenomenology” (p.2). Approaches to thematic analysis vary with King and Brookes (2018) preferring to refer to different ‘styles’ rather than ‘types’ of thematic analysis.

The aim of thematic analysis is to extract data from texts, such as transcripts of interviews. Thematic analysis is not attached to any particular theoretical framework, nor does it have any closely specified ‘how to’ approach associated with it (Braun and Clarke, 2006, 2019, 2020; King and Brooks, 2018; Nowell et al. 2017). This potentially leaves the researcher with freedom in their approach, but if thematic analysis is to be used as a method, then it is essential the researcher is transparent in their theoretical and epistemological approaches. I use the Braun and Clarke (2006) and Braun et al. (2014) six-phase approach to describe how thematic analysis might be utilised by a researcher, and Table 5. 1 below provides a summary.

Table 5. 1 The six-phase approach (adapted from Braun et al., 2014)

Phase	*What it involves*
Familiarisation	Read and re-read the data
Coding	Giving labels to relevant data
Finding themes	Collating codes and data and examining them
Review themes	Checking and altering if necessary
Define themes	Detailed analysis of themes, giving them a name
Writing up	Putting it all together

The six-phase approach was proposed by Braun and Clarke (2006) in the earlier paper and presented again in Braun, et al., (2014) with the aim of the approach to bring some guidelines to the method. Braun and Clarke (2006) made the point "they are not rules" and "it is not a *linear* process...more a *recursive* process (p. 86. Italics in original). The phases require the researcher firstly to become familiar with their data by reading and re-reading it. This appears to have been interpreted by some as reading the data twice, as Houghton and Houghton (2018) suggest "minimum of three full readings" (p.3522), which seems rather out of line with Braun and Clarke (2006) insisting the phases are guidelines not rules. Clearly though familiarity with the data is essential.

The second phase entails identifying and developing what within the text is relevant to the research and giving those items a code (a name), although Braun and Clarke (2021, p.5) suggest "there is not always a clear distinction between codes and themes". Indeed, this observation applies to my research, where resulting from detailed reading and analysis I identify and develop the key data as themes, not as codes. Whilst producing codes/themes is described as about identifying and labelling them, it is much more importantly about the researcher subjectively developing themes from the data (Braun and Clarke, 2021).

The third phase is to collate the codes, examine them in detail and understand what they mean for the analysis of the data and give them names as themes, producing a list of first-order themes. The fourth phase entails reviewing the themes to "refine, split, combine, discard" (p.189) as necessary for the analysis. The fifth phase is a detailed analysis developed for each theme with a title that explains the theme succinctly, rather than a one-word title. The sixth and final phase is the writing up of the analysis. I have described these phases in some detail, as I consider that in my description of the methods I utilised in this research, I have worked around the six phases suggested by Braun et al. (2014) although in a recursive rather than linear manner.

Having described a six-phase approach to thematic analysis, the six-phases might be described as generic within the options for undertaking a thematic analysis, choice from the different options depending on the researcher's judgement. Three types of thematic analysis are proposed by Braun et al. (2019a) who refer to them as 'schools' whilst King and Brooks (2018) refer to them as 'styles', these are shown in Table 5. 2.

Table 5.2 Types of thematic analysis

School/Style	*Key features*	*Source*
Coding reliability TA*	Partially qualitative. Codebook/coding frame. Looking for reliability and ability to replicate	Braun, et al., (2018)
Reflexive TA	Fully qualitative. Meaning as contextual. Reality may be multiple. Researcher subjectivity a resource. Themes an output.	Braun, et al., (2018)
Codebook TA	Between coding reliability and reflexive TA. Some themes pre-determined before analysis.	Braun, et al., (2018)
Template analysis	Coding template based on a sub-set of data. Inductive or deductive coding. A priori themes.	King and Brooks (2018)
Framework analysis	Good for teamworking. May sample data. A priori themes. Data indexed and charted into cross-referencing tables. Look for patterns and insights.	King and Brooks (2018)
Matrix Analysis	Matrices presenting data at a broad level. Useful for large studies. Detail may be lost.	King and Brooks (2018)

* TA = Thematic Analysis

Adapted from Braun, et al., (2018) and King and Brooks (2018).

The schools or styles shown in the table reinforce the observation that thematic analysis may be used in flexible ways, and researchers can utilise the approach best suited their research. The use of codebook, coding frameworks and coding templates occurs in most of the schools or styles mentioned, these are in essence listings of codes against which to match other data extracted from the text. The notion of a priori codes is that the researcher has ideas about codes that are likely to occur during the analysis. The one school that is different is that of reflexive thematic analysis (Braun et al. 2019; Braun and Clarke, 2020) and I will expand on this as this method is the one adopted for my research. I draw out the main points of Reflexive Thematic Analysis as identified by Braun et al. (2019), Braun and Clarke (2020, 2021) with Table 5. 3 summarising the main points.

Table 5. 3 Reflexive Thematic Analysis – the key points

Point	*Notes*
Fully qualitative	Nothing positivist
Meaning is contextual or situated	
Reality/ies may be multiple	
Researcher subjectivity a resource	Primary tool
Themes the analytic output	Requires time, distance, and space for reflection
Themes conceptualised by the researcher	They do not 'emerge'
Codes developed and evolve	Researcher interpretation
Follows the six-phase approach	Plus a lot of reflexivity
Writing up as the final stage of analysis	

Adapted from: Braun, et al., (2019), Braun and Clarke (2020, 2021)

In undertaking thematic analysis, it is essential that the themes are organised around a "central organizing concept" (Braun, et al., (2019), which in my research is of volunteers navigating the experience of becoming managers in a safety-critical environment. This provides the framework for the research and analysis and holds it all together, which is essential for the integrity of the research and the researcher. That reflexive thematic analysis is wholly qualitative does set up a need for the researcher to report the research in a manner which endeavours to ‘head off’ wherever possible challenge from those who might feel a need to see the research supported by quantitative data. The lack of defined criteria for assessing the quality of qualitative research was addressed by Hammersley (2007) who challenged the assumption that “clearly defined criteria of quality are already available for quantitative research” (p.287), and concludes that guidelines for qualitative research would be a useful thing but the “barriers to producing any set common guidelines.... are formidable” (p.301). In their paper addressing “trustworthiness criteria” for thematic analysis Nowell et al. (2017) proposed several criteria researchers could attend to, which include credibility between participant responses and the researchers reporting of them, audit trails and transferability.

Reviewing Braun and Clarke’s (2006) six-phase approach, Nowell, et al., (2017) propose triangulation between researchers, an audit trail of code development, documentation of team meetings, and more with the aims that “that the knowledge created can be put into practice” (p.3), that “(T)ransferability refers to the generalizability of the inquiry” (p.3). This might seem to miss the point of reflexive thematic analysis in that there would be some need to adopt some elements of a positivist approach, and it does not address the situation of a sole researcher, not working in a team. Perhaps I am being a little harsh as some of the concerns of Nowell et al. (2017) are addressed by the Braun et al. (2019) “coding reliability approach” (p.847) which both envisages the possible of multiple researchers and some calculation of the amount of agreement between different researchers.

The issue of quality in qualitative research was recognised by Braun and Clarke (2006) who were concerned by potential criticism of thematic analysis particularly around the flexibility of the method. They produced a "15-point checklist of criteria for good thematic analysis" (p.96), which was re-produced, unchanged, in Braun, et al., (2014, p.196). This was refined by the authors in Braun and Clarke (2020, pp.18,19) to a twenty-point checklist and addresses some of the concerns about lack of quality criteria, but does situate this set of criteria very much within one method. The checklist, which I have endeavoured to follow in this research, is attached as Appendix 8. Observing the checklist has been updated, Braun and Clarke (2020) make the important point that this update and their other writings on thematic analysis "reflects our *current* thinking, and things change" (p.19). Nothing is final; the point of any text or story is that it has potential to be revised (Frank, 2005).

In summary, in this section I have discussed thematic analysis as a method to make meaning from data drawn from individuals, set in a particular context, comes from people "telling stories" Braun and Clarke (2019, p.591) and is the output of the researchers' "immersion, thoughtfulness and reflection" (p591). The observations about "current thinking" and people "telling stories" to provide the data, links to my next section in which I review dialogic narrative analysis as the method I used in concert with thematic analysis.

5.6.2 Dialogical narrative analysis

In this section I consider narrative analysis, and from the approaches available I considered which best met the requirements of my research question.

Narrative analysis fits within narrative research, which itself is a contested field with "no automatic starting and finishing points" (Squire, et al., 2013, p.1). Narrative research may be split into three theoretical divisions – the telling of events taken place in the past; experience-centred based on happenings to the narrator; and socially constructed narratives that occur between people, Squire, et al., (2013). A much wider perspective on narrative research is taken by Lieblich, et al., (1998) who consider it "refers to any study that uses or analyses narrative materials "(p.2). In her exploration of narrative Reissman (2008) approaches narrative with "three nested uses of the term ... the practice of storytelling.... narrative data.... narrative analysis" (p.6). Frank (2012, p.2) proposes "asking what stories do, which is to inform human life". The common theme here is about people telling stories about things that have happened in their lives. Narrative research can be wider though. As Reissman (2008) observes it is not only the spoken word, but can also include documents and visual representations, and she re-iterates there is no one way to undertake narrative research. In my view this links well with the approach of Braun and Clarke (2021) that there is no one way to undertake thematic analysis, both require judgement on the part of the researcher.

In analysing the transcripts, I was looking for the stories that individuals tell to make sense for themselves, and for their audience, of past, present, and possible future thoughts and actions, and the background to that. "Stories breathe life not into individual, but also into groups" (Frank, 2012, p.3). Underpinning the stories are the narratives people use to construct those stories elicited from social relationships and culture (Smith, 2016). I use "storied data" (Smith, 2016, p.203) linking with and supporting the themes as data from which to investigate how individuals construct and re-construct their identities. I adopted the approach towards analysing narratives proposed by Smith (2016) to enhance understanding, by asking questions of the story. Table 5. 4. summarises the questions the researcher asks of the narrative.

Table 5. 4: Enhancing understanding of the narrative

Question	*Considerations*
Resource questions	Narrative underpinning. Experiences. Shaping the narrative. Constraints. Alternative resources not used.
Circulation questions	To whom are the stories told? Who would understand?
Connection questions	Who is connected/excluded to or by the stories?
Identity questions	Stories and narratives in developing identity.

There are two questions suggested by Smith (2016) that I did not use – about the body, and about function in the sense of how the narrative might lead to a "good life" (Smith (2016, p.219), as I considered they were less relevant to my research.

Each of the four questions was answered analysing each transcript and analysing and writing about each of the four questions. Drawing the together the threads of the analysis of an individual transcript I then wrote a discussion section.

Both the themes and narratives, with the words and phrases used by each participant as supporting evidence were noted separately, handwritten on a sheet, or number of sheets, which I named 'data sheets' for each participant. Some selectivity was used in this reading because some, mostly minor, parts of the transcript I considered not relevant to the analysis, such as when with interruptions. Another situation was where the participant was speaking of something not relevant to the interview, for example, four minutes were spent talking in detail about the visit of two passengers who had travelled to the railway from Doncaster (Interviewee 35).

Within each story in a transcript, the narrative resources used by the participant were given a unique identity in the form of a title to the narrative. My preference was to use a word, or words, used directly by the participant, to make the title reasonably self-evident and justifying the use of that title with supporting evidence. For example, a narrative resource used by several interviewees was around being a 'former railwayman' (Interviewees 1, 20, 38, 40). This was adopted as a narrative title supported by statements such as: "I loved it [working for railways] for 40 years", and "you can't train a volunteer to be like an ex-British Railways railwayman", (Interviewee 1). The participants' narrative resources and themes were brought together on the data sheet to create one overall set of data for the individual. So, for example, for the individual referred to (Interviewee 1), themes and narratives identified included: former railwayman, having multiple roles, being a team player, loves the railway, camaraderie. The results of the analysis are discussed further in Chapters 6, 7 and 8.

The next section explores the two studies carried out to address the research question. The first a pilot study, the second the main study carried out over the course of a year from July 2018 to July 2019.

5.7 THE STUDIES

Two studies were undertaken at two different heritage steam railways. The first at 'Clove Railway' was a pilot to assess the strength of the research design and the associated tools. After the pilot study changes were made to the research design. The second, the main study, was carried out at 'Country Railway' (both railway names are pseudonyms) over a period of a year re-designed to address the research question "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?"

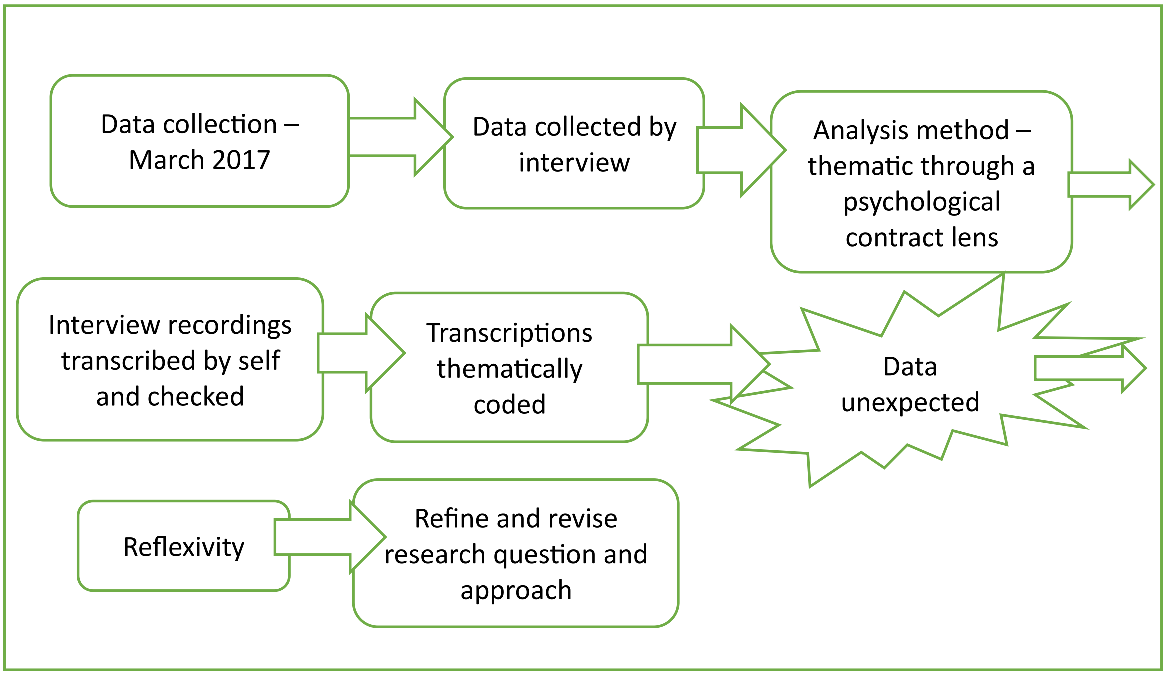
5.7.1 The pilot study – 'Clove Railway'

The pilot study involved discussions with a gatekeeper at 'Clove Railway,' identification of participants and the conducting of interviews took place in March 2017. At that time I perceived the focus to be a test of the interview schedule to establish whether the questions as designed were appropriate. With hindsight this was a too narrow focus and as Denscombe (2014) points out "the method should always be tested out in advance" (p.165) to check everything is working as anticipated, although one might challenge whether everything can be tested for reasons of time, practicability and the unknown issues that arise when the test is undertaken (Pritchard and Whiting, 2012).

Several things, described below did not follow what I perceived to be my plan – access via the gatekeeper, potential participants informed, participants identified, date for interviews set, and interviews conducted.

Figure 5. 1 below outlines the process of data analysis for the pilot study.

Figure 5.1 – Pilot study – Data Analysis - the process summarised



For interviewing in a research context Alvesson and Ashcraft (2012) suggest an approach starting with a number of open-ended interviews, and from those developing the interview schedule for the main study. My chosen approach, emanating from a career involving many selection interviews, but possibly less relevant for research purposes was to design a set of questions to gather obtain research data from the participants – the pilot study would test the effectiveness of the questions.

The pilot interviews were conducted at 'Clove Railway' where access had been obtained through my having a list of delegates who attended a particular Heritage Railway Association (the trade body) seminar. The attendees were all senior members of the railways. I selected a railway I had visited several years previously to discuss some issue (now forgotten) with one of the managers. The Chairman of that railway had attended the seminar resulting in me having access to his email address - this was pre-The General Data Protection Regulations 2018 (Data Protection Act, 2018). I emailed him, introducing myself, outlining the research project, explaining my ethical process and asking if I could phone him to discuss it. Having received a positive response, we discussed what I needed for my research – to interview a number of managers one-to-one about how they engaged with the process of becoming managers of other volunteers. After some thought, he agreed I could undertake the interviews. I emailed the Chairman my Information Sheet proposing he shared it with potential participants. The Chairman, as my initial point of contact with the organisation, became effectively my "gatekeeper" (Hammersley and Atkinson, 1995, p.64). The Chairman agreed to identify some people for me to interview, and a date for the interviews was agreed, although as it got close to that date it was changed by the gatekeeper to a later date.

As my connection with the heritage railway was only through the gatekeeper, and as I could free up only one day to undertake the interviews, I felt I was given little choice but to accept the change of date. This change of the date now meant there were fewer potential participants than had been proposed for the first date. An issue arising here was that of the gatekeeper's concerns about how the railway might be presented in the interviews, resulting in me being offered participants 'hand-picked' by the gatekeeper (Hammersley and Atkinson, 1995).

During the interviews, it became apparent that the gatekeeper had briefed each of them about his understanding of my research interest. However, unfortunately, he had misunderstood during our phone conversation, had not read the Information Sheet, nor shared it with the participants, consequently the participants had slightly different perceptions of what the interview would be about. The Information Sheet I had emailed to the gatekeeper to give to each participant had somehow not been copied for them. I gained the impression they had been told not to mention some particular issues, and to present the railway in a good light. This, I believe, is a situation where being an insider in understanding heritage railways generally, if not this one specifically, was a distinct benefit, using heritage railway-related language to re-assure them where necessary the interview would be confidential, as agreed with them individually on the ethics form that each read and signed in my presence.

As the interviews progressed some of the responses were not what I might have expected. I set this in the context the interpretivist and social constructionism paradigm against which the work was being undertaken, in that my own expectations could be considered irrelevant. In practice, I suggest, whether my expectations were irrelevant or not, it was the divergence of the responses away from the original interview and research focus that ultimately caused me much reflexivity and a change to focus my research on identity. The comment by a participant who said "I am not a manager – I'm just one of the lads," I found particularly thought provoking, as he did lead a team who successfully carried out technical activities, and he had prior paid work experience as a manager. It perhaps was a starting point in my thinking that led to the revision of my research question and a re-focus on identity.

A number of learning points emerged for me from this experience, some of which were unexpected and some perhaps with a bit more forethought might have been avoided. Some of the outcomes for me from the pilot study were rather similar to those identified by Sampson (2004), and included that unanticipated things can, and will, happen, that participants do not always come up with what might have been expected, and that whilst some things did not go as they might, mostly the pilot was successful and added to my learning. A further important understanding was that gatekeepers require some degree of management by the researcher to try to negotiate effectively to avoid what Hammersley and Atkinson (1995 p.66) describe as their “shepherding the fieldworker in one direction or another”.

Some other valuable issues that were identified from the pilot study included trying to gain some control over the venues for interviews - I was provided with a table and chairs at the rear of the railway’s cafeteria – which was a converted railway carriage. The interviews went ahead reasonably satisfactorily until people, both volunteers and members of the public, began to come in for their lunches, causing a two-fold reaction, a significant increase in the noise level, subsequently making it quite hard to transcribe the recording, and a degree of embarrassment to one participant who was the subject of some ribbing: “What you doin’ then?” by volunteer colleagues coming in for lunch, although the interview continued to a satisfactory conclusion.

The pilot study provided me with confirmation that semi-structured interviews in a research environment produced useful information from participants, making me confident to use that method again in the main study. Some of the issues met during the day are shown in Table 5.5. below.

Table 5.5 – Learning from the pilot study

Issue	*Example*
Gatekeepers controlling information dissemination.	Not distributing the provided Information Sheet to participants. And then giving participants their own version of what the research involves.
Gatekeepers controlling who is a participant.	Gatekeeper selects those who can present the organization in a 'good' light.
Gatekeeper making a late change of agreed date for interviews.	To match the on-site availability of appropriate participants. This became known to me because one of the 'preferred' participants was a no-show on the day and a substitute found who had not been briefed by the gatekeeper, but was aware others had.
The need to set requirements for venue to conduct interviews, therefore the venue is chosen by e.g. the gatekeeper.	By not specifying the venue offered was less than adequate in some respects. It met some requirement (seats, table, light) but was a cafeteria and at various times in the day was heavily utilised by customers.
Expect the unexpected.	The above and responses from participants, as mentioned above.

In the next section I shall discuss the planning, arrangements for, and the process of the main study.

5.7.2 The main study – 'Country Railway'

Using the learning from my pilot study, two things about gaining access as a researcher were different this time. Firstly, although I had not been a volunteer at Country Railway for very long, I had met one of the most senior members of the management team, and so was on 'nodding acquaintance' with him. Secondly, learning from the experience of my supportive supervisor (Pritchard, 2007) in "emphasising the positive aspects of my involvement" (p.104) to think about what I might add to the organisation, as well as my benefitting from access. As a volunteer I had heard mention of a project looking at issues to do with volunteers, although I had no details. Therefore, as the researcher seeking access to volunteers, a former HR Director and consultant and long-term volunteer and erstwhile Chair of different heritage railway, I wrote a short 'sales pitch' document. I sent this in an email to the Chair of the organisation, asking for access, offering help, and seeking a meeting to discuss this. Hammersley and Atkinson (1995, p.77) note that the researcher may be perceived by the gatekeeper as "the expert" or "the critic", and this might create complications in the relationship. In my situation, the perception of human resource management "expert" was made in the context of the work the organisation was undertaking 'looking at volunteers', and the potential "critic" was softened through being a volunteer, although one remains mindful that patience and diplomacy are part of the ethnographer's negotiating armoury (Mannen, 2011; Hammersley and Atkinson, 1995).

A meeting was arranged with the Chair of the organisation, which took place sitting on a bench seat on the platform at one of the stations, the outcome of which was that the Chair agreed to take my proposal to research and offer of help to the board of trustees to seek their approval. There was a slight catch though, in that within the overall organisational structure, of which I was unaware at that time, the Chair I had approached was one of three Chairs of three separate boards which made up the organisational structure. The separate boards were those of the preservation society, the plc and a trust – and the proposal would have to be considered and agreed by each. The positive aspect was that the Chair I had approached was also a member of the other two boards, the less positive was that having got initial agreement to the research fairly quickly the next stage took another three months to fit in with the various boards meeting schedules.

Eventually the agreement of all three boards was obtained and I had access to the organisation as a researcher. The next step which complied with the ethics approval (see section 5.4 above) was that I crafted a short article about the research and me (including a photograph) to be published in the volunteer's newsletter under the by-line of the Chair.

The potential participant sample was driven by the need to involve only those who managed or supervised other volunteers. Saunders (2012) in discussing sampling techniques refers to the researcher choosing the participants – except in the case of self-selection – and to heterogeneous purposive sampling as "what is sometimes referred to as 'taking a diagonal slice' through the organisation chart" (p.42). This pre-supposes the existence of an organisation chart and that a "diagonal slice" through it is relevant to the research. In my research it was more about deciding which potentially accessible parts of the organization might be relevant to my research, and creating opportunities to get close to and talk to people as part of the ethnography.

With a different perspective, Okumus et al. (2007), suggest that the gatekeeper may be the person making the selection of participants for the researcher, as was the case in my pilot study. In practice the situation is more complex and nuanced as my experience of undertaking this research was that the gatekeeper did not offer to identify individual participants, but instead on one later occasion led me positively towards a particular group of possible participants. Nor was there a well-laid out organisation chart to 'slice' through (there was no organisation chart as would be found in organisations with paid employees), and thus as researcher it was becoming difficult to identify possible participants. My objective was to obtain a 'slice' of participants from varying departments, locations, and seniority levels within the organisation, but achieving this was complex. I discovered individual departments did have some kind of list of their volunteers, although they were not necessarily kept up to date. However, my attempts to identify potential participants by this means came up against an even more significant obstacle which had just arrived on the scene – the General Data Protection Regulations 2018 (Data Protection Act, 2018). The impact of this was that the organisational holders of personal data – names, phone numbers, email addresses and home addresses of volunteers were legally obliged not to disclose that information to me.

Another issue that increasingly became apparent, transpired to be some supervisory jobs were in a sense 'invisible' because there was no official recognition of the managerial/supervisory activity in the job title –assuming they had a job title in the first place (Machin and Payne 2008).

Whilst I personally knew a small number of the volunteer managers with whom I worked as a volunteer, I needed access to a wider group of potential participants. The actual department in which they worked did not matter, the important issue being that they managed or supervised other volunteers. Two of managers in the department where I volunteered suggested the names of potential participants on the basis I would be able to speak to them face-to-face to invite their participation. Whilst two of the managers and a few other possible potential participants would be a start to my research, I needed access to a wider population.

After a discussion with the gatekeeper, I had a meeting with the paid full-time Personnel Manager about my need to contact managers, which led to the proposal that the Personnel Manager would email the managers on their "All Managers" distribution list with a message about my research drafted by me, explaining briefly the research, my need for unpaid volunteer managers to participate, and if they were willing to participate to contact me by email or phone. The email was duly sent. A very long silence ensued – in fact it has never been broken, not a single response has been received. After about four weeks silence, I spoke again to the Personnel Manager, and the response was "I didn't expect any replies – they never do".

It was therefore necessary to reconsider my approach to finding participants. To get the research under way I concluded that I had to start small, and hope that things would improve. Therefore, I invited three of the managers with whom I worked as a volunteer to participate, and those invited agreed. This initial selection sample could be described as purposive (Saunders, 2012) in that I knew they met the requirements for my research project and would therefore be a valuable source of data, and they might be able to suggest other potential interviewees I could approach – the snowball approach, (Saunders, 2012). In reality, rather than a planned purposive sample it was really a rather desperate move to get the research finally under way and whilst they met the criteria, I was concerned that my participants were not from a sufficiently wide base and looked for ways to widen it. The tension between researcher's agendas and individual situations in the selection of participants is reflected in the idea that "(S)election choices are slices of the reality around us", Reybold, et al., (2012, p.702). There was also the need to consider the positions held by the participants, in that they needed to be in managing roles, rather than the perhaps more usual formulation of concern about quantity (Reybold, et al., 2012).

At this stage each potential participant was spoken to face-to-face or phoned, allowing me to re-iterate the purpose of the project, thanking them for their offer to participate, and asking if they still wished to participate. If they replied in the affirmative, I provided several pre-planned dates when I would be able to meet with them. This proved another issue that is more nuanced than it might appear. From my prior experience of scheduling interviews in the paid work context, I had identified dates in my diary when I would be available to interview, with my game plan being to conduct as many interviews as feasible on each available day. Reality did not meet expectation for in practice out of 29 days originally allocated by me to interviews, on only nine did I manage more than one interview in a day. Thirty-seven interviews took place on site at Country Railway, two were by phone and five were at off-site venues chosen by the participant to meet the participants ability to keep the date scheduled but not at the railway. Once a date, and location, was agreed I then emailed them the Information Sheet and Consent Form, telling them that I would have a copy of the Consent Form for them to sign on the day.

I asked each interviewee if they could suggest someone who I could invite to participate, continuing the use of the snowball approach (Saunders, 2012). This proved successful and several further participants were identified and had to be approached face-to-face. The problem I faced was in trying to find participants outside the relatively limited work unit in which I volunteered. An issue here was that although there were some 50 volunteers in the work unit, only a small number had management positions, and their knowledge of managers in other parts of the organisation was very limited, or non-existent. I did consider going back to the gatekeeper to ask for introductions, but the disadvantage of this was one, that frankly I did not want to lose face and concede I had a problem, and two that I would then be dependent on who the gatekeeper chose to introduce to me. Gatekeepers have their own expectations of the research and the researcher (Okumus, et al., 2007) and as Wanat (2008) observes, gatekeepers can have concerns with public relations, what the report will say about the organisation, and the power of the gatekeeper impact upon field relationships. What I needed was a bit of luck!

And, indeed, luck came my way. Earlier in my first meeting with the gatekeeper a reference was made to a recently formed 'Volunteer Research Group' (VRG) and given my research interest, and human resource management experience I was invited to join the group, which I accepted. My first appearance at a VRG meeting I felt was not met with overwhelming enthusiasm by the group members, perhaps because they had been working together for a while and had established for themselves a way of working and understanding each other, so I trod carefully and for the first couple of meetings - I felt I was a 'non-participant observer'. The Chair of the VRG was a younger volunteer who amongst other things was also a locomotive driver. We had talked about my research, both formally as I introduced myself at my first VRG meeting, and informally after the meeting. I also established that he was not much enjoying being the Chair of the VRG. However, in the context of seeking participants for my research, it so happened that one day whilst I was volunteering, he brought the train he was driving into the platform for its next service. We greeted each other, engaged in small talk, and I mentioned that I was having difficulty in finding participants for my study. He immediately suggested that he invited me to the Annual Meeting of the Locomotive department, to be held in a few weeks time, to give a very short presentation about my research and ask if any of the attendees would be willing to volunteer as participants in the research. This serendipitous encounter opened a door to more participants (Jung 2013, Browne and McBride 2015).

That is what happened and the meeting was held on a Saturday evening with some 60 members of the locomotive department present. I made a short presentation about my research, asked if they had any questions and invited them to participate. Very gratifyingly 23 of them signed the pro-forma I had prepared, sharing with me their phone and email contact details. Saunders (2012) refers to this approach as self-selection with the researcher having little choice over the participants. This is correct to an extent in that the individuals self-selected and they self-selected against criteria set by the researcher. However, two points here and Saunders (2012) is partially right in this particular situation, the self-selection was from a group of individuals in a particular department of the railway, so the researcher did have some control here. This is somewhat similar to what Reybold, et al., (2012, p706) call “network sampling” where an individual or individuals in a network lead the researcher to other participants. The second point is I felt I had focused on the criteria in my presentation by, I thought, clearly saying I was looking only for people who managed or supervised the work of others – in practice meaning locomotive Drivers and Firemen.

Later, having set up interviews it transpired that a number of those who offered their participation did not meet my criteria. An issue with snowballing and self-selection sampling is that one may end up with a relatively homogenous group (Saunders 2012), which, in this case was what I wanted, but did not totally get. I made the decision the first and subsequent times it became obvious my criteria were not met to continue with the interview as I considered that to do otherwise could impact on my acceptability as a researcher, and as Hammersley and Atkinson (1995) observe things do not always go as expected in field research. As questions about their experience of managing other volunteers would not be relevant, I made an in-the-field decision during the first such interview to ask about the experience of being managed by other volunteers. This elicited a response, and I continued with this approach in similar circumstances, Denscombe (2014) identifies this flexibility to adjust questioning an advantage of the semi-structured interview. As I worked my way through interviewing the locomotive department participants, I knew I was still short of participants, and in particular trying to find participants at another location enable completion of the three-location analysis.

Whilst volunteering, I mentioned this problem of requiring further participants at a third location to the Station Master on duty, who suggested contacting a potential participant who was a Trustee, operational guard and also volunteered in the Carriage and Wagon workshop at a third location. The Station Master told me that it so happened that the individual concerned was in an informal meeting in the station buffet with my gatekeeper. I chose what I hoped would be an appropriate moment to interrupt, guided by my gatekeeper's non-verbal cues, and asked the potential participant if he would be willing to participate, received a positive response and his email address. This ultimately opened the door to the third location, and later, through snowballing, to more participants.

I still needed to enlarge my population of participants beyond those already identified and, again, to be an honest ethnographer, needed luck, more than careful planning. It came my way with the gatekeeper, asking me to present an update to the preservation board on my progress. He had I am sure, a sub-text as he suggested it 'would be important for me to have interviewed some more of the board', and suggested I ask for anyone interested in participating at the end of the presentation. He thought maybe one or two would volunteer. I prepared in much the same way as for the Locomotive department annual meeting, with a short presentation and took with me a sign-up sheet to capture the contact details of any possible volunteer. The positioning of my presentation of the agenda was set so that I would be able to get the few sign-ups hoped for without interrupting the proceedings for too long. On the day, I gave my presentation, responded to some questions and then asked if any of the board would be prepared to participate, and virtually all of them agreed.

There were two outcomes from this, one that the interview programme contains a disproportionate number of participants who are trustees. The second outcome was that as most of the trustees also volunteered in other parts of the railway, and so they also became gatekeepers and were able to able to open the door to other departments in the third location.

Eventually a total of 44 participants were interviewed. Of the participants, 38 are male with six female participants who undertook the same work as the males. With Country Railway having been operational for many years it is perhaps not surprising that 24 of the participants had been involved with the railway for more than 10 years, although it might also suggest that the railway provides a relatively congenial environment for those participants. This figure is not inconsistent with a survey by the National Council for Voluntary Organizations in which it is reported that 42% of volunteers have more than five years' experience with one organisation. (National Council for Voluntary Organisations, 2021). Appendix 9 lists the participants by the location in which they volunteer. Following the field work the narrative data collected required analysis, using the tools discussed in section 5.5 and the next section addresses this.

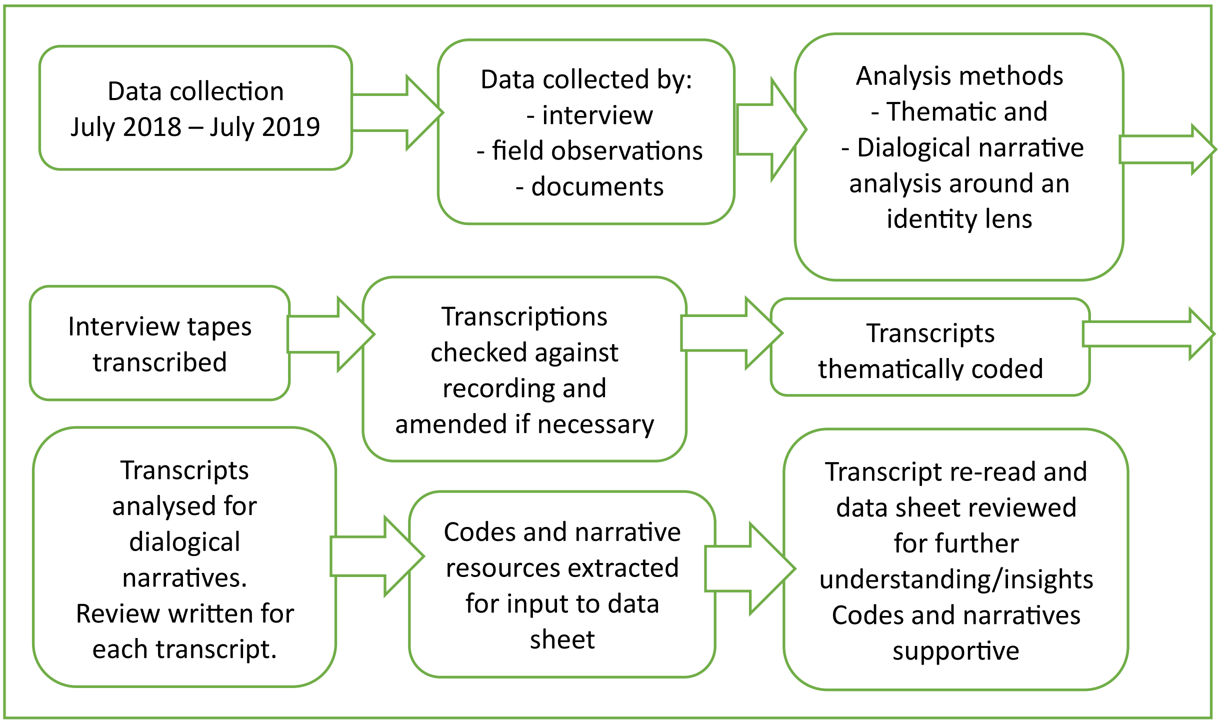
5.8 Analysing the narratives

Semi-structured interviews were chosen as a method as it enabled the researcher to ask questions and can probe responses. Other evidence collected in field notes can provide the opportunity to review understandings in the context of interview statements. Field notes were made over the whole period of the research: following interviews, when observing activities, after attending meetings and after periods of active volunteering. This is a little of a 'warts and all' exposition as my path through the analysis was not straightforward. I discuss the analysis in two stages, although both stages were concurrent as the analysis shifted back and forth as themes from the narratives developed.

5.8.1 Stage 1

My analysis was undertaken in two concurrent stages - first identifying the themes emerging from the storytelling and secondly using dialogical narrative analysis to identify the underlying narratives the participant used. Figure 5.2 below summarises the first stage of the data analysis process.

Figure 5.2 Analysis process – first stage



The participants were anonymised from the start of the interview process, by allocating each interviewee a sequential number and having no reference to their name. The only documents that had the signature of individual participants upon it were the Consent Forms and these were kept securely away from all other documentation. The researcher also held a table recording the interview number, date, location, duration of the interview, position/s held by the participant, location of the interview, when the interview had been sent for transcription and returned, a confirmatory tick that the interview had been coded, and this list did have names. This was always held confidentially on the researcher's security locked laptop and never printed.

Each interview was recorded on a digital recorder. The first nine transcripts were transcribed by myself, having used this approach for the pilot study. However, I found this a time-consuming task to which I felt unsuited, although Denscombe (2014) suggested that the researcher undertaking the transcription "brings the researcher 'close to the data'" (p.278) and helps provide a deeper understanding and connection with the material. I considered this proposition and concluded that for me the frustrations of undertaking the transcriptions were getting in the way of any deeper connection with the material. I therefore identified a professional transcription service to transcribe the subsequent 35 recordings. The specification given to the transcribers was to transcribe only the spoken word, with pauses, hesitations and so on not being noted on the transcripts.

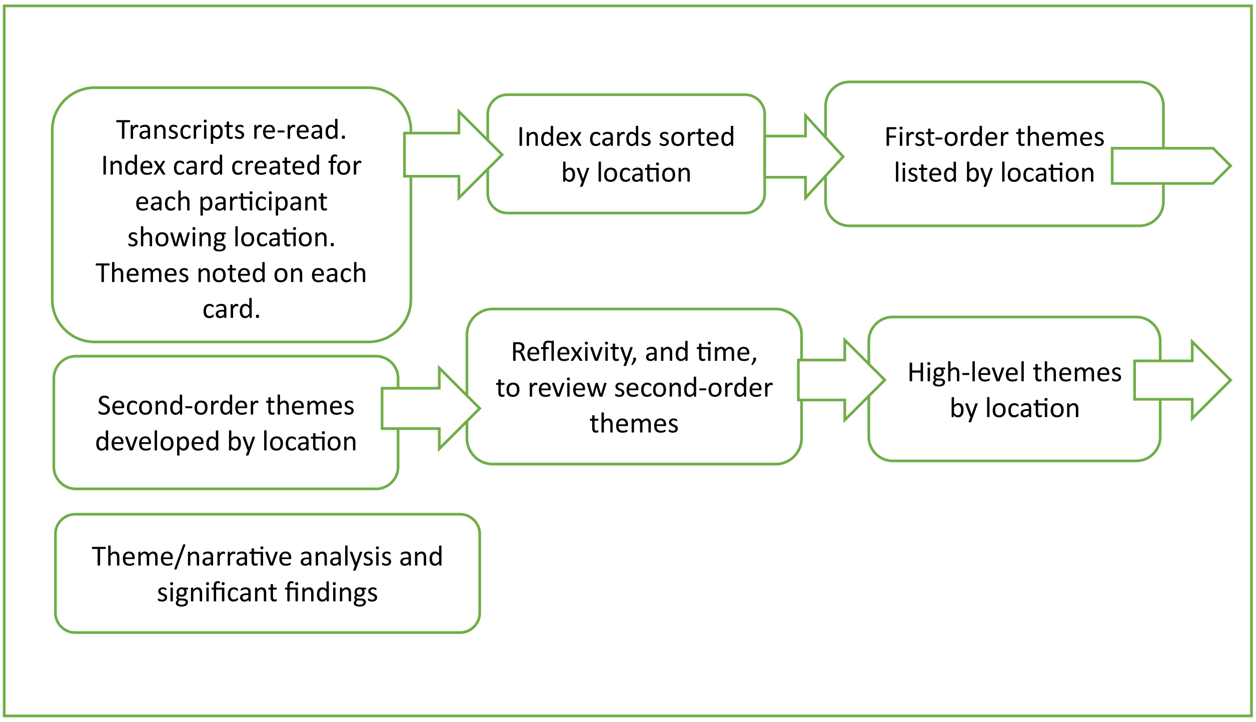
Each transcript was checked by listening to the digital recording and carefully and simultaneously reading the transcription for accuracy. Where the transcribers had mis-heard, mostly 'technical' expressions, they were corrected on the transcript. Once satisfied with the accuracy of the transcription I read it to make observations, by means of memos (using the Word ‘Review’ tool), identifying relevant points made by the participant as well as identifying points of inconsistency or contradiction. Sometimes transcripts were returned to, as another read later put perhaps a different perspective on the stories told by and earlier participant. However, no changes were made to the transcripts as each individual’s stories stood clearly as owned by the storyteller. I consider this issue of not changing the words used by the participant is important, as meaning may be changed even before the text is analysed, as Reissman (2008, p.124) notes: “there is little information on transcription methods – how talk has been transformed into text”.

Having read the transcripts, written in-document memos to note relevant issues and identified themes, each transcript was read again to identify the narrative resources the participant had used. The purpose here was to discover from the transcripts what Phoenix, et al., (2010, p.6) describe as the “whats and hows of the stories”. The researcher using this approach is sometimes described as a story analyst (Phoenix, et al.., 2010; Caddick, 2016; Sharp, et al., 2019) as it considers both the content and underlying structure of individual narratives. Beech (2008, p.68) suggests that “identity construction is the sum of a ‘set of meaning giving tensions’”.

5.8.2 Stage 2

The second stage involved further sorting and refining of the data by locations and themes. Figure 5.3 below summarises the second stage of my data analysis.

Figure 5.3 Analysis process – second stage



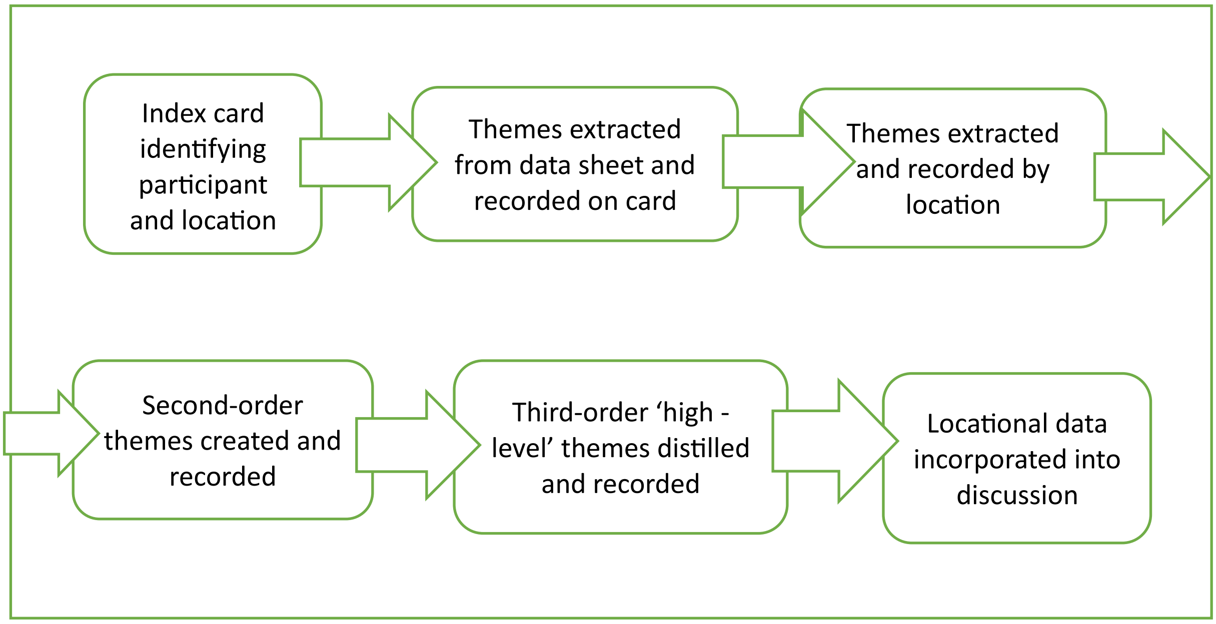
For the second stage of the analysis, I created a 6” x 4” index card for each participant, indexing the card with the number of the participant and the location at which they worked. Then, summarising both the thematic and narrative data from the data sheet- which I from now on I call only ‘themes’ - I recorded these on each card.

I make a slight digression here, as during the process of undertaking the analysis I was also developing my analytic skills and developing an understanding and practice of process. Two things stand out for me. Firstly, the analysis described in Stage 1 above was undertaken in reverse order from the last interview - number 44, to number 1. My justification for this is that much earlier in the research I had analysed interviews 1 to 8 with a psychological contract lens. That initial analysis was discarded in favour of one utilising the identity lens. I next analysed participants 1 to 5. However, reflecting on that approach, which at that point did not entail analysis of narrative resources, I concluded it was not working for me, as I struggled to make sense of the data. I re-considered my approach reflexively, and having decided upon the value of narrative resource, I started a third time using the approach described above. When starting the analysis again I felt I could not look immediately at the interviews that I had already twice attempted to analyse – hence I started with the last and worked towards the first.

Secondly, I have referred to making notes about each participant on sheets of paper and from those notes creating an index card. The first eight transcripts analysed entailed making notes on the data sheet, extracting relevant information recording it on the index card....and then destroying the sheets of notes. If 'pennies drop' then suddenly one dropped for me and it dawned on me I was losing a valuable resource that I had taken a long time to create – each analysis took around four to five hours. From this point on I made certain that I retained all the documentation I created.
To return to the analysis – having created 44 index cards I sorted them into the locations at which the participants worked. For those participants who undertook multiple tasks at different locations, this entailed a judgement about where to identify the prime location, and this was resolved by choosing the location at which the participant spent most time. For example, an interviewee who was a Trustee and a Leading Porter spent most time at the railway at location 2 undertaking the Leading Porter position (Interviewee 36).

Figure 5.4 below summarises the process I used to produce data from 44 participants to key themes for each location.

Figure 5.4 Developing high-level themes by location



The first sort of location themes was undertaken, extracting data from the index cards. The themes from the first card were put into a list with the source identified (by the participants number in a small circle) against the entry, followed by the data from the second card. Where an added item was the same as or very similar to a previous entry it was added alongside the first again with the participant being noted. This process was worked through for each location, and for example for Location A, 13 participants generated 84 first-level themes.

The second stage of the analysis entailed looking at the first-order data and carefully considering what it was saying in order to further refine the themes. This is a highly judgemental process and referral back to the data sheets and transcripts was useful to self-check and to make every endeavour to continue to report the participants own words and ideas. The simple idea, noted above, of ensuring the participant's identifying number was noted on the list of first-level themes was immensely helpful here. Using Location A again, the 84 first level themes were refined into eight main themes.

A third and final distillation of the themes was undertaken to identify the overarching themes from the data, involving much reflexivity and judgement on the part of the researcher. This was a task accomplished over several days allowing time for revisiting the original data as necessary. For Location A this final analysis developed seven overall themes; and only at this level of abstraction I felt able to very slightly change the terminology used to describe each theme to aid more general understanding. The themes and narratives are discussed in more detail in Chapter 9.

The decision to undertake an analysis by location within one organisation is novel in identity research and it was to explore whether there were likely to be significant differences in the high-level themes at different locations.

As the host organisation was a heritage steam railway the locations were initially identified as two of the railway stations, the workshops and it was anticipated initially to use the locomotive shed, where the locomotives are stored overnight as a location. The locomotive shed proved not to be the location the footplate crew narrated, but the locomotive itself was seen as the work location. A theme emerging during the interviews was that those volunteers who worked on the locomotives as operating crew perceived the footplate of their locomotive as their place of work, so the third location became the locomotive footplate.

5.9 CONCLUSIONS

This chapter has explored the methodology and methods used during this study. Using a social constructionist paradigm, I sought to explore how reality is socially constructed (Berger and Luckmann, 1966) and individuals construct and re-construct their identities in a specific volunteer organisational context. Through an ethnographic approach I sought to get close to my participants and find out what really happens (Yanow, et al., 2012).

There are several conclusions from the explorations in this chapter. A key one for me is that I experienced some substantial learning about crossing academic boundaries where challenges with an approach unfamiliar in one area of scholarship can be resolved by looking in a different area of scholarship.

The design of one's research is very important but in an ethnographic setting can be unpredictable and have unexpected outcomes. The research itself, by the nature of the flexibility in its design can bring about challenges and changes, and it is sometimes necessary to work with what is available and achievable rather than what might have one might have hoped for - more or different participants, different sample size (Adamson, et al., 2023) or different understandings about work locations.

The next chapters 6, 7 and 8 explore the results from the findings of the three locations identified in the analysis – the locomotive footplate, stations and workshops.

CHAPTER 6: RESULTS – THE VIEW FROM THE LOCOMOTIVE FOOTPLATE

Chapter 5 explained the methodology used to address the Research Question "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?" This and the two following chapters explore the findings from the research undertaken at the three different locations This Chapter will cover the volunteers on the locomotive footplate, Chapter 7 those volunteers who work on the platforms, and Chapter 8 those who work in the workshops. Each chapter considers three broad themes with more focused sub-themes to give the granularity this data deserves, and examine the complexities of identity construction within this particular volunteering context.

Chapter 6 is structured in the following way: section 6.1 presents an overview of work on the footplate and its management, 6.2 explores how the participants became volunteers in the first place, 6.3 explores how volunteers first start to engage in management activities, 6.4 explores how those in management positions become involved in multiple activities, 6.5 draws conclusions from the Chapter and Section 6.6 considers implications for the research questions.

6.1 Introduction: The view from the locomotive footplate

Working on the footplate can be demanding physically and mentally as a machine that can sometimes be unpredictable is at the head of a train filled with passengers, requiring constant alertness and awareness of safety issues. Those working on the footplate follow a hierarchically structured competency-based training programme taking a number of years to complete. Each person on the footplate has their own specific tasks, with some parts of those tasks overlapping with those of the person next up in the hierarchy. Thus, it is a team effort.

Managing on the footplate is a result of progression through the footplate hierarchy. Whilst progression is promotion in the general sense, on reaching the grade of Fireman some management responsibilities must be undertaken. The bottom grade, the Cleaner does not manage at all. The Fireman manages the Cleaner including on-the-job training, and the Driver is responsible for the overall management of the footplate crew, the locomotive itself and for the training of the Fireman. Training in this context is the practical on-the-job training required in addition to more theoretical classroom-based training.

Having by progression become a manager as a Driver or Fireman, a volunteer can choose to hold additional positions, perhaps within the Operating Department as an Inspector (assessor of the competence of another footplate crew) or elsewhere on the railway as a Signaller for example. An individual may also choose not to hold any other position. This Chapter begins with an exploration of how these participants began their volunteering with Country Railway.

6.2 In what ways are routes into volunteering navigated?

The three sub-themes in this section – 'The life-long enthusiast', the 'generally interested' and those who 'discovered volunteering' - explore the ways in which individuals narrate how they commenced their volunteering with Country Railway. As I explore later, these stories of different entry points reflect individual perspectives which influence the creation of volunteer identity and may have impact on subsequent managerial identity work.

6.2.1 The life-long enthusiast

In the Locomotive Department those analysed as presenting a narrative of being an enthusiast often expressed a love of steam locomotives from childhood.

> *"But I've always been a steam enthusiast. So as a kid, I spent my childhood around engine sheds, filthy, dirty engine sheds in London... So, I came down to*

the Railway and I went to [named] Station and there was a P class tank [locomotive] *shunting trucks. And I thought, wow, this is fabulous, I'd like to be part of this. In 1983 I passed as a fireman, so I'd got to that grade when I disappeared off to bring up family and I came back and thankfully started again in that grade. So, it was a fireman, like a senior fireman and then I carried on and here we are today, and I'm a driver." [11] [Driver]*

In this narrative, a childhood enthusiasm for steam was reinforced by a visit to Country Railway and by the ability to have actual practical involvement with steam locomotives with this participant's identity constructed as someone able to participate in something he loved. Elsewhere in his narrative he reinforces his commitment by telling how as a university student he cycled to Country Railway at weekends to volunteer in the Locomotive Department. His identity work shows pragmatism and a temporal aspect in making the decision to stop volunteering whilst bringing up a family, with a planned return to volunteering. Starting in the same position and grade he left several years previously would not happen in the current competence-based climate which would necessitate re-starting as a Cleaner, but because it occurred at that time it helped the re-construction of his volunteer identity.

Family often features as an important part in the development of a young enthusiast:

"We went on family holidays since I was tiny, and we always came here as a day out. I sort of grew an interest from there really. Just riding on the train and when I was about ten, we went on a ride to [Station] and a guy who was a Fireman said to me 'oh you seem interested, why don't you come for a footplate ride? So, at 10

years old I was on the footplate, sat on the Fireman's seat. We ran round the train at [Station] and I got off and I was absolutely buzzing. He said to me 'you seem really interested in this, here's some information about the [Railway Kids] Club, maybe you'd be interested in trying that. So, they left it with my parents and my Dad had a think about it as we lived a 100-odd miles away from here... And my Dad said 'well if you want to have a go at it, I'm sure we could take you down to see if you like it'. So, they brought me down, and once, that was it I was fixed and really enjoyed it. And then once a month between the ages of 10 and 17 my family brought me down and dropped me off, they went off to the beach or whatever and they'd come and pick me up in the evenings". [9] [Fireman]

Whilst introduced to steam locomotives by his parents it was the action of another, a Fireman, that provides the narrative here, offering a rare experience and following that up by drawing his, and his parent's, attention to opportunities provided for young people. This early identity work seems to have been reinforced by the positive actions of his parents.

A parent with an active interest in Country Railway provided the impetus for participant [40], a Cleaner, who narrated his start on Country Railway as:

"And it's actually through my family. My dad is quite involved with the railway and interested in railways and trains, and naturally, that progressed to me and also my younger brother, and that was it. We were hooked kind of thing.

I joined the [Railway Kids] Club, which is a junior section of the railway, at the age of nine, which you can, so you become a junior volunteer, worked my way up *through that. And at the age of 16, you can then join an operating department on the railway, and I chose the Locomotive department". [40] [Cleaner]*

He suggests that having a parent interested in railways is an automatic lead-in for children ("naturally"), which still he asserts as an adult. The idea of progression and commitment is embedded in his narrative both in the sense of his growing interest, and his activities as a junior volunteer ("worked my way up").

An enthusiast might not have started as a volunteer at Country Railway but somewhere else. Participant [16], who is a Cleaner, knew of Country Railway from an early age but began his youthful volunteering at a miniature railway:

"Yes, I've been coming here [Country Railway] since I was very little as a visitor......
Well, it started long ago. I started volunteering at a miniature railway. I started there about 13, 14 years ago now, so I was a real nipper then and as I've got older I've been able to do more and more duties...developed an interest in the engineering of things. When I got the paid opportunity here [as an engineering apprentice] at Country Railway, I thought well, it's no fun sitting here five days a week trying to fix them if you don't get up to go and break them as well. So, I signed up to go onto the footplate". [16] [Cleaner].

The participant presents an idiosyncratic account of his interest in being on the footplate but blending experiences and identities in working his way up the locomotive footplate ladder. Another participant with some knowledge of the locomotive workshop notes that apprentices are encouraged to volunteer to train for the footplate, so this may frame [16's] narrative account which offers an opportunity present himself in the interview as rather more agentic.

Stories of parental interest seem to account for commencing interest at a very young age:

> *"Through my father's interest in railways. I came down here to look at volunteering when I was about 12, and joined when I was 13. I'd been as a visitor here once or twice before that period. And the time before, I'd wandered around the carriage and wagon [workshops] and enjoyed what I saw and wanted to get involved. In fact, my mother tells me that when I was four or five, we came round here and I said to her, one day I'll work here. And she said, "no, dear, people volunteer here, it's not their job." And I did". [19] [Cleaner]*

The participant tells a story from his very early childhood as he recalls it recounted by his mother, to whom he attributes the explanation of the difference between employees and volunteers. His narration does not make it clear exactly how as a no more than 12-year-old he came to have "wandered" around a workshop. His enthusiasm initially was for what he first saw and his volunteering started in the workshops, becoming involved with the Locomotive department later in his volunteer career.

The enthusiast's story features interest in railways and steam locomotion starting at a young age with that interest being initiated and supported by parents. Some of the participants were involved in a special club run by the railway with a view to developing their interest into volunteering when they grew a bit older. Others simply became involved in ways that today would not be possible given current safety regulations. By virtue of the fact they became participants in this study as adults that initial interest continued.

The next sub-section will look at those who, whilst interested in railways and steam locomotion, did not begin volunteering at quite such a young age.

6.2.2. The generally interested

Those narratives categorised as 'generally interested' did sometimes have an early interaction with steam but that did not lead them necessarily to early involvement in volunteering. These stories differ from the enthusiast as participants seem to be quite measured in their later in life approach towards volunteering.

This participant offers that he always wanted to be involved but:

> *"It's something I'd always wanted to do. And, like so many of us, I simply didn't have time to do it until I retired. So, that's how I came to do it and then gradually eased my way into it as I came to the last couple of years of retirement. I started off as a track walker, which I did for about six or nine months. And then, I joined the loco department" [10] [Fireman]*

Having the interest but not enough time available to volunteer is mentioned by [10] and in his narration he implies his experience as being similar ("like so many of us") to some other, unnamed, participants. The identity work [10] was undertaking was thoughtful and structured as he followed a planned transition from full-time employment to volunteer.

Sometimes, the factors that act to turn a general interest in railways into practical volunteering might seem somewhat random as [12], a Cleaner, narrates:

> *"When I was younger, I liked trains. I always have, ...it was for one of my mate's 30th birthdays, and he likes trains, so I looked around to see if they [Country Railway] did [footplate] experiences, and they did a whole-day one. I said to my friends we could chip in. Get him that, and they usually do it with two people, so I could pay and come along and do it as well with him to keep him company. In the end, he had other plans, and it wasn't cheap. I just thought, why don't I do it for free? So, I came along, and they do a monthly induction around all the departments. I can't remember, really, what I wanted to do, but the one thing that… I obviously wanted to do the learning to drive steam trains, but I also wanted to do the workshop stuff....*
>
> *… And I remember that when I was a kid. I was like, I'd love to be that dude who goes down and does the coupling up and stuff. The next weekend, I was." [12]*

[12]'s identity work and creation of a locomotive volunteer identity relies initially on a chance opportunity which allowed him to build on his general interest in railways. In his narration he constructs the opportunity of being a customer with another on a paid footplate experience, and when that did not work out transferring the focus to himself and his (lack of) finances. He says he worked out he could get it all "for free", by becoming a volunteer. He relates that he did not know what he wanted to do but a little later introduces the rationalisation of a childhood hope turned into reality. Even if

it was a childhood hope his story tells that he did not initiate anything to achieve it until later in life.

Becoming a volunteer at Country Railway may be an extension of prior general interest and experiences with steam locomotives. Participant [14], a Cleaner, has the interest and experience and seems to have joined as a volunteer to be able to exploit ambitions which he says he has not achieved elsewhere:

> *"I'd been involved with the mainline steam locomotive since the early 1990s and I did footplate experience courses. I'd done quite a few of those. And I really wanted a chance to get hands-on experience with locomotives. And it was really a toss-up between Country Railway and [another railway], in terms of distance. But I've always been attracted to Country Railway. It seems a happy line and there's a lot of positive things about it and I've not been disappointed. ..... I'd specifically volunteered for the loco department because of past experience. I'd been a support crew member with [named locomotive] for nearly 20 years, so yes, I'd got quite a lot of experience of steam locomotives" [14] [Cleaner]*

This tells of a convoluted, and delayed, path to the locomotive footplate. His narration offers that he has been interested in steam locomotion for a long time having undertaken a number of 'courses' which are paid footplate experience events. He also tells of being a member of the support team of another locomotive in its travels over the main line.

His twenty years as a member of the support team did not provide the opportunity to train as a fireman. His narrative demonstrates agency in seeking out potential railways to accept him into their locomotive department, perhaps rationalising time spent travelling to and from the railway as one factor in his decision making.

The theme of involvement starting through parental actions recurs in the narratives of several participants although, unlike the enthusiasts in the sub-section above, action occurs later in life. [13], a Fireman, explains how her interest started:

> *"A very circuitous route. I grew up being hauled around, traction engine rallies, steam, vintage fairs, every narrow-gauge railway in North Wales and anywhere else with my dad. And absolutely just have a very, very strong emotional connection to the steam engines.....But never perceived as the opportunity of volunteering at all in a way that I wanted to. I've made inquiries, and I've been offered volunteering with kitchens, or making the tea, doing the sandwiches.*
>
> *And I want to play with fire and paraffin and steam. I moved coincidentally, to [somewhere near Country Railway] about seven and a half years ago. And my next-door neighbour came home one day wearing blue overalls. And I just said to him, where have you been, what you've been doing? And he said I'm a senior fireman at the [Country Railway]. And I said to him, 'Oh, in another life, I would have loved to do that.' And he said, 'why don't you?' And just simply him asking me that question, I realised that I had decided it was impossible. I was 40 plus by then. Five foot nothing and female. I had decided there wouldn't ever possibly be any role. I haven't got the muscle..... And he just said to me, I'm running foreman on Sunday, get a pair of safety boots. Come down, have a play in the pits, see what you think of the yard work. And if you can do some of the stuff that we do in the yard, you can work on the locos". [13] [Fireman]*

This rather long extract is included because the identity work undertaken by participant [13] is significant. She reports an opportunity she had identified as never going to occur was suddenly opened up through a chance conversation. She tells of a long-standing emotional connection to steam which had never got beyond the stage of being an observer, was unexpectedly presented to her as an opportunity to be fulfilled through practical volunteering. Reflexively, she considers she had constructed an identity in which working on a steam locomotive footplate was not a possibility. In her narrative she talks of some issues that she identified as barriers, such as age, height and strength, along with being female. She narrates having had the experience of offering herself as a volunteer (she does not say to whom) and being offered catering positions.

Her narrative is strongly influenced by the words of another who, reacting to her assumptions she could never be a Fireman, constructs an opportunity for her to challenge her identity. She takes it up and whilst the full story she tells in the interview has some rocks strewn along its path she does become a Fireman, and she tells:

"Passing my firing test was the proudest, proudest day of my life". [13]

In the previous sub-section the part of parents in initiating interest in steam locomotion was addressed. A unique parental experience is narrated by a participant when she was introduced to Country Railway, and other railways by her father. In her narration [23] says that her interest in the locomotive footplate developed from a fairly early age but that she did not originally come to Country Railway to volunteer as an enthusiast.

> *"We* [herself and her sisters] *used to go to the Railway with my dad when he started running footplate experience courses there [commercially]. And it wasn't something that we particularly wanted to do, but originally we went down with him just for something to do at the weekend, when he went, we had to go as well, we didn't have a choice. It wasn't a conscious decision, but we went down every weekend with him when he went there to work and we did our own little bit there. When he ran the courses, we'd get up in the morning, clean the engine, travel in the brake van, talk to the course members.....probably when I was about 15, we met up with some other young people there,... We got talking to them, got involved". [23] [Driver]*

The seed of early interest in railways as delayed or being put on hold for a very long time is a recurring theme across these narratives of general interest. Here it is offered as circumstantial, as just being there and eventually getting involved. Through these narratives participants work up a variety of factors as they (re)construct a volunteer identity. [34], a Cleaner, who when interviewed was about to take his test for promotion to Fireman, had volunteered for six years having had a working career, not with railways, with different organisations finally coming to Country Railway to fulfil a long-held ambition.

> *"Well, it's a boyhood yearning to be on the footplate of a locomotive. Plus, I know I'm in my 70s now, but I'm fit and able and I've always done things where I want to prove myself. And I want to push myself to the limit. And I think I can do it as long as I've got ability to contribute and I want to push myself to the limit and do what I can. If I can't do it then I will give it up". [34] [Cleaner]*

In his narrative 34's identity work has kept the early 'yearning' in the background through his working life as other matters, work and family, were prioritised. His volunteer identity includes things drawn from previous identities ("always... want to prove myself"). He offers that what he wants to do is challenging his limitations and that there will be a time to stop. An interesting point made in his narrative was that within his identity constructions, for factors he did not explain, whilst he has made a positive choice to volunteer at Country Railway, he lives more than a hundred miles distant and commutes to do his volunteering, staying in the locality for four or five days at a time.

This sub-section has explored some of the differing ways volunteers narrated how an interest in railways developed early in life, but the transition to volunteering at Country Railway was presented as delayed and did not take precedence over their other activities. These participants brought a mixture life experiences which preceded their interest in volunteering at Country Railway, and, as I explore later, had some influence on their approach to managing others when the time came for them to engage as managers of other volunteers.

6.2.3. Discovered it

Whilst having a keen interest in railways often seems to be a starting point for volunteering, others narrated how they began volunteering from apparently less strong interest.

> *"My parents decided they wanted me out of the house. Anyway, then one Sunday Mum and Dad said 'Oh, we'll go out to lunch', this was in February of '74....... And this was very unusual. I mean, people didn't often go out to lunch. Okay, we'll do*

that, and then it was, 'You're interested in trains, why don't you go and work at Country Railway?' Well, I suppose I could. And, well, I was re-sitting an O-Level and I said 'Well, perhaps I'll get this O-Level out the way.' 'No, no, we think you should do it now. Why don't we go out there this afternoon?' So, I enrolled and I started work the following week, and I came in every weekend for six years......had an interest in railways, whether or not I even eventually gravitated here myself". [15 Driver]

In the story narrated by [15] he appears to distance himself from taking the decision to volunteer at Country Railway as a teenager. The story relies on the actions of others, of the narrator's interpretation of the thoughts of others and at a great distance in time. That his parents allegedly did not want him to re-sit a failed O-level is maybe a defence to protect his identity from any negative aspects of not getting a school-level qualification - he removes the responsibility to others. The story does not explain why taking him out for lunch as a family was necessary, but this might be to create an emphasis on the importance of the event within his identity construction. Despite not taking ownership of the original decision to become a volunteer he says he is thankful to those who made it for him:

"I'm eternally grateful, because just about everything that I am today is as a result of coming down here." [15] [Driver]

Here [15) offers a significant outcome to becoming a volunteer. In doing so he suggests that this goes beyond a volunteer identity into other identities in all parts of his life, although further explanation is not provided within the narrative. Some perspective might be put on this by something said later in the interview about his paid work:

"And I've always identified, you know, work has always been secondary to me." [15 Driver]

The decision to start volunteering may be delayed whilst an individual spends time thinking about whether or not to do it – maybe procrastination delaying or deferring any positive action.

"I'd thought about it for a while, but I didn't actually drive [a car or motorcycle] when I used to think about it. And then there was a volunteers' weekend and so I thought I'd come to that, and came the first day, which was a general tour, then there was a specific loco department tour the next day. And thought, well, if you didn't start immediately volunteering, then you'd think about it and then probably forget about it, so then I started coming most weekends after that". [18] [Cleaner]

In his narration [18] attributes his initial lack of action to becoming a volunteer to being unable to drive to Country Railway. Later, when he could drive, he tells of an interest developing, and he recounts he thought he would "probably forget about it" unless he immediately started volunteering. He used his agency for taking action and engaged in identity work to avoid what he recounts as a known barrier to action. The solution he recounts was one of intensive volunteering activity but why he opted for that is not explained in the narrative.

Filling under-utilised spare time as well as finding new friends might be a reason for volunteering. This reasoning could be made by someone older and retired but it can also apply to someone much younger, as with this participant who was in his early twenties:

"In 2003 I was living in the first flat that we bought. It was a very small place and I was doing shift work at the time, so I had quite a bit of time off when my friends wouldn't necessarily be off. I'd find myself at a loose end 'cos my wife was at work and I was just kicking around in a small flat with no garden or anything to tinker with, so I just came down here once, visiting. I've always been interested in it, but I wasn't like an enthusiast as it were. I wasn't someone who read the magazines or anything like that, and I just thought 'Oh maybe I'll have a go at that'. So, I just rung up the office and said I want to volunteer on the engines and they just sent me someone's name. I contacted him and that's how it went really. It was really just to have a look; it wasn't something that I'd always intended to do. It was just something that came up. Went on the website and saw that you could volunteer and that was it." [8] [Driver]

His narrative and construction of identity resists the idea that he was an enthusiast for railways generally or Country Railway specifically. There are a number of factors at play in his identity work: being bored, the unavailability of friends and his wife caused by his shift working hours. A chance viewing of Country Railways website initiated some action which he does not present particularly enthusiastically. He almost distances himself from volunteering ("It just came up") and creates an identity of someone just following up on anything to fill time. It is possible his narration has been constructed to tell the listener he never really intended to get deeply involved.

A long working career in the railway industry does not necessarily lead to an initial interest in volunteering on a heritage railway.

"A friend of mine at work was already a fireman [at Country Railway] and I was invited along to join him and his driver on an engine one day. Having done that

day I realised, you know what.... I retired this year. I'd done 30 years as a train driver and doing a day on Country Railway was like this is what I missed about the big rail because the big railway changed out of all recognition. I hated the job when I finished. I didn't hate driving trains, I just hated who I was working for and all the things that you had to do that I didn't feel were necessary... But Country Railway, you're doing vacuum pipes, and screw couplings and going down and messing about and it's a steam engine. I always liked steam engines. That appealed to me and I thought, do you know what, this is what I've been missing for the last 20 years at work so I'll have a bit more of this. So that's what kicked it off really". [21] [Fireman]

Having responded to a chance invitation from another, the participant narrates identity work involving re-constructing what he said were his long-held ideas of what working on a railway should be. The context of his 30-year career as a main line train driver (on big rail) had changed over time and he relates an unwillingness to accept some changes, some elements of the environment and the impact on his identity. Here he works through that his dislike of his paid job did not relate to train driving but to the context. With his introduction to Country Railway he found something that would enable him to begin re-constructing his identity and would fill gaps in past identities and blend with new elements to create a new identity.

Sometimes the impetus to volunteer comes from several sources, which might be another or an object such as a particular steam locomotive. Participant [25] had seen a particular steam locomotive as a child and an opportunity arose to see it again.

"Well, it wasn't something that I'd thought of for any length of time. But the Flying Scotsman came down [as a visiting locomotive to Country Railway] and because I'd met the Flying Scotsman when I was a small child and I wanted to see it again. And I got tickets for myself and my husband, I convinced my husband that he ought to come and see it because really I wanted to see it.
So, we did, we had a wonderful day here and they had the replica, the smaller one in the railway yard. And I was invited onto the footplate of that. I had to fold myself up to get into it. And I think that was it really that clinched it for me. My husband had said, 'You know they want volunteers here don't you' and I'd said to him, 'Oh, I'd love that, I'd really love to work somewhere like this.' He said 'Well why don't you volunteer?' So, I did and it was the best thing I ever did." [25] [Cleaner]

Participant [25] narrates how she responded to an event organised by Country Railway to re-visit a childhood experience. The opportunity of seeing the locomotive and going on the footplate of a small replica locomotive sparked her enthusiasm again. When that was supplemented by the opportunity to volunteer on the footplate of Country Railways locomotives she became a volunteer. Her identity work involved re-construction from someone with a very general interest in a particular locomotive to someone who could achieve something she had never previously considered possible.

This sub-section has looked at the starting of volunteering at Country Railway by participants whose narratives tell of becoming a volunteer as a previously unconsidered or maybe a long-delayed aspiration. A regularly occurring issue is the involvement of another, who was not actively involved in seeking volunteers on behalf of the railway, to initiate an action that led to the subsequent volunteering.

The three sub-sections above illustrate the complexity of decisions offered by participants to become volunteers on the locomotive footplate. With the different starting points to their volunteering, participants also explain how they might bring different perspectives of what volunteering might be. Those perspectives are all likely play a part in how the individuals use identity work to re-construct their identity when taking on new responsibilities. Simple explanations of how individuals begin their volunteering will not suffice. This analysis has had to distinguish between the overly simplistic and the over-complex to achieve the granularity shown in the participants' narrations.

The next section will explore how participants became managers, although, as has already been mentioned, volunteering on the footplate produces a specific promotion route to management.

6.3 What are volunteers experiences of becoming a manager?

This section will explore how individuals tell of moving to positions in which they manage other volunteers. As already noted above progression through the footplate grades leads automatically to positions in first-line supervision as a Fireman and management as a Driver.

6.3.1 Goes with the job/Part of progression

The training process for the footplate is structured and unless an individual decides to halt their progression at the Fireman level then progress, subject to demonstrating the required competence, to Driver follows. Alongside the skills of driving a locomotive goes responsibility for the footplate crew. Participant [8] narrates how he sees the responsibility:

> *"Very much so once you're a Driver but also when you're a Fireman, but a Driver more so. You've got to be acutely aware of the people working under you and they've all got different abilities and steam engines are dangerous, ... So yes, it's quite a position of responsibility being a Driver. The driving part I'd say is 20–30% of it, it's keeping everyone safe." [8] [Driver]*

The Driver here is narrating his awareness of the responsibility, and his estimation of the proportions of the job that focus on either the technical skills or people management, with him deciding that safety awareness and people management are significantly the most important. This Driver has noted an awareness that those on the footplate may be at different points in their experience having differing levels of competence. The identity he reflects upon here is one where he seems sufficiently confident in his own technical competence and tries to show his listener that he is alert to the needs of others.

Successful progression through the grading system is recognised as leading to a driving position, although sometimes the achievement of that top position was not the goal.

> *"I always wanted to be a locomotive Fireman. I used to look at locomotive firemen when I was a train spotter and I used to think, I would love to be doing that. And so I came down here, I worked my way up. And then almost you can't stop, can you? You know, you kind of carried on, carried along with this promotional thing. And it makes sense, so I ended up as a Driver. And I have to*

say, now I love it, so it's good, but I never aspired to it. I aspired to be a Fireman, but you can't stop, you know." [11] [Driver]

In this narrative [11] is saying that the Fireman position was his ambition but he implies that, somehow, once started along the progression route there is some kind of impetus to become a Driver. He does not attribute this to himself only using "you" to imply that he and others experience the same thing thereby justifying the continual progression as part of his identity. He justifies continuing the progression up the ladder as both making sense, without explaining what that means to him, and by concluding that it was the right thing to do beyond his initial ambition. He reflects upon the responsibilities of a Driver:

"As a Driver you're a leader and you've got a very significant safety responsibility. You've got to be very disciplined, so you've got to be prepared to be disciplined, but a leader, not a boss. Bottom line is, if I say, do that, do that, because we're heading for a brick wall." [11]

He also narrates his identity as one with significant safety responsibility and then reflects upon his perception of being a manager as "a leader, not boss" but does not elaborate. Having presented himself as a leader he says he is also prepared, when he considers it necessary, to be directive ("if I say do that, do that"). How these differing approaches play out in practice on the footplate is not explained. Elsewhere in his narrative he puts his leadership/boss dichotomy into a rather different context when he explains how previously he undertook change activities in other parts of a (mainline) railway as his paid job and sought to involve the workforce whenever possible. Through this he suggests that his previous identity work in a safety-critical environment has informed his identity work as a volunteer in circumstances where safety is a prime concern.

However, managing on the footplate can be approached from a more control-based stance:

> *"But when you get on the foot plate as a Driver, you're in charge of the engine, you're responsible for managing the running of the train, you're responsible for what the fireman does, so if I tell the Fireman he's got to put water in the boiler, this isn't a stuffy forum for discussion, he puts water in the boiler.... it's safety critical and, you know, the wellbeing of the engine and everybody on it depends on people carrying out their duties properly. And the Driver seeing that it's done." [15] Driver]*

Here [15] has constructed an identity as a Driver in which he has control over the activities and the individuals on the footplate. He is in charge, knows best what needs to be done, watches everyone and expects his instructions to be carried out without question. It seems he is unprepared to listen to views that differ from his own and the 'stuffy forum' analogy perhaps refers back to his (narrated elsewhere) past work experience that included being involved in negotiations, which were perhaps long and inconclusive. This suggests that he may want to be clear on how his volunteering role is different and more directive.

There is a theme in the previous three stories of identities that the participants suggest they are prepared to micro-manage on the footplate – reflecting the safety-critical nature of the Driver's position. The Driver is always the person in charge and the decisions they make can be crucial to the safe operation of the locomotive. Their stories seem to account for a limit on how for far they are prepared to delegate that responsibility – if they ever do, for their stories tell of watching closely over the activities of their crew.

The management position of the footplate includes training future Cleaners and Firemen and provides some opportunity for interaction.

> *"... I wouldn't say I was a brilliant people manager, but I think I'm better than some I like to think. I've picked this up from when I do training you give them feedback by signed form. They've got a chance to comment and sign the form." [26] [Driver]*

[26] reflects on his ability as a people manager and as a trainer proposing he is "better than some". He does not say what this means or what benchmark he might be using. The training process requires an individual's competence development to be formally recorded, hence the reference to completion of the form. He gives a clue as to why he sees himself as a better trainer when a little later he says:

> *"I suppose that comes down to people management. You don't just tell them to do something; you try and explain." [26] [Driver]*

The suggestion seems to be that some of those engaged in training others are not the most effective of communicators and through his identity work [26] wants his listener to know that he does try to explain things, although his narrative de-personalises it to "you".

The footplate crew allocated to a specific locomotive on a particular day will vary according to which volunteers have made themselves available to work. Some will have worked together before, some will not. A driver reflects on this:

> *"I don't find it a problem working with different characters and managing them, as long as they're kind of aware of how long you've been there, et cetera, and most people are, because they've seen me around anyway, I think......I guess the people that are on with you have to get used to the way that you want things at the end of the day". [23] [Driver]*

There is some complex identity work in this narrative with the confidence (not a "problem") in managing others modified by the narrator's ideas of her expectations of how others identify her. Status and the amount time served (23 years in the narrator's case) appear as factors in her identity construction, along with the assumption that others will have seen her in the locomotive department or on the footplate. That those that crew the locomotive with her will need to adhere to her standards seems to be an attempt to present to others an impression of competence and confidence.

Looking at how Drivers approach their managing responsibilities from the perspective of the managed can shine light on a different perspective.

> *"I had an awful turn the other day, absolutely awful turn. And it just went tits up and I got off the footplate with the driver that it was so bad he couldn't even speak. And I kept apologising and, in the end, I said, "I wish you'd just shout, and make it?"*
>
> *I can't show my face down there again. They'll all be laughing at me. It will just be awful, awful, awful, awful, awful. I did come down again, with a Driver who I*

know well and who I trust and who've really enjoyed turns with. And who is connected to the other driver.

And I said, you must have heard about last weekend. And he said, don't worry about it. He said "we did exactly the same thing up the line at [another Station]". I said – "you did?" He said, "Yes, but we covered it. Nobody saw, nobody noticed". I've been beating myself up all week thinking I am the only numpty that would have ever made that mistake. They did exactly the same up the line when nobody could see." [13] [Fireman]

[13] narrates a complex set of events the nature of which she does not explain although she makes it clear that she is not the only person to have done whatever it was. Her identity as a Fireman was damaged by her Driver's approach to a particular event for reasons that were not made clear. Communication was minimal, not giving her the opportunity to reflect upon whatever it was the Driver felt was so awful, thus not providing a means to start repairing her damaged identity. It was a conversation with a trusted person that began the repair work, and the importance of trust in repairing a damaged identity might be seen as an essential requirement. Her discovery that the mistake she made had happened to others and was not unique to her can be seen as part of her learning process. That the trusted driver helped re-construct her identity to see the incident as a lesser event was important to her confidence as a fireman. And as we saw earlier passing her firing test was the "proudest moment of my life."

Another look at driver management behaviour from the perspective of the managed comes from the narrative of [40] who as a Cleaner is on the bottom rung of the footplate ladder and is also a Trustee.

"Technically, the locomotive is a bomb on wheels, and if things aren't necessarily going right, which can very easily happen, then that quickly can become quite high pressured. Some drivers can be politer than others, if things aren't going quite right. There are some drivers which are like, right, well, this is why this isn't quite happening. Perhaps you haven't coaled the fire properly. You've got a hole there or something. Other Drivers will be a bit more grumpy, to put it politely, and tell you to just blooming well get on with it." [40] [Cleaner]

Participant [40] recognises the safety-critical reasons the footplate tasks need to be carried out competently, and that crew members can make mistakes. From his experiences he tells how mistakes, or things not done quite correctly, can be highlighted differently by drivers. The experience of [13] was potentially damaging to her identity, whilst [40] acknowledging safety is the primary concern, did not narrate his experience as damaging to his identity.

The locomotive footplate training system is hierarchically structured with the second step on the ladder putting a Fireman into a first-line supervisory position with extra responsibilities for training the Cleaner. The top rung of the ladder sees the Driver managing the crew, training the Fireman and taking full responsibility for the safe operation of the locomotive and its train. The safety-critical nature of the operation throws the focus onto those activities involved in managing the vehicle itself. Training in management and training skills are not provided, which can lead to some less than positive outcomes. Those managing on the footplate demonstrate a variety of approaches to the task sometimes relying on past experience and identity, sometimes not. Some participants in this study have demonstrated resilience in keeping their identities intact when faced with situations that can damage them.

In the next section the undertaking of positions in addition to on the footplate will be explored.

6.4 How do volunteers engage with multiple position holding?

Whilst work on the locomotive footplate is physically demanding some participants also contribute to the management of Country Railway in different ways. Within the locomotive department participants there were not many examples of volunteers undertaking activities outside that department. This sub-section will consider the additional positions they undertake and how they come to take up those positions, firstly looking at those who pursued an opportunity when it arose, followed by an exploration of those who were invited by another to apply for a specific position.

6.4.1 Pursues opportunities

When opportunities that become available are drawn to a volunteer's attention by internal advertisement, through local knowledge or in other ways within a department, individuals choose whether or not to respond:

> *"I've been expressing interest in joining the signalling team and have been spending time observing in the signal boxes. And start my* [Signaller] *training in January. Actually, when I first arrived here, I spotted an opportunity, again for my own learning that if I volunteered in a workshop that I might be able to learn a lot more quickly. I recognised my learning curve was vertical and maybe sometimes*

with an overhang, actually. So, I volunteered one day a week in the workshop. And through that was asked if I would apply for a vacant [paid] *position in the workshop." [13] [Fireman]*

The opportunities to volunteer in other operational departments are mentioned by others' sometimes during training activities, sometimes in conversations with other volunteers. 'Local knowledge' has it that some departments are always open to offers to new volunteers, creating chances to train in different skills and to multi-task. [13] offers a narrative of being agentic in her interest in signalling and has turned an initial interest into action. This is a theme across the interview as previously in her volunteering and whilst training to become a Fireman she was agentic and within her department volunteered and then did paid work in the workshop in addition to her footplate training, with her identity work being around how learning from different sources might help her progression on the footplate ladder. An unintended consequence was the invitation to become a paid employee in the workshop.

[13] reflected on her approach to learning:

"Without having a knowledge of railways and the industry I really struggled to understand some of the subtleties that I think other people come with.... A lot of my learning to get on to the Fireman's training programme was self-directed and I had to grab people around me who were willing to teach me and make the most of that". [13] [Fireman]

In her reflection she identifies as someone lacking what she perceives as relevant knowledge and experience and makes an assumption that others do have those when they start volunteering. Her identity work was to address this perceived lack which, as recorded above, took her to the workshops and, maybe, to other sources of help and advice, although they are not mentioned in her narrative.

Other participants also talked about seeking out alternative positions, even when at a lower position in the locomotive department:

> *"I approached one of the signalling inspectors, because I was also quite interested in railway signalling, with a view to becoming a signalman here. And I went through the training for that, and I've been passed out now for the last 14 months." [40] [Cleaner]*

[40] is a Cleaner and has been for a number of years. Elsewhere in the interview he attributes his lack of progress moving up the footplate ladder to an inability to offer sufficient relevant days on which he can volunteer. In his story though, he tells that he has offered himself for an additional position that requires volunteering time not dissimilar to that required for the footplate. His narrative becomes still more complex when he reveals he has sought and obtained opportunities to work as a paid employee on Country Railway.

> *"I have been employed by Country Railway as well for the last five years. I dined on the Dining Train and I was working in restaurants at the time. I thought, I could do this easily. It's the job that I do and railways, which I enjoy. I approached the deputy catering manager and she said, "Absolutely, yes, we're looking for more staff'" I worked on there until Christmas last year. I'm now employed in the commercial department" [40] [Cleaner]*

Whilst [40] is classified in this study as a volunteer with locomotive footplate crew that was because it is the department in which he was interviewed. It is intriguing that he says he does not have sufficient time for footplate training because of other activities. Apart from his paid work at Country Railway and volunteering as a signaller he is also a Trustee. His identity work encompasses trying to manage switching from being a volunteer in a number of different activities to being a paid employee of Country Railway. In his identity work he does not seem to have addressed how he manages his time and he seems loathe to suggest he might give up some activities to concentrate his efforts on others. [40] is a young Trustee and said his approach to managing potentially conflicting identities was to have different email addresses for each one.

A small number of footplate participants volunteered for other positions, mostly non-managerial. Expressing an interest in another activity such as signalling led to training for signaller positions. The participants told of being proactive in their approach to finding the positions, and sometimes a volunteering activity might lead to a paid opening on the railway. By taking on another position identity work is activated to find ways of managing time and to develop different skills to those required on the locomotive footplate.

The next sub-section will look at the taking on of an additional position following an overture from another.

6.4.2. Invited/approached by another person

This research showed that some positions appear to be filled within Country Railway through a personal approach made to the volunteer usually by a more senior individual. Opportunities offered covered a number of positions with the volunteer

Trustee position sometimes filled as a result of personal approaches – although any provisional appointment as a Trustee has to be confirmed subsequently at an Annual General Meeting. This study considers only those participants who responded to such overtures; no other participants indicated they had declined an overture.

A Driver with substantial railway industry experience recalls how he was approached:

> *"In my professional life I used to run depots on the big railway. So, I'm used to managing all the risks and everything you need to manage to run locomotives and rolling stock... then someone says, you know, "Could you help me in this area?" Which is what* [a named senior volunteer team member] *said to me. And you look at that area and you think, "Oh, God, you know, I can see [what can be done]..... No, no, no, leave me alone!.... Now would you....... Ah, it's fantastic! ...... Yes, okay, I'll do it." [11] [Driver]*

[11] narrates himself as an expert in an area of railway operations, saying he has experience from the 'big' railway and is asked to bring some of that experience to Country Railway. What his narrative does not explain is how he came to be recognised as an expert in that particular field by a senior member of Country Railway, although elsewhere in his narrative he tells of having a public profile on the 'big' railway. His identity construction relies on his prior experience and his professionalism and confidence in his particular area of expertise. During in the interview he presents a brief picture of holding back from the overture made to him and then enthusiastically responds positively. A further quote from his transcript sheds more light on his identity work when taking on the additional position:

"It's a challenge that I don't need. I just get pleasure out of driving steam trains. But I've got the… you know, you get that drug and, you know, you want to see it flourish because what you get out of seeing people working well together is an immense buzz. And so, I can't resist the buzz, so you do it, don't you?........If someone [else] wanted to do it, really wanted to do it I'd just, yes, crack on. But meanwhile…!" [11]

Here [11] is saying that he is very focused on success ("seeing things done well"). In other places in his narrative, he looks back to his paid employment and to what he says are successes. The identity he constructed within his narrative was of an individual determined to succeed and willing to continue accepting challenging tasks from his employer beyond his normal retirement age. In the narrative he attempts to appear not overly enthusiastic about the overture made ("don't need"), saying he would be willing to let someone else do the work. His narrative says he wants to accept ("can't resist the buzz") but is not clear why he describes reluctance to accept the position. He uses the analogy of a drug for his enthusiasm for making things work successfully and this comes up several times in the narrative. His identity work seems to imply that he is addicted to success and uses the drug analogy to propose that he just can't help himself; when an opportunity comes his way, he simply must pursue it.

Individuals do not always get overtures made to them because of their demonstrated prior experience in railway operations or management. [40]'s story presents a different perspective in which he recounted that he had thought about applying for a vacant Trustee position when:

"I was approached by [a senior volunteer member] *and he said, have you thought about this? I think you'd bring some qualities that we haven't got at the moment. And I had thought about it, and with his twittering in my ear as well, I thought, no, I'm going to apply. I'm going to see what happens. And I thought, if I don't get it, I don't get it, but there's no harm in applying. So, I applied, sent a little letter explaining why I think I'd be good for the role, had an interview with four other trustees and I was successful". [40]*

As mentioned above [40] is relatively young, an employee of Country Railway as well as a volunteer in two departments and is thinking about becoming a Trustee. He provides a clue later in the interview when he says:

"But I bring a completely different view on heritage railways and preservation and what the current scene is to other people on that board of trustees. There is a generation of railway enthusiasts, of my generation and another generation below me, who view it very differently to how some of the trustees two, three, four generations above me operated the railway when they were young, my age, and how they view it now." [40] [Cleaner]

Apart from offering a different perspective he does not say what he wants to achieve as a Trustee. In his identity work he makes a positive break between older Trustees and the later generations and sees himself presenting those later generations views. His identity work as a new Trustee is continuing and in the previous sub-section he told how he managed his identity and possible conflicts of interest by having separate email addresses for each position. Further probing produced some reflection:

"I don't want there to be any conflict of interest. Not that I think there really is, but for any avoidance of doubt, I keep them totally separate. I try not to discuss anything that's been going on, let's say, in the office at a trustee meeting because it will be fed to them through the official channels" [40]

It would appear that as he had not been a Trustee for very long, he is still undertaking identity work around the management of potential conflicts of interest. He has said that he saw "no harm" in becoming a Trustee which might suggest a relaxed and perhaps not completely thought through approach to the Trustee position.

The opportunity to undertake an additional position may arise more casually and without overtures through a structured conversation:

"I was chatting to, one of our Drivers, he's an Inspector. And the subject of the department came up and he said, '" Oh yes, we're looking for another Inspector". He said, "Your name has been mentioned but you haven't been approached because we weren't sure if you've got the time." [26]

This initial conversation triggered further reflection which led him to apply for the position:

"My initial response was, yes, you're probably right. I don't particularly want to. Then I thought about it, and now my children are older they don't need so much time. So, I chatted to my wife and said, it might involve being down there a bit more. And she said, "Yes, fine." Probably glad to get rid of me. So, I thought about it and I applied" [26] [Driver]

This reflection by [26] provides us with an interesting example of an identity being re-constructed to accommodate a further managerial position. Time availability was identified as an issue which was then resolved by negotiating the reconstruction of his identity as a member of a family unit to provide the time required for the new position.

Whilst some participants indicated a willingness to take on additional positions when approached, sometimes an individual may over-commit. Approaches to take on an additional position may be made by volunteers in the senior team who perhaps are not aware of the totality of an individual's existing commitments. [8] recounts how his volunteer workload grew alongside his fulltime employment. He volunteered for Country Railway, as noted earlier, and became a trainee in the Locomotive Department and, whilst doing that, he was asked to:

> *"...help on restoring some of the [privately owned] steam engines so I became a working volunteer of that group as well. So, one thing led to another within that department, and this is going alongside the other progression in the Loco department. I became the Membership Secretary of the [private owning group, and a Director of the [private owning group] as well. And then within the Loco department I'm the driver's representative to the Loco Operating Safety Group, ... and my wife and I look after the Memorial Garden at [Station], although we do have help now". [8] [Driver]*

The focus of this research is on those who manage other volunteers within Country Railway, but a further complexity may be introduced when there are some other separate organisations located on Country Railways sites, providing each with some mutual cooperation. In this case the private owning group own locomotives which they hire to Country Railway to help run services and in return Country Railway provide accommodation for the locomotives. Volunteers with Country Railway are able to join the private owning group and also volunteer with it to help coincidentally at the same time becoming familiar with a locomotive they will drive for the railway. [8] has a foot in both camps and has management positions along with other practical non-managerial activities. In his narrative [8] does not enlarge on the reasoning behind collecting this range of additional positions. Perhaps the cryptic ‘one thing led to another’, an expression not totally unfamiliar within volunteering circles, suggests a difficulty in saying ‘no’ within his identity construction. Somehow, he came to the attention of a member (or members) of the volunteer senior management team of Country Railway and was asked to consider becoming a Trustee.

> *“That really was being ambushed. [By a senior team member]. I think I really did that out of a feeling of obligation, I’d say because they didn’t have anyone else to do it. I wasn’t someone who put myself forward and got voted in. There was no-one had put in for it and it was the day of the last submission, and no-one had put in for it. So, if I hadn’t put in for it they would have been a Trustee down, they might have had to co-opt someone and actually ask other people.” [8] [Driver]*

With his agreement to be put forward for a Trustee position [8] undertakes some identity work to protect his identity and to provide the listener with some *post hoc* rationalisation. He felt pressure to accept (“ambushed”) and relates he that would not have sought the position himself. The story tells of a concern, by whom is not known, that if he did not accept the nomination for the position ‘they’ would be a Trustee short and might have to co-opt an unnamed someone else. Why this became an ‘obligation’ to be nominated is not clear, although this may involve some distancing of himself from the situation. Elsewhere in the interview he does refer to himself as the Trustee for the locomotive department. The identity work here is difficult to follow but he reflects a little further on what he thinks might have been behind the overture made to him:

> *"...probably because I've been here a while and they're keen to get younger faces, and there's myself and someone else there under 40. I think that's one of the reasons to be honest and probably because I'm quite fair. I'm not somebody of extreme views – that they know about – you know maybe that's one of the reasons as well. A safe bet maybe. I don't know." [8]*

In this reflection he is undertaking identity work to find ways to re-construct an identity as a Trustee. Having felt it to be an obligation, he reflects on what the thinking of the other might have been, adding in his own perception of his identity as being 'fair', which he further identifies as being 'safe'. He does wrap a warning note around that by including "as far as they know" in his narrative, although it is possibly a bit of rhetoric for his audience. Having multiple positions which include some issues for which he does not seem very enthusiastic, does not lead to good outcomes.

> *"I don't get any enjoyment out of being a Trustee, that's the issue I suppose.... Well, ...I'm glad I was there, like recently someone came up with a scheme to do something out in the car park and I sort of shot it down in flames, said "You haven't thought this through".......there's a sense of achievement, so you could say that was enjoyment, but actually it's just a bit of a burden. I guess I'm not the sort of person. I'm not naturally suited to that, ...I don't have enough time to actively pursue, there's all sorts of stuff comes up that could be done..... but I*

don't have the time to do it properly".... "But I'm probably going to have to knock that one [the loco driver's representative] on the head because I've got too much. I can't do it. I can't physically be at all these meetings." [8]

[8] has both practical temporal and identity problems which he is trying to resolve. Having become a Trustee he finds it something of a burden and recounts only one positive experience. He is re-constructing his identity as he reflects on his unsuitability for the position he accepted and to over-commitment of his time.

The story of [8]'s engagement with multiple positions has been described at length as it illustrates the risks to both the individual volunteer and the organisation of over-commitment of time, and the potential unsuitability of an individual to a significant senior management position. The outcome for the organisation is unlikely to be good in the longer term - an approach to which an individual feels 'ambushed' into a position perhaps not being the best method of selection.

In this section the process by which locomotive footplate volunteers take up multiple positions has been explored with a number of different approaches narrated, although personal contact either from the volunteer or to the volunteer by another has been noted on a number of occasions. This somewhat informal approach is not without risks.

Before concluding this chapter, the following sub-section explores briefly an unusual management position specific to the Locomotive Department.

6.4.3 The Running Foreman

The job title 'Running Foreman' is one used on mainline steam railways in the past to signify the person managing the day-to-day operation of the steam locomotive shed in which the steam locomotives are stored overnight. It entailed ensuring the rostered locomotives are prepared for operation and leave the shed on time to operate the timetabled services. Getting fully crewed steam locomotives to be ready to leave the shed on time is not straightforward as steam locomotives do not start at the turn of a key or press of a button like a car or lorry, but require careful preparation by the crew over about a three-hour period.

At Country Railway the Running Foreman position is covered every operating day by either a Driver or Fireman who is rostered to the position for only that day. As the duty is shared between a large group, an individual may cover several Running Foreman duties during the course of a year, but they are not rostered consecutively nor frequently. The research interest in this position arises not so much from the Drivers rostered as Running Foremen but from the Firemen. A Fireman undertaking the position as Running Foreman works in a situation in which the normal footplate hierarchy is reversed and a Fireman manages Drivers. It is potentially a complex position sometimes involving making minute-to-minute management decisions which could include ensuring cover for any crewing gaps caused by, for example, a sickness absence, that the locomotives have their fires lit in time to ensure departure to the schedule and any technical problems are resolved either by the crew or an engineering fitter. [22] a Fireman explains:

"If you're Running Foreman, actually you're in charge of the whole operation within the loco yard, when the engines go out, and ultimately, even as Running Foreman, the operating supervisor [usually a paid manager and in charge of the whole railway operation] *is your boss for the day, but you're everybody else's boss....... a kind of an interesting thing, because obviously, you know, drivers are senior to me as a fireman in pure grade structure, but then when I'm running foreman, then ultimately, I'm the one that's telling them to do something and they couldn't do it without me....." [22]*

Undertaking a demanding task is one thing but having to re-construct identity for just one day is challenging and how confident and assertive an individual perceives themself within their other identities seems to play a part. The crews being managed by the Running Foreman understand the process, and certainly many of them will have undertaken the position themselves. However, when considering some of the footplate experiences narrated above by Firemen, some degree of trepidation seems to be a possibility.

Individual approaches to the job and identity issues will vary and having resources from previous work experience might be used to help create an identity. [21] a Fireman spent his working life as a driver on mainline railways.

"....the Running Foreman thing was like, you trained up one weekend and then three weeks later, you are running foreman. So, now you've got to learn on your own really.... I realised that I've learnt more about how I want to be a running foreman over the period of time that I've done the Running Foreman role...... If I'm in charge of something, even if there's a senior Driver who's pulled some points, I would be quite happy to pull him up over the fact that I'm in charge of

the yard, 'you shouldn't move that engine without my permission'. ....because that's my role and if he wants to undermine it, I'm going to give him an earful....... It doesn't matter that it's me, I'm wearing that hat therefore, this is the hat that is telling you I want you to do this, that". [21]

Having a lot of railway experience helps an individual to understand some of the issues despite that mainline railway experience does not include running steam locomotive sheds. [21] narrates that he takes the initiative in learning for the position noting it is about how he decides he wants to do the job. His analogy of 'wearing that hat' is interesting and in the Running Foreman context gives the 'wearer' permission to behave as they perceive the 'hat' demands. Indeed, In the railway industry context, historically the shed foreman would visually indicate his status by wearing a bowler hat. In his identity work [21] is protecting his identity by associating the work he is doing with a particular hat and dissociating himself from the action he might be required to take.

The re-construction of identity may be more challenging for some individuals as they seek ways to protect their identity.

"Running Foreman, you are in charge of the yard and in charge of all the personnel including the drivers. When I'm a Fireman, I report to every Driver. The hierarchy is really clear. As a Running Foreman I have to oversee everything that's going on in the yard and be mindful of what's going on for the operating supervisor and anything in the station.... And I have had people mutter as they walk away, what does she know? She's only a Fireman. Two things, (a) I am a Fireman, beyond (b) I'm a female. They need to get their heads around that. [13]

[13] narrates the change in the hierarchical arrangements and her understanding of what is what is expected of her, expressing no issue with the task itself. Indeed, she comments elsewhere that she makes a particular effort to train those Cleaners who remain working in the shed all day in the skills of firing. Remarking about the unhelpful comments of unnamed others, to protect her own identity she firmly relocates the solution of the issues they might have back to those others themselves. The Running Foreman position is unusual in many ways and, considering it is a very responsible management position, individual volunteers are largely left to find their own ways to manage. In this research the position was mentioned mostly by Firemen, by a few Drivers and by those who did mention it, they did so only in passing. This might suggest that operating within the normal status hierarchy the Running Foreman position presents them with few, or no, issues.

6.5 Conclusions

This chapter has explored a particular group of volunteer participants who undertake an unusual safety-critical job – driving a steam locomotive. Once a job that employed thousands, with the demise of steam traction on the national railway network at the end of the 1960s it is now a job undertaken by a relatively small number of volunteers on heritage steam railways (although those who drive steam traction engines on the road should not be forgotten). There remains from days gone by some of the mystery and allure and even romantic appeal in driving a steam locomotive and those who are able to do so today are envied by many. The reality, as in the days of mainline steam, is that the romantic image is modified somewhat when undertaking the task. It is an environment that can be dangerous, hot, cold, draughty, wet and for the Fireman entailing much physical hard work. Volunteers are still forthcoming.

Section 6.2 explored how participants started their volunteering with Country Railway, and the sub-sections demonstrate the nuances in approaches. In sub-section 6.2.1, *The Enthusiast*, those who started volunteering when very young are examined. Parental support was essential to facilitate their volunteering - sometimes it was a parent's own interest that set the child along the road to becoming a volunteer. A number of those who came through this route did so many years ago when children were allowed much more freedom to engage in work generally considered only undertaken by adults. Sub-section 6.2.2, *The Generally Interested*, looked at those who may well have been enthusiasts at an early age but made decisions not to pursue that interest until their lifestyle was more suited to it – at retirement, for example. There are examples where, in a similar way to the previous sub-section, early parental interest played a part in the wish to volunteer the difference being that whilst the interest remained it was subordinated to other life matters. The sub-section 6.2.3, *Discovered It,* reviewed those who had some but not necessarily very strong interest, in railways and did nothing about it until some other event, maybe initiated by another, sparked their enthusiasm again sufficiently for them to start volunteering. This section suggests that even amongst those who profess an interest of some kind in railways there is a diverse range of ways in which individuals initiate their volunteering.

Section 6.3 considered how volunteers on the locomotive footplate *first became managers*. The footplate crew arrive in their first management position as an outcome of their progression through the hierarchical structure. On becoming a Fireman there is a requirement to undertake first-line supervision and on-the-job training of the Cleaner. Once an individual becomes a Driver there is a requirement to manage the locomotive, the footplate crew and provide on-the-job training for the Fireman. Whilst this does work in practice, it does not always work well maybe because no training in people related skills is provided and not all individuals wish to engage in people management activities, their primary interest being in the locomotive itself. Both manager and managed are left to work their own ways through the process. With the footplate being a potentially dangerous place to work some of the stories narrated by participants prioritise managing safety over concern for managing people.

The holding of *multiple positions* was reviewed in section 6.4, with sub-section 6.4.1 looking at those who pursued opportunities to do additional work in operational, signalling, and catering positions. Sub-section 6.4.2 considered the nuanced approaches made by other to individuals to undertake more senior positions such as Inspector or Trustee. The methods by which approaches were made and the longer-term outcomes were considered in more depth and a finding is that the result of overtures to take on a senior position in the railway were shown not always to work out well for the participant as they struggled with the workload and identity issues.

The final section of this chapter considered one particular job, the *Running Foreman,* covered by allocating Drivers or Firemen to the position for perhaps one or two days in a roster period. It is a responsible position within the operation and for the Firemen entails a reversal of the usual footplate hierarchy with a Fireman given responsibility for managing all the Drivers on duty. Whilst a justification can be made for the experience to be a useful part of the learning process the Firemen in my study reported identity work to protect their identities whilst undertaking the position.

6.6 Implications for the research questions

This section, and the similar sections in Chapters 7.6 (the Station) and 8.6 (the Workshops), explores the underlying patterns and implications found from my analysis of the narrations of participants in this research.

6.6.1 In what ways are routes into volunteering navigated?

My analysis found that participants who volunteered on the steam locomotive footplate mostly demonstrated a strong commitment to being locomotive crew. Their routes into volunteering varied, one route narrated was that of joining at a young age and becoming involved in locomotive activities in times when safety-criticality was viewed with less thoroughness than present times. There were boundaries to be crossed including that from schoolchild to a volunteer alongside adults. The impact of boundary crossing from schoolchild to volunteer was in for many experienced relatively easily. These narratives were influenced by the attitudes demonstrated towards the young person by the adult volunteers they met and with whom they worked. Identity work was undertaken during the transition. Their relative youth (sometimes a long way below the minimum of 16 required now) meant their understanding of railway operational matters was limited. This route into volunteering is no longer open, although it remains a strong memory for those who navigated it.

Whilst narrating a strong interest in being on the footplate other participants took a route that deferred their entry to volunteering until later in life as work and other activities took priority. Boundaries of time and place were experienced according to individual time and location demands. These were approached in a planned manner, with participants generally having a sound understanding of what being on the locomotive footplate would entail.

Those participants who narrated planning for the stage in their life where they expected to make time available for volunteering, often being mentioned retirement, and crossing the boundary from working life to volunteering had been anticipated. Passive "armchair" membership of Country Railway provided opportunities to visit the railway as a passenger and to read about volunteering in railway publications. This engagement facilitated gaining a basic understanding of volunteering opportunities and what would be required of them as volunteers, easing the navigation of boundaries.

6.6.2 What are volunteers experiences of becoming a manager?

Volunteers on the steam locomotive footplate follow a competency-based training programme, one outcome of which is that progression through the programme takes the individual to a first-line supervisory position. The competency training programme does not include specific preparation for supervision which may account for differing experiences of becoming a manager being narrated. Thus, there were individuals with little knowledge and skill in the supervision and management of people. My analysis highlights that engagement with boundary crossing into supervision and management required greater identity work to cross those boundaries with less resources. Others with more relevant experience in their paid work environments appeared more confident crossing this boundary.

6.6.3 How do volunteers engage with multiple position holding?

Holding multiple positions as a volunteer is complex, as the individual may become a member of different groups undertaking different activities. My analysis finds that when considering barriers to be crossed perhaps the least difficult crossing is holding multiple positions within the steam locomotive department, as here the activities being undertaken, and the other volunteers involved are more likely to be known by the volunteer. Other participants narrated volunteering their multiple positions in different departments which gave them interfaces at multiple boundaries with the associated identity work. The pathways to other operational positions included selection and training, whilst the holding of a Trustee position was made by different pathways. (My analysis of what I describe as the pathways to management positions is explained further in Table 9.1).

My analysis found occasional narratives which related a route into holding multiple positions did not always lead to a successful outcome, with less successful outcomes occurring when a volunteer accepts an invitation by another to undertake a position with which the volunteer was unfamiliar.

Using the same analytical framework, the next chapter looks at participants from two of the stations who undertake platform duties.

CHAPTER 7: RESULTS – AT THE STATION: "ALL ABOARD!"

This chapter explores the stories of those volunteers who work on the platforms of the two stations that were studied. The stations represent the second of the three locations studied to address the research question "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?" This chapter follows the analytical framework of the previous chapter and section 7.1 will present an overview of the stations and platform work. Section 7.2 will review narratives of becoming a volunteer, Section 7.3 will look at how participants first became a manager of volunteers, Section 7.4 will consider those managers who undertake more than one position, Section 7.5 draws conclusions from the chapter and Section 7.6 considers implications for the research questions.

7.1 Introduction: The scene from the platform

The platform volunteers are customer-facing and undertake a range of duties including keeping the station platforms and buildings clean and tidy, checking the tickets of passengers, making sure passengers are boarded on their train ready for departure, undertaking the safe despatch of the train on its journey from the station, and when trains arrive, helping passengers leaving the train and station to do so safely. They are trained to undertake these activities competently through a structured training and progression system with increasing levels of responsibility. The platform volunteers are graded according to their competence and progression. Table 7.1 below summarises how the progression system operates.

Table 7.1 Summary of station staff hierarchical progression system

Position	
Trainee Porter	Learning the basics and helping out. Complete 3 of 9 competences and promoted to Porter.
Porter	Learning platform duties and wider safety protocols. Complete the final 6 of 9 competences and promoted to the safety-critical Leading Porter position.
Leading Porter	Competent to undertake safety critical activities, e.g., train dispatch, escorting passengers over rail crossings. From this position an individual can be considered for training in safety critical roles in other departments on the railway. Supervises the work of Porters.
Station Foreman	First line supervisor of all platform staff and activities. When appointed further training in additional competences is undertaken. This position is filled by application and selection.
Station Master	Overall charge of all the station activities including problem solving, action to be taken when things go wrong, maintaining standards. This position is filled by application and selection.

Progression to the Leading Porter position is through a structured training and assessment programme, whilst promotion beyond that to Station Foreman and thence

Station Master is by application and interview. Having achieved recognition as being competent to undertake safety-critical tasks through promotion to Leading Porter, the volunteer supervises of the tasks undertaken by Porters. In the event of there being no Station Foreman on duty, the Leading Porter will substitute for that person. As the Leading Porter training programme leads to recognition of being competent to undertake safety-critical activities an individual also may use the Leading Porter position as the stepping-off point to other safety-critical operational positions in Country Railway.

To ensure adequate staff coverage in all the platform jobs on operating days throughout the year Station A requires a complement of around sixty volunteers to staff the platforms as most passengers begin and end their journeys at Station A. Having fewer passengers passing over its platforms Station A requires around 35 volunteers.

7.2 In what ways are routes into volunteering navigated?

How participants narrated how they became a volunteer differ, and those differences bring a variety of perceptions about volunteering and managing. The narratives in this section will demonstrate there is no one clear route to volunteering, although a number of participants seem to have trod similar roads. Individuals become volunteers from differing backgrounds, experiences and identities and being a volunteer is part of their identity construction. Three narrative themes are explored here: the ‘life-long enthusiast’, the ‘generally interested’ and those who 'discovered volunteering’.

7.2.1 The life-long enthusiast

My analysis did not identify any narratives from the station volunteer participants that fit into this category of the enthusiast starting their volunteering at a young age. There are several who narrated they had an interest in railways from an early age but all of them told they started their volunteering later in life. In this respect those participants who volunteer on the platforms provided accounts that seem to be more measured in their approaches to their interest in railway and decisions about where and when to become an active volunteer. Whilst some participants did express an interest at an early age in railways, they did not offer this as an explanation for subsequent active engagement.

7.3.2. The generally interested

This group comprises those who narrated an interest in railways, sometimes from an early age but who did not volunteer until later in life. For example, Participant [6] says:

> *"I used to go train spotting when I was younger. So, I've always been interested in railways anyway. It all started when I got made redundant from work, because I was having a job to find another job anyway and my wife said to me 'I'm not having you under my feet!' And they basically bought me membership of the Country Railway and pushed me along to volunteer." [6]*

Despite offering that he had, an early interest in railways, this is set as a backdrop to the story of becoming a volunteer. Becoming a volunteer is centred around a change in work circumstances and family context. Indeed, the identity he recounts did not encompass anything specifically railway-related, nor did the idea becoming a volunteer apparently emerge until after he was made redundant. Here Participant [6] gives his wife and others, agency to influence the direction he followed, and maybe justifying his own lack of agency by suggesting he was 'pushed' to start volunteering. He appears to have focused on the issues related to being made redundant and of finding it difficult to obtain another job and so his identity work here involved re-constructing a damaged identity. The 'push' provided by others set him in a different direction and, seven years on, he continues to volunteer.

Also having an interest in railways from an early age, a different account is offered by participant [3]:

> *"I came here because I became interested in trains in 1955. It just so happens that my sister is married to a director of [another heritage railway] .....when we get together we get told off for talking trains.....I've always said I would get involved once I retired from work and as soon as I retired, that's it I came along here and volunteered" [3]*

[3] sets out that he had a long-term plan ("I've always said...") to fulfil his railway interests when he retired, highlighting his interest in the wider heritage railway community. He was not new to the idea of volunteering:

> *"I volunteer in (non-railway organisation) and I've been in there for nearly 33 years" [3]*

The commitment to volunteering with the (non-railway) organisation has been considerable including having held several senior positions. He is still involved, he relates his wife is involved as well and that this involves both the volunteering activity and family. He and his wife agree their allocation of time to the different organisations. The identity work undertaken by [3] can be viewed as having been agentic and well-structured, with the choices he made resulting from goals to achieve in a pre-determined life-time framework.

Linking a passion for something and volunteering [36] expressed it thus:

> *"Volunteering is always a passion about something, and I've always had a passion about steam railways, from the age of five." [36]*

Whilst [36]'s account tells of a very early interest ("passion") in railways his narrative is categorised in this sub=section because despite this early interest he did later identify strongly enough to volunteer as a young person. With his assertion that volunteering is always about "a passion" he is telling his audience how he identifies the act of volunteering, placing it beyond a casual activity. Elsewhere in his narrative he tells of having a career in two very different organisations. The first, and longest, part of his career in the Royal Navy would have made the practicalities of volunteering at a heritage steam railway very difficult. The re-kindling of his interest in the possibility of engaging in a long-standing railway passion, came about by chance:

> *"I always had lunch with a colleague, and I just so happened to ask him what he was doing the next day, on the weekend, and he said, I'm going down to clip tickets on the Country Railway." [36]*

In his narrative [36] reports that a question completely disassociated with railways produced an answer that initiated activity leading to him becoming a volunteer at Country Railway, with subsequent identity work leading towards the construction of an identity of an engaged volunteer. His account of passion for railways might be seen as a U-shaped curve with the early passion sinking to the bottom of the U-shape as other activities in life were salient, and then the chance conversation sending the passion back towards the top of the curve.

Some participants in their accounts tell of their long interest in railways:

> "*I've always been, from the age of about two, keen on railways." [1]*

Whilst being the earliest age narrated by a participant at which an interest in railways started, he tells that this took him to become a paid employee of the main line railways:

> *"I worked for British Railways for 40 years in the Operations Department. I wanted to volunteer somewhere and the Country Railway is the obvious one because I live [nearby]. I've been a member since the late nineties. I didn't want to work on British Railways and then play on the Country Railway and so I waited until retirement." [1]*

His interest in railways has formed a part of his identity throughout life, and whilst the early interest did not lead to volunteering, in later identity work he thought about what he would do after retirement. He reflects on 'working' on the mainline railway and 'playing' on Country Railway separating in his narrative what he perceives as the serious and important from what he might perceive as the less serious and demanding – or maybe it is a perception of the relative sizes of the two organisations. He had been an 'armchair' member of Country Railway for a long time but then re-created a future on-going identity as a volunteer at Country Railway. His account of wanting to become a volunteer is not about only using his technical competence though:

> *"...when I retired from British Railways after 40 years of working with people, I missed the camaraderie and it's the camaraderie aspect* [of volunteering] *I like." [1]*

The identity work in which he engaged was complex in that he was keen on railways from a very early age, spent his working life in railways, had absorbed the railway environment and within that environment worked with the people who for him in his narrative make it so important. Whilst the experience of years of working with people could be re-created in a wide variety of circumstances, it seems not any people will do – they need to be people involved in railways. Facing the inevitable prospect of retirement and the loss of railway camaraderie and the loss of his identity as a railwayman he sought to limit the damage to his identity and re-create his identity as a volunteer at Country Railway.

Another participant who had also worked on the 'big' railway for his paid career narrated:

> *"Well, having an interest in trains right from a very young age, I spent 37 years on the big railway doing various roles. And by a chance conversation one day with [name] who was my boss at the time, we both decided that we'd perhaps like to volunteer as guard on a heritage railway. And living where we do, the railway was the ideal place to come to." [44]*

Acknowledging an early interest in trains and a career on the mainline railway [44] does not talk of an identity that included volunteering on a heritage railway until someone else triggered the idea in conversation. He neither suggests nor denies agency, attributing the unnamed other's proposal as a joint decision to volunteer. Using the unnamed other he suggests the nearness of the railway to their homes made Country Railway their choice. In contrast to other participants cited so far in this section [44] does not relate having a plan to become a volunteer, although in response to a question put by the researcher about wanting to stay engaged with the railway industry post-retirement he said: *"With something to do with railways, yes".* Later in the interview he says:

> *"Well, I don't think it was so much the volunteering. The fact that it was just a railway… [44]*

The identity work taking place here is complicated by his becoming a volunteer and yet volunteering was not narrated as a part of a plan. His identity seems tied to that of a railway employee who is trying to retain that same identity after retirement, maybe as an identity damage limitation exercise, and with him staying involved with railways but at a smaller scale and making a contrast with the 'big' railway from which he came to that at which he volunteers.

Recounting in his narrative a general interest in railways [31] did know of Country Railway because he lived nearby but did not do anything about volunteering there until his retirement. He identifies as knowing about the railway but not about the volunteering opportunities:

> *"I've known about it a long time, but I didn't know about volunteering before that". [31]*

He came to a volunteer recruitment day run by Country Railway and decided to get involved. He identifies as a railway volunteer enjoying what he does on the platform but does not prioritise the railway over other activities in which he is involved. A volunteer of around five years, he says he enjoys working with other volunteers although he makes the observation:

> *"What you find sometimes is people, especially if they've got a railway background, they are a bit more officious". [31]*

He does not explain what an "officious" person is like or how such a person behaves, nor how he establishes an individuals' background. In his identity work he says he has views on the approaches of officious versus presumably not officious people. The only clue in his narrative is:

> *"They* [other volunteers] *are used to having a variety of tasks." [31]*

His narrative contains no other information about "officious" volunteers.

The expression 'armchair member' is often used to refer to those who are paid members of the Society supporting Country Railway, but do not volunteer – the armchair maybe being what they sit in to read the railways' magazine. However, being an armchair member of the railway is yet another possible way of turning the identity from that which incorporates a general interest into one as a volunteer:

> *"I've always had an interest in the railway, we were armchair members originally. And I had early retirement and thought I'd come down and volunteer." [33]*

When probed about whether he had a longer standing interest in railways generally he did not say 'yes', offering instead:

"There's a bit of railways in the blood. Country Railway is the nearest one to home, so I'd come here in the past. My grandfather was a railwayman, so it must be in the blood somewhere." [33]

Links between family members and their volunteering activities have been identified elsewhere (O'Toole, 2013, 2016), with an individual following a father or grandfather into the same volunteering activity.

Finally, in this sub-section, a geographical extension of the armchair member is the armchair member living overseas:

"I became a member of Country Railway when I was living overseas. And in becoming a member… when I retired early in 2005, the summer issue of the Country Railway News was asking for station staff volunteers, and I thought, Oh yes, I can do that" [43].

This volunteer recounts he had a general interest in Country Railway, although his narrative does not explain how this came about, but he thought to progress the opportunity to re-construct part of his identity when he read an invitation to volunteer. His previous life did not provide the time nor location for him to undertake active volunteer until changes to life, particularly returning to the UK, and to identity began to occur, the advertisement providing an opening for the start re-construction. His identity work shows an interest in showing ability to do a particular task, responding to a request for help and addressing an interest he has held for a long time.

This subsection has explored accounts of volunteers who, whilst some recounted an early interest in railways, did not start volunteering at Country Railway early in their lives. The identities they constructed prioritised other activities until life changes, in the participants' narratives primarily related to retirement, made volunteering at Country Railway salient. Having had lifelong volunteering activity with a completely different type of organisation does not act as a barrier to volunteering with another organisation as salience increases with the additional time available at retirement. Some stories included narrations of retirement from the mainline railway industry and how volunteering with Country Railway enabled a continuation with elements of a former identity they would otherwise have to discard.

The next subsection will look at how narratives of having no particular prior interest in railways were not a bar to becoming a volunteer and progressing with a volunteering career at Country Railway.

7.2.3 Discovered it

This sub-section considers how volunteering at Country Railway might start from a position of having no prior interest in heritage steam railways.

Country Railway represented opportunities to volunteer close to home. Having a job that required him to keep up-to-date with technological changes [7] narrated:

> *"I got to the age where I decided I'd done as much* [keeping up-to-date] *as I'm ever going to do and I had a bit of spare time. So, I decided what am I going to fill my spare time with. And I thought I know I'll go and volunteer with Country Railway. And that's what I did. I'd been a visitor, but not a recent visitor. I grew up around here so I was very aware of the Country Railway's existence, so it's just yeah, it was local to me." [7]*

Participant [7]'s career involved a specialist technical job and he explains how anticipating retirement he found himself with spare time. Narratively, this is a summarised, agentic story, concluding with "And that's what I did" which closes his narrative of becoming a volunteer. Offering further justification Participant [7] narrates the railway and its activities as just something local and part of his community that he could engage with whilst still in full-time employment. He does not explain why the opportunities it might present to him were of interest, nor how he knew of those opportunities. His narration includes a concern about filling the spare time that comes available when retired and continuing to keep him busy.

Knowing a little about railways does not seem necessarily to lead to any enthusiasm or plan to become actively involved as a volunteer in the accounts of participants. For example, Participant [4], whilst having a father who was a railwayman, narrates an interest in Country Railway that was no different to that of the usual railway customer:

> *"We always used to come over here and grab a ride. One day there was a notice out, you know 'Do you want to volunteer?' And my wife said "Well why don't you?". And I came on a Sunday the next month and that was it." [4]*

This is not a story of complete chance; as he had family associations; his father had worked on the railways, and he and his wife had visited Country Railway for rides on the train.

He positions his wife as suggesting he volunteer in response to an advertisement. He did and he started working at the station on the platform:

> *"And this suits me down to the ground because I like speaking to people.....I can come out here and feel relaxed". [4]*

He relates he is happy being a Porter and has no wish to progress further. In his identity work he is agentic about the time he apportions to the railway, about fitting into a volunteering situation involving customer contact in which he is comfortable and familiar from his past paid employment and being in an environment he finds relaxing. Being relaxed and comfortable with his understanding of the railways expectations of him form an important part of his identity. [4] is a participant who recounts he is comfortable in the position he holds, has no wish to progress and is not a manager.

Expressing no prior interest in heritage railways but being introduced to the railway indirectly [2] is another example:

> "[A family member] *is a driver here....my grandson asked me take him down to the railway to see his Dad... they* [grandson and wife] *went off to see their Dad and I just stood and talked to two of the porters...... got on very, very well with them and two weeks later I was on the platform. That was it and I haven't looked back since. It's a complete change – a change of life. You know for the year I was at home before I came down here, I was just sitting there playing on the computer all the time. I was just getting bored." [2]*

By just being on the platform and talking to some volunteers his interest in volunteering at Country Railway was sparked. His story includes a transition from bored retiree to active volunteer which he reports as life-changing. From a different starting point, this is a story of identity construction differing from those who planned to volunteer once retired, with the participant taking the agency for his transition. The unnamed 'other porters' have a part in the transition as it was his interaction with them that sparked the interest to do something positive and life-changing. The work involved in re-construction of his identity took him from a bored retired ex-employee to an active volunteer and following the progression route to become a manager at Country Railway.

Other stories offer a view that without ever having visited Country Railway, a chance conversation can bring about action as [5] narrates:

> *"Where I live there's a model railway you can ride on and [name] who runs it actually is in the shed down [at Country Railway] and one day said "Why don't you do this when you retire?" I said might be interested, but .... I had no interest in railways whatsoever, but having had a career where I travelled the world and met people from different countries, I thought might be interesting on the platform because you get the chance to meet all different people, so that's really the way it happened. It was him talking to me. I had no intention of coming here in the first place at all." [5]*

For Participant [5] it is the conversation with another who happened to be a volunteer at Country Railway that is the key to sparking his interest. The identity work taking place prior to his retirement started re-construction of his identity as someone with no interest in railways towards volunteering at Country Railway. Somewhere in the process his identity work enabled him to retain an aspect of his previous working identity, blending elements of that identity with the new. There is added complexity, as elsewhere in the interview he says that he has a number of voluntary roles in his local community which, along with some aspects of retirement, he reflects upon:

> *"I suppose really the thing I like about it is when you retire you lose your comrades and in my roles outside of here I haven't really got comrades like here*

where you're close to each other, and I think I regained that comradeship coming here with people that's really why I enjoy it". [5]

He recounts in a prior identity as an employee having a comradeship with work colleagues, which in the other volunteer activities he undertakes does not occur. Above we noted how former railwaymen re-created identities which helped them retain elements of former railway identities, for [5] he is re-constructing something he valued in a former identity but in a different environment and context. He makes the point that the feeling of being 'close to each other' is important to him in his identity work. This would seem to require a similar identity construction by others, and a common understanding of what such closeness might be and what it entails - a complex identity work issue to resolve satisfactorily.

In this section the participants narrated issues in their decisions to become volunteers which were different for each participant, and none of them narrated the passion for a particular activity or function of the railway in the way expressed by some of those volunteering for the locomotive footplate. Some said they did have a prior interest in railways, whilst others did not. Those participants whose extracts have been used here and, indeed, all the participants from the platform with one exception, commenced their volunteering at retirement age, the exception being one made redundant close to retirement age. This presents a backdrop for a theme of previous certainties and continuities being disrupted. The identity work is undertaken to re-establish valued aspects of prior identities to provide some sense of identity continuity into the future.

Some participants came to volunteering through the involvement of other actors who redressed the non-agentic approaches recounted by the participant.

The next section will consider how platform participants came to their first management position.

7.3 What are volunteers experiences of becoming a manager?

This section explores how participants narrate issues relating to managing others within the safety-critical environment with implications for their creation or re-creation of identity. The word 'managing' as used here includes both the management of people and task and the training of others. The platform is a customer focused environment with volunteers working there expected to undertake a range of activities ranging from dealing with customer concerns and the more mundane cleaning of toilet facilities, according to their position in the grading structure.

7.3.1 Goes with the job/part of progression

Volunteers working on the platform will acquire some management responsibilities as they progress through the competence system (See Table 7.1 above). The Leading Porter position is the first level in the grading structure at which an individual is deemed competent to undertake activities classed as safety critical such as helping seeing passengers safely cross an operational railway line and despatching trains from the station. Progression beyond Leading Porter is to Station Foreman and Station Master and with these positions involving increasing levels of management responsibilities they are filled by formal application and selection processes.

The participants at the stations narrated the only route by which they came to engage in a new responsibility for the management of others was through the on-the-job progression system.

Engaging with the progression system promotion to safety-critical Leading Porter brings with it first-line supervisory responsibility. This responsibility includes training new Porters, observing that Porters carry out their duties correctly and ensuring they do not attempt to undertake safety-critical activities. Positions beyond Leading Porter are filled by application and selection. Although, having been selected for the next step on the ladder as a Station Foreman it is possible for an individual to decide to cease their progression beyond that point, as participant [6] explains:

> *"I'm now Station Foreman. I don't intend to go any further along the line. I don't want to become a Station Master .... I don't feel it's in me, put it that way. OK I can supervise people, yes, but I just don't feel like being a Station Master". [6]*

The participant has constructed an identity as a Station Foreman and has made a decision, that he has reached the limit of his progression. He recounts elsewhere in his narrative that he did not apply to become a Station Foreman, but attained the position via the now-defunct position of Acting Station Foreman, set in the hierarchy between the Leading Porter and Station Foreman positions by mutual agreement and without any selection process. He explains whilst in the Acting position he was invited to apply for the Station Foreman position, but says he found himself promoted without any process. He reflects on how he perceives interviews:

"I'm not one for trying to go through interviews and things like that. I can't get on with them…you know what I mean…. I'm just one of those people who can't get through them." [6]

Here there seems an effort to protect his identity, though he does not elaborate further and closes further discussion with the final statement. I did try probing a little further in the interview and he suggested not wanting to progress further because there had been operational changes made, which he did not explain, and with which he did not agree and as a Station Master he would be obliged to implement them. Again, he did not elaborate further and his identity work seems to be defensively focused around protection, not putting himself in situations in which he perceives some risk to his identity.

Participant [3] who moved from platform work to become a signaller, tells how this did not work out as he might have thought, and so he moved back into the platform.

"Being in the [signal] box up there by yourself all day and not talking to anybody else..... So, I then decided I liked the customer-facing aspect and being a manager at work.....I thought why not become a stationmaster and lead the team on the platform.....It's nice being the responsible person in charge and also I use that role to encourage others to progress themselves." [3]

In this telling, [3] re-constructs his identity, moving away from a position he perceived as lonely to one where he is again able to interact with others and utilise his pre-existing management abilities. This offers a view of identity re-construction, which draws on knowledge of the progression system, the alignment of existing skills with the competence requirements of a platform position to redress a situation in which he was no longer comfortable.

The Station Master oversees all platform and other station activity and success in carrying it out is supported by a, generally, competent team:

> *"I suppose a little bit of experience, managerial, in my salaried career in terms of the more senior role.... It's the people you've got with you. If you've got a lot of qualified leading porters, things almost seem to happen without asking people to do it... If you've got [a team with] less experience, then you've got to watch out to see that all the things that are happening... the Station Foreman to do more the coordinating. The Station Master just makes sure it happens." [33]*

The identity work of [33], perhaps similarly to [3], blends existing skills with new, with a view that working with a good team his role will be to oversee the whole station activity. His confidence in his identity to manage and delegate seems to be underpinned to some extent by the structured training system and a belief it does produce competent volunteers. The railway volunteer manager identity may be supported by aspects of an identity from other volunteering activities and from previous management experience in other organisations.

So far in this sub-section only volunteers from Station A have been considered and although the model of competency-based promotion applies to all the stations on Country Railway. However, from my research interviews, it appears it does not always play out in the same way. Participant [36] from Station B narrates how tasks and managing are approached slightly differently to those at Station A:

> *"I'm Leading Porter, I'm Station Master on one and two service* [working timetable numbers]*.... and there's if just two of you on a service,....nobody really takes charge of us, except perhaps on a very busy, special weekend .... We just fit in, there's no… It's quite a flat structure rather than a hierarchical structure. ... if we're not given a direction, we clean up our individual platforms, ... and we do things they don't do elsewhere. We look after the booking office, and we look after the buffet,… If we see that something hasn't been done by somebody else ..… We just step in and do it. ... I go and clean them* [tables] *and polish them. I bring my own polish, and somebody else will do something else,.... It's not like that at Station A, I know." [36]*

What is narrated here offers a rather different approach to the actual work and to individual identity construction compared to Station A. The participant's narration suggests that it is the timetable (rather than a selection process) that determines whether an individual is a Station Master or not. There are some additional tasks specific to Station B to be undertaken and he suggests that there is less overt supervision with more perceived freedom to self-manage. The participants' account seems to assume within that local framework of all the platform staff at Station B are taking responsibility for some degree of self-management. The account tells of awareness of the differences between the volunteers approaches to formal processes at the two stations. This difference is not unknown to some staff at Station A as an entry in my field notes tells of an observation made by a Station Master at Station A saying words to the effect that "the system changes when you get beyond the north end of this platform" – which is the direction to Station B.

The differences in the way the two stations are worked occurs in Participant [31]'s account:

> *"The [railway] is quite a hierarchical organisation, and we are lucky here that we have a lot more freedom, I think. I just imagine that at Station A it's much more hierarchical" [31].*

Participant [31] is identifying as volunteering within an overtly hierarchical organisation in which he is "lucky" to have more freedom. 'Luck' is an interesting word to use as possible options for what it means might include that he identifies as someone who prefers not to follow the hierarchical system as set out by the railways management, or it might mean that their actions are not observed, or if they are no action is taken. Although he is not sure – he thinks he has more freedom and imagines it is different at Station A, so perhaps he is not quite so confident in his 'more freedom' identity.

The differences were also identified by participant [30] who said:

> "*It's more hierarchical at Station A. They tend to have Station Inspectors and Foremen as well as Station Masters. We don't .. ... When there's the three of us, we just mutually agree what we're going to do". [30]*

The identity of self-managing within the broad framework is articulated again, as is his assumption all those working at Station B have the same perceptions of the way the work will be carried out.

> *"You settle down at Station A, it's all a bit serious down there." [36]*

Here Participant [36] is adding to the previous extract with 'serious' seeming to be something that is different to the approach they have at Station B. He also seems to be suggesting that formal control and process is something that might spoil the volunteering experience. The notion of the staff on duty deciding amongst themselves how they will work is a regular theme amongst participants at Station B.

The narratives are not always consistent though, as participant [30] suggests:

> *"I'm not the Station Master here. If anything, here, I'm the first among equals. I have Leading Porter written on my hat. If I'm the senior person here, it's pretty much like it is in the military because if you have two people of equal rank in the military, the person who's had their commission the longest is in charge." [30].*

He attributes first among equals as equating to longer time spent in the position as the criteria while ignoring competence.

As an insider participant observer, I probed participant [30], who was also a Trustee, asking him to explain how one would know who the person in charge of the station might be should a problem arise. The responses in his narration were that were he to be on duty it would be him:

> "....*because I've been here longer." [30]* and then he had another idea:
>
> *"....as far as I'm concerned, the person in the middle* [platform] *with a microphone in their hands is the boss" [30].*

The attribution of the person with the microphone to the public address system being in charge might seem to ignore the competence of that person to be in charge. It also pre-supposes there is someone near the microphone who is capable and willing to make appropriate announcements and that announcements over the PA system are solutions. The idea of 'boss' being the individual with the microphone removes the need for [30] to accept responsibility, potentially offering a re-constructing his identity again.

The participants at Station B seem to have one common feature in their construction of identity in that they articulate a preference for working in an environment perceived by them to give more freedom from the supposed demands of hierarchy. The merits or de-merits of hierarchy are not mentioned by any of the participants, but they express the idea that Station B is the place for them because of its relative perceived lack of hierarchy. None of the participants said they had any personal experience of working on the platform at Station A, and no-one expressed any interest in trying to find out what it was like to volunteer there.

The participants at the two stations narrated different ways of working, and different ways of managing and being managed. Identity construction and re-construction was based around an acceptance of the interpretation made by individuals in the past of different ways of working that were unchallenged.

This subsection has looked at how platform volunteers became managers and undertook first-line management at two stations and how they engaged in identity work. Both stations ostensibly operate with the same competency-based training system and the same operational processes. The narratives of the participants suggest otherwise.

Participants at Station A recount using the competency-based training system and following published operating procedures, viewing them as facilitating the successful operation of their station. Participants at Station B narrate a different approach in which they have less concern for hierarchy and more concern for self-management. What we seem to have here is both similarity and division within the same broad framework. The identities of individual volunteers doing apparently the same job in different places vary and whilst participants at Station A did not mention the volunteers nor activities of Station B the opposite occurred at Station B. The volunteers at Station B told of their speculation of what it was to be a volunteer at Station A.

I shall return to the theme of similarities and differences in my discussion in Chapter 9.

The next section will explore those volunteers who undertake additional management positions and consider the type of positions and the identity work associated with multiple positions.

7.4 How do volunteers engage with multiple position holding?

This section is divided into two sub-sections, the first will look at attaining an addition position by application, the second attaining a position following an overture made to a volunteer or that volunteer making an overture to another.

7.4.1 Pursues Opportunities

There are many different reasons why an individual may choose to hold to hold multiple positions, which might for example include thinking about an anticipated future identity. Participant [33], a Station Master, explains:

"I started on the platform. For a short time, I did TTI (Travelling Ticket Inspector) until I'd qualified as a signalman. And then, there wasn't enough time to TTI and signals so I worked my way through to qualify for all three (signal) boxes, because they're all separate.

I also qualified as a Booking Clerk. I partially did that because it's useful if suddenly there's one booking clerk and a queue out the door. And secondly, it's my long-term retirement plan. When I can no longer stand on the platform or work signals, I'll go and prop up a chair in the booking office and sell tickets." [33]

The participant narrates a carefully thought-out plan for his volunteering, actively seeking a number of different positions. The signal box training requires familiarity with signalling techniques and an understanding of the particular demands of each signal box in their different locations across Country Railway. Training to become a Booking Clerk had a distinct purpose, relating his anticipation of his identity moving from being a physically capable individual to possibly experiencing mobility issues in later age. In his narrative, and through the actions he has taken he is protecting his future identity able to continue volunteering after age-related physical wear and tear have an impact. This anticipated future identity is underpinned by a wish to carry on volunteering for a long as he is physically able. Another participant with a less well thought out plan told he would carry on volunteering on the platform "until my knees give out" but narrated no further intentions or plans.

An interest in another position might be explored to establish whether it is something to pursue, as participant [7], a Station Foreman, explains:

"It's something I was sort of interested in. I had a couple of trips up with Guards who were also people who worked on the platform and I thought, 'Yeah why not' – I'll give it a go, something different. It beats cleaning toilets! You know, it's just another feather in your cap. And it broadens your experience. And it does, it's opened up a whole new world to me and gives you a better understanding of what, not other departments but what other people do." [7]

For the individual taking the opportunity to find out more about a different position of which they know little possibilities open up for the re-creation of identity. The identity work here is of an individual willing to try something different and new and who recognises what the broadening of knowledge and experience can to add to his identity, and provide a foundation to possibly open other management opportunities.

A different approach to obtaining an additional role through agentic activity was narrated by [30]:

"I'd had some success [in another organisation] with [a particular money-related activity]. And I volunteered, offered my services but, in the way of Country Railway, they're not very good, very often, at taking up new people. Nobody paid any attention. So, I actually stood for election against the person who was running it, not that I wanted his job; I just wanted him to acknowledge I was there. Unfortunately, he decided it was a good moment not to do the job anymore and he took one pace backwards and I found myself standing out there on my own." [30]

The identity work suggested by [30] is complex and has several strands. [30] recounts for reasons he does not explain his offer of his services, but it seems not unreasonable to assume he did so because he identified himself as better than the incumbent. Not having received the attention or acknowledgement he considered his offer deserved, he initiated action to contest the incumbents right to hold the position. We do not know why the incumbent decided to stand down, but we are told he did, leaving the participant as the sole candidate for the position. The narration by [30] strives to put him in the position of the good guy with the better experience which he felt should have been obvious to all involved so he could help the incumbent ("not that I wanted his job"). In the event his action was to directly contest the incumbents' continuation in office.

The narratives of participants [7] and [33] recount how they pursued opportunities that were known to them, although not in response to formal advertisements. Participant [30] narrates a very different approach using the formal system for electing Trustees as a way to achieve a position he identified himself as being competent to hold. Each narrative shows thought-out, but different, reasons for pursuing multiple positions with the participants using an agentic approach to achieve their aims. They were already in management positions and the addition of other positions creates the need for further identity work as they reconcile the temporal salience they attribute to each activity. Interests and identity may evolve over time and the balance re-adjusted – we saw above a participant who having found signalling a lonely experience continues to use that skill but gives less time to it and more to his platform activities.

7.4.2 Invited/approached by another person

The opportunity to hold an additional position sometimes comes through the invitation of another.

> *"I've never been a Trustee, but I was approached two and a half years ago by a Trustee.... as somebody who was thought to have the right ideas, the credentials, knew a lot of people, who, I was told, was highly thought of by other people." [1]*

Participant [1] does not narrate how the approach by another was made. He recounts the story in a manner favourable to himself and his identity, acknowledging that he was told of his favourable attributes through the opinions of un-named others'. Identity construction is set up from the start as someone with the necessary attributes ("credentials"), his years as a mainline railway employee, for the Trustee position. He became a Trustee but not everything in the garden was rosy:

> *"At times we think ' Why are we doing this, keep banging your head against a brick wall?' It just actually makes us more determined to get it right!" [1]*

Whilst the Trustee position has significant overall responsibilities it involves having to work with other individuals and [1] is trying to make a difference to the way Country Railway operates. His identity work includes questioning why he continues with a challenging task against the difficulties but justifying continuation by proposing his determination to succeed. His narrative reinforces this determination, and he re-constructs his identity to include managing others holding perspectives that are perceived by him as negative:

> *"There's still some about but we're chipping away at it all the time and that's what drives you forward. If you didn't have that, there's no point in doing it. I'm not giving in." [1]*

The Trustee position in Country Railway, as in other organisations, is exposed to criticism by others and the identity work undertaken by participant [1] is complex as he presents himself as determined. There is also an undertone of what he might perceive as a threat to his position, and as a means of reinforcing his identity he presents an identity in which he narrates he is not prepared to give way.

Having already accepted one management task, gaining Arts Council accreditation referred to above, [36] narrates how:

> *"I've been busy with that, and as a result while that was going on, [a Trustee] said, would you be prepared to be a Trustee, and help us, take us through, and set the railway right for the next 20 years? I said I'd be happy to do that." [36]*

The participant in his identity work was looking for things to keep him occupied and the identity he narrates suggests the confidence he has in his abilities to take on a Trustee role with a challenging brief. The participant also explains how he manages multiple positions that are different in their substance:

> *"I actually compartmentalise them, in a way. And so, certainly at [Station B as a station staff member], I don't introduce the trustee role at all, unless I'm asked, or approached." [36]*

Having multiple positions his approach to dealing with conflicts which may occur is to use his identity work to keep the two positions separate as much as possible. The boundaries he draws between positions are clear and he compartmentalises each position to protect himself and to avoid identity conflict.

Approaches are made to individuals because the others making the overtures consider the individual has something to offer the railway. The story narrated by [43] has a temporal aspect with two separate overtures made to him:

> *"It was [named individual] who used to attend those meetings* [in a commercial department] *and said, 'well, why don't you go along you've got a commercial background, why don't you go and have a listen?". [43]*

He responded to this invitation and made some suggestions that were taken up by the railway. Sometime later he was approached again by a senior member of the volunteer management team:

> *".. [name] approached me and said "Had you considered offering yourself as a Trustee?" The answer was, I thought, oh yes. I was still probably 60 then, so I said, 'Well, I've got a few years ahead of me yet'. So, he said, put yourself forward and I did. There was a contested vote that year… I can't remember if there was six of us going for four places, but the answer is I came fifth, so I didn't get a place. But one of the trustees stood down during the year so I was co-opted in and the rest is history." [43]*

Having been invited to attend a meeting the participant says he demonstrated value to the railway by coming up with new commercial ideas, which was recognised by others, leading to the invitation to become a Trustee. His identity work included recognising his willingness to take on the position and commercial skills, which were reinforced by some successful new initiatives. When approached, one factor he considered was his age, with his identity work suggesting he had time ahead to undertake a more demanding position for some years. Although his sponsor invited and he accepted the idea of becoming a Trustee, the particular time meant that an election was undertaken before the position could be confirmed. He was not successful in the election, his identity re-construction delayed but seemingly not damaged by election failure, but subsequent co-option and delay caused by the process ("the rest is history").

A complex thread is woven through the narratives of these participants. They re-create their identities to allow them to deal with the requirements of the different positions, be it an operationally separate job, or a more senior position as Trustee. Issues such how to distribute their available time among the different positions are overlaid with the demands and expectations of others. Mostly the participants became involved in the Trustee positions as a result of the overtures of others. The operational positions were filled through the participants agency.

7.5 Conclusions

The participants from the stations who worked on the platforms tended to show a rather reflective approach to the start of their volunteering with Country Railway. Starting volunteering in later life when retirement, or early retirement, created the time to undertake voluntary activities. Many had been interested in railways throughout their lives but volunteering was not salient until other life goals had been achieved. Some participants brought prior experience of the railway industry to bear on their volunteering, holding on to elements of a prior identity whilst re-constructing a heritage railway identity.

Platform staff undertake structured competency-based training as a part of their position is deemed to be safety-critical. The achievement of safety-critical status then takes them into a first-line supervisory position. Individuals can choose to not progress to the supervisory position although most do. The progression system is structured hierarchically with activities and responsibilities assigned to specific positions. The participant's narratives recounted a fracture in the formal hierarchical system between the two stations. Station A follows the system as it is set out, Station B has more flexibility, narrated as self-management, with a more flexible approach applied to individual position in the hierarchy; although how this plays out in practice was less clearly narrated. None the participants at Station B with the more flexible approach recounted why they adopt that approach – except to say they would not wish to follow that of the other station.

Several volunteers at both stations chose to work in additional positions, some having additional operational positions requiring training in different competences, others becoming involved as Trustees. The former used agency to achieve the positions they undertook, whilst in most cases those who were Trustees came to the position through the overtures made to them by others. The one exception used agency to oust an incumbent Trustee.

Overall, the narratives of the participants were complex, with identity work undertaken to re-construct and construct, and sometimes to protect, identities that co-existed in different positions.

7.6 implications for the research questions

Following the format used in section 6.6 this section explores some of the underlying patterns and implications found in the narrations of participants in this research.

7.6.1 In what ways are routes into volunteering navigated?

My analysis found that unlike the steam locomotive footplate volunteers none of the station participants narrated joining Country Railway at a young age. Participants joined either at retirement, or less frequently in mid-career, in the process making considered and planned decisions to undertake a customer-facing volunteer position. Whilst Country Railway was an organisation that attracted them, the activity sought was one where they could engage in interactions with passengers to help make the experience of travelling on Country Railway a pleasure. I found that most brought experience of working closely with, supervising, or managing others from their paid work context. They were thus more familiar with situations where interaction with others played a significant part, and with the boundary between paid work and volunteering being porous, facilitating boundary crossing and skill transfer.   A few narrated prior paid work experience in the railway industry creating different boundary contexts exhibiting issues of liminality as individuals seemed to hesitate at the boundaries. From my analysis I find that a degree of familiarity with Country Railway was a precursor to choosing to volunteer and that familiarity was navigated into volunteering often by having enthusiasm for heritage railway preservation or occasionally nothing deeper than having experience of Country Railway as a passenger and thus being enthused to volunteer.

7.6.2 What are volunteers experiences of becoming a manager?

In a similar manner to the steam locomotive footplate crew station volunteers narrated undertaking a competency based training programme in which progression beyond the lowest grade leads to a first-line supervisory position. My analysis found following this well-understood pathway was felt to be satisfactory.

The analysis shows the pathways to management positions on the platform differ slightly from those experienced by locomotive footplate crew noted in section 6.6.2 above. (My analysis of what I describe as the pathways to management positions is explained further in Table 9.1). The first-line supervisory position, that of Leading Porter, is an automatic progression from successful completion of the competency-based training programme. However, beyond this first-level position subsequent progression into management grades is by individual choice and selection.
My analysis found a significant difference in the narrations of experience between the two stations in this research. Participants at Station A narrated their experience to be that of following the requirements of the competency training programme, whilst participants at Station B narrated their experience differently. They adopted a more flexible approach to the competency training programme structure, implying that beyond the Leading Porter position, a higher graded position at Station B could be filled by whomever was available at the time. Thus, this by-passed the need for selection and training for higher graded positions. The participants at each station narrated their approach as the correct one to be followed, identifying themselves as a different group from the volunteers at the other station, thus creating boundaries between the groups and requiring identity work to protect their particular identity, as neither group chose to engage in boundary exploration nor crossing.

7.6.3 How do volunteers engage with multiple position holding?

My analysis shows that those station participants holding multiple positions within different departments, or as Trustees, narrated differing pathways to engagement. Those volunteering within different departments were in positions in which they had developed an interest, and had applied to work. These were often skill-based positions such as Guard or Signaller, and they undertook relevant training to achieve the required competence.

Volunteers holding Trustee positions had travelled a variety of pathways. It is of note, and applying not only to station volunteers but to all participants in this study, that whilst holding multiple positions in different departments usually required further training, my analysis found no participant had engaged in training specifically for the Trustee position.

The next chapter will explore the participants in the study who are based in the workshops.

CHAPTER 8: RESULTS – A LOOK INTO THE WORKSHOPS

This chapter will consider participant volunteers who are based in workshops. The categorisation of being 'based in the workshops' is derived from where they offered themselves for interview and where much of their work is carried out. The chapter is structured as follows: Section 8.1 presents an overview, Section 8.2 considers how volunteers started with Country Railway, Section 8.3 considers how they became managers for the first time, Section 8.4 discusses how those in management positions come to be in multiple positions, Section 8.5 draws conclusions from the chapter, and Section 8.6 considers the implications for the research questions.

8.1 Introduction: A look into the workshops

Most of Country Railway workshops are located in the same location as Station B, although they are not directly associated with the station and its activities. However, the locomotive workshops are located at Station A. The workshops in total cover a considerable area with some having associated buildings for storing railway vehicles. A shed for storing carriages is in the process of being enlarged to provide additional storage capacity. The volunteers managing and working in the workshops have a range of craft skills sometimes brought into their volunteering from other work activities elsewhere, some they have developed as volunteers.

The locomotive and the carriage and wagon workshops are overseen by paid managers and have some paid engineering staff, alongside whom the volunteers work. The signal and telegraph workshops and the one described as the 'metal-bashing' workshop are managed and run by volunteers. The workshops produced the least number of participants (seven) in this study, resulting in less data from which to draw for the analysis. Nevertheless, the participants in the workshops add further insight into answering the Research Question: "How do volunteers navigate the experience of becoming managers in a safety-critical environment?" The previous two chapters have shown volunteer participants engaging in first-line supervision as an outcome of moving through a progression system. In the workshops, whilst many individuals are skilled and maybe develop further skills, progression to a management position is mostly through individual choice.

The chapter will begin by looking at how participants started their volunteering with Country Railway.

8.2 In what ways are routes into volunteering navigated?

The participants recounted several different ways in which they became involved. The first to be considered are those who were enthusiasts, followed by those who were generally interested and, finally, those who discovered the railway and its activities.

8.2.1 The life-long enthusiast

Enthusiasm for involvement in the heritage steam railway environment of Country Railway sometimes started when young and did not necessarily involve going into a workshop at the start of volunteering. Participant [42] was introduced to the railway at a young age by an older brother:

> *"I blame my older brother. He came for a visit here in 1969 or 1970 with a friend of his when we were living in South London, and he said, "Oh, I'll take you down there." I think I was 13 at the time, and I thought, 'This would be fun to come down and do some volunteering', so that's what I did. I started off working in the bookshop at Station B." [42]*

Participant [42]'s older brother had a car, and when he was not available to drive him to the railway, [42] travelled on three different bus services to get there, narrating an early commitment to the railway. His narrative tells how he started his volunteering and later recounts that having established volunteering was for him:

> *"I got involved with the Carriage and Wagon department and used to basically live here down in the summer, school holidays, until I went off to college. I still came back actually during the college holidays and some weekends." [42]*

His early identity seems to have included having some fun in an adult-focused environment that was different to that of school. The early experiences were consolidated into an identity of a committed volunteer who was willing to give considerable amounts of time to Country Railway. His narrative does not enlarge on what his understanding of railways or volunteering was prior to being introduced to the railway; his initial introduction was sufficiently engaging for it to become a lifelong activity.

Participant [35] also joined the railway as a youngster:

> *"It's the story of how I think most people started in the old days anyway.... since the closure of the line* [by British Railways] *.... until the opening day when I first came. I came with a group of friends. We couldn't see anything because it was so crowded, but we came back a few weeks later when it was a bit better, and thought, 'Wow, this is interesting; there's all sorts of things we can do. We can play trains.' As school kids, it was a big attraction, so we started to turn up and basically get involved." [35]*

Participant 35's arrival at Country Railway was with a group of, presumably, like-minded school friends and he became enthusiastic about the possibilities that becoming a volunteer could open for him. His narrative tells how they were allowed to get on with a number of things such as mending fences, repairing broken windows, painting, cutting hedgerows. He identified as being within a railway environment and able to do different things ("play trains") which opened a whole new world of potential volunteering activity. In his narrative he recalls how later he and his friends became involved in carriage restoration and maintenance work. However, he relates that after a period of some seven years gradually things began to change for them when others with more skills became involved as volunteers:

“Then dedicated teams of carriage restorers started to appear and we were basically made redundant. Well, not so much made redundant, but they had better skills than we did, so we let them get on with it basically. The skills that we’d got included a fair amount of metalworking, so we transferred ourselves to a new base at Station B, and from then until now we’ve provided metalworking skills for the railway” [35]

The arrival of more skilful people led to him and volunteer colleagues being eased out of the carriage maintenance and restoration activities. He does not say how old he was when he started his volunteering, but by the time he moved on was possibly in his later teens with identity work in progress to aid the change of activity. He protects his identity to some extent by proposing “we let them get on with it” as opposed perhaps to being made redundant to give himself apparent agency. He remained a volunteer at Country Railway with his enthusiasm continuing and says that he and some of the original group together with some skilled volunteers formed the nucleus of the group he calls the ‘metal bashing’ gang. The youthful enthusiasm has continued as has a loyalty to the ‘gang’:

“We’ve been doing this sort of thing for many years. That’s the practical stuff, the dirty hand stuff. The rest of it, most of the gang.... we’re trying to keep our heads down and just get on with the work, just enjoy what we do,” [35]

His later identity continues with the enthusiasm and loyalty to the ‘gang’ and getting enjoyment from the activities he undertakes. There seems to be some re-creation of the freedom he articulated in his earlier identity, with the idea of “keeping our heads down and just getting on with the work”.

Participant [38] also joined as a teenager - the story he tells of how he first got to know of the railway:

> *"Anyway, I had a friend who was similarly minded* [interested in railways] *and he suggested one day, he said, "You heard of this line that's due for closure soon? I think we ought to go and have a trip on it" and it was him that suggested us going on this trip." [38]*

That proposed trip, although in the event did not take place, ultimately led to him joining the railway as he was enthusiastic enough to attend the first meeting called to see whether the line could be preserved:

> *"I'd always been interested in railways, their infrastructure in particular .... The inaugural meeting, and to which I went and signed on the line. And paid my £1. I turned around to the Treasurer's table immediately behind me, put the £1 on the table." [38]*

Participant [38] tells of an early interest in railways yet it was another who suggested what would in the future become Country Railway as a place to visit, thus opening the door to his participation. His enthusiasm led to him becoming one of the first members of the preservation group when it was set up. He identifies as a reasonably knowledgeable enthusiast who at the time of joining the railway was a teenager. Elsewhere he refers to things learnt in his full-time working apprenticeship, which led him to be an enthusiast with some deeper knowledge of railways – "infrastructure in particular". Whilst he does not mention the 'fun' of the previous participants, his enthusiasm seems demonstrated by his paying a membership fee to the preservation group before the inaugural meeting had finished.

The enthusiasts in this subsection were introduced to the railway at an early stage in their lives and maybe it is not surprising that it was another who effected the initial introduction. For two of the participants, having fun ("playing railways") was part of their early identity work, encouraging them to stay and explore the opportunities presented, and finding new opportunities. One participant, a little older and working for an employer as an apprentice when he started volunteering already had an understanding of what it was in the railway that interested him.

8.2.2. The generally interested

Other participants who had a less strong interest in railways did not begin to volunteer at Country Railway until later in life. Participant [27] had been an interested and supportive but an inactive ('armchair') member of Country Railway for a long time but thought about becoming a volunteer and planning for his entry into it. As a member of Country Railway, he paid the annual subscription which he said provided some financial support to the railway and, in return, was kept in touch with the activities of the railway via a regular newsletter. This kind of involvement possibly reflects the experience of the majority of the Railway's 10,000 members.

Having been a long-standing member he says he had some understanding of the activities for which he could volunteer and made a specific choice.

> *"I've been a member of the railway for probably about 25 to 30 years. When I retired, I decided that part of my retirement would be, now I've got the time, to become a volunteer and actually do something rather than just be an armchair*

member. So, I decided to come to Carriage and Wagon because I thought that I would quite like to get involved with woodwork."   [27]

Retirement from his full-time paid work meant he then had time available and the desire to become an active volunteer. He does not say what the level of his woodworking skills were and, elsewhere in the interview, he says that his full-time job was in retailing - nothing to do with woodworking. He observed, rather dryly, that he thought there was not much opportunity to use woodworking skills in the Locomotive department! So, he joined the carriage and wagon department to commence his volunteering using the woodworking skills he had.

Taking up volunteering in something that one has been interested in for a long time is not uncommon, as examples from the locomotive and station chapters have demonstrated. The move to volunteering involved identity work to make a transition from simply having an interest in the railway with some possibly useful skills, to an becoming active volunteer contributing and using those skills. A new volunteer with a long-standing interest might know sufficient to identify where to start volunteering, sometimes participation may open previously unknown avenues of volunteer activity, as was the case for [27].

Having started volunteering in the Carriage and Wagon department to do woodworking, after a while he was invited to consider upholstering:

"[The manager] said, "Have you ever thought about upholstery work, trimming, carriage trimming"? So, I said, 'No', not quite knowing where he was going with this. Anyway, it transpired that at the time, there were two ex-British Railways works trimmers, both in their early eighties, ... and he was very concerned that

there was nobody on the railway or in the department to shadow them. And therefore, when they retired, which was obviously fairly imminent, nobody else had their skills. Effectively, coach trimming on the railway would die. So, being a new volunteer, wishing to be bright-eyed, bushy tailed and eager to please, I said, 'Well, I'll give it a go.'" [27]

This approach was made by the paid workshop manager, who was engaging in some succession planning to avoid a loss of skills when some members of the workforce retired. Participant [27], although having retired from a full-time career and being a new entrant to volunteering, seems to have chosen to identify himself as a keen volunteer willing to try and learn something new. In his identity work he re-constructs himself from a retiree to someone with characteristics of someone younger ("bright eyed and bushy tailed") with the energy and time to learn new skills. No longer an aged retiree but seen by himself and another, the workshop manager, as someone still capable of development.

Participant [27] did not join the railway with an ambition to become a Carriage Trimmer he was unaware of the job and, therefore, had never even thought about it. Through an identity lens the participant wanted to become a volunteer woodworker and was prepared to re-construct his identity further to undertake the training to become a specialist with a very specific craft skill. Participant [27] demonstrates a transition from paid employment to retirement, when time becomes available to do other things - in this case to become active in an organisation that has been a long-standing source of interest.

8.2.3 – Discovered it

Some volunteers in the workshops joined Country Railway without narrating they had any prior interest or particular knowledge of it, thereby separating themselves from the enthusiast and those with a longer-term plan to volunteer.

Participant 28 does not say he had any particular interest in the railway but knew of it because he lived locally:

> *"Mainly, because I live local to the railway and I always have, so it's always been part of our existence in our local area. And then, retiring, needing something to do really. Another focus for my energies and that was it. My daughters said "We'll buy a membership and you go and volunteer". So that was it. .... I just came down and it was woodwork and it was something that I enjoyed fiddling with. So, yes, I joined in with the gang and that was it. I volunteered." [28].*

Living locally, this participant says he was aware of Country Railway but had no involvement. With retirement bringing the availability of time he identified as someone wanting something to do to fill time and still with energy to use. His narrative leaves open a question about his interest in, and how much he really knew of the railway, and how skilful his "fiddling" with woodworking really was. In his story he does not speak of agency - the actions of others led to his volunteering. His story could be seen as one where he was pushed by his daughters to go and find something to do to fill his time in retirement. In addition to the practical aspects of woodwork he suggests that joining "the gang" and being accepted by them, was some part of his identity work.

Retirement has been a theme in the reasons for becoming a volunteer, but this is not always the case. Participant [32] was looking for something to do but a long way prior to retirement:

> *"so it's local history, sort of thing. My husband and I, years and years and years ago, used to come up and wander around this area, and we decided at some point that we might just get involved." [32]*

Participant [32] does not express prior enthusiasm for, nor a general interest in, the heritage railway, and was in full-time employment elsewhere. She and her husband sometimes wandered around the countryside close to where the workshops were located. At some point, and for reasons unexplained, she and her husband decided to volunteer, starting in the locomotive department. They later moved to work on the restoration of one of the stations and, later still, became interested in carriage restoration and joined the Carriage and Wagon workshop.

Whilst a volunteer in the workshop, she heard of an opportunity for paid employment in the Carriage and Wagon workshop which interested her and also, apparently, her husband, which led to them undertaking some complex identity work challenging their existing paid jobs and life style.

> *"I was looking to get away from my job. I worked in an office in central London, I'd been there about five years and I was fed up with commuting. I was trying to get a job more locally, but at that point you just couldn't get a sensible job locally. This vacancy* [in the Carriage and Wagon department] *came up, and my husband said, well, one of us might as well do what we want to do, so I applied for it and got it." [32]*

A desire to change job, cease commuting and work locally is, perhaps, a not uncommon trigger for identity work. In Participant [32]'s situation there is the unknown aspect of what a "sensible" local job for a commuting office worker might have been. What is clear though is that the possibility of working in the workshop was something she and her husband found potentially sufficiently satisfying for them both to be interested in it. What is unsaid is how the decision about which of them would apply for the job came about, although she claims agency in applying for it successfully. On taking up the paid position she tells how one of the paid staff there told her she "wouldn't last a winter" because:

> *"The old shed didn't have doors on the south end, there was certainly no heating. There wasn't much of a door on the north end, it was just a bit of flappy, plastic stuff, and it was freezing in winter".[32]*

Despite that apparent challenge she is still there thirty years later, and the old shed has been replaced by a much better new one. Although an employee, and now a supervisor, she continues to volunteer in the workshop.

This section has shown how the participants who are volunteers in the workshops narrate how they came to their volunteering in different ways, and that there is no one particular route to volunteering. The narratives cover a complex range of reasons for becoming a volunteer from youthful enthusiasm to filling time after retirement, having a long-standing interest in heritage steam railways, to having no initial interest at all. The Research Question addresses the re-construction of identity when starting to manage other volunteers and one thing found from the narratives is that the starting points for such re-constructions embrace a multiplicity of different reasons.

The next section explores their narratives of approaches to managing other volunteers.

8.3 What are volunteers experiences of becoming a manager?

This section focuses on how participants narrated their approaches to becoming engaged in activities that entailed the management of other volunteers. There are no examples in the workshops where engaging in management is an integral part of progression within a job grading structure.

8.3.1: Applied for or offered a position

No participants in the workshops related that they joined Country Railway specifically to undertake a management position. Initially for some, their volunteering activities revolved around the craft skills they either brought with them or developed.

Participant [28] tells an interesting story:

> *"The team lost a leader and an organiser. So, I filled that role because I'm just keen to do that. And it was just a question of, well, 'Can you talk to the management?' And get this done and get that done which I did." [28]*

He was undertaking practical work on a wagon restoration project when an opportunity arose to take charge of the team. It is not clear from his narrative whether he was specifically asked if he felt confident to "talk to the management" or whether he narrates it as a rhetorical question to clarify his own identified confidence in this aspect of management activity. He appears not to have hesitated; his narration suggests he identified as being keen to lead and organise. A little later in his story a further opportunity arose when the railway was trying to obtain external funding for a project. He tells how an earlier railway project had received funding but all had not gone well and

> *"[funding body] came back and took the money away and said, "No, you're not doing anything with it. Give us the money back" .....We had learnt a lesson from that and they [the prior management team] were then prepared to implement some project management. And I'd put myself forward as part of the team when we were going to gather the funds and said I'd be the Project Manager. We got the funds and then I needed to be Project Manager." [28]*

The lesson learnt by the prior management team about the need for proper project management provided the opening for [28] to offer his own project management skills and experience. Becoming involved in preparing a new and successful funding bid had provided him with the opportunity to re-construct his volunteer identity using his prior identity as an experienced project manager. His narrative suggests nothing other than confidence ("I'd put myself forward") in his identity for the work ahead.

Elsewhere in the interview he narrates some of what he sees as the background to support his confidence:

> *"I had been a Project Manager in the [named] industry for a number of years. So, I'd taken teams of people abroad and spent years living in the States managing teams of people. And so, I'm a natural busybody wanting to get things organised. And I have some project management skills." [28]*

His narration tells of someone who wants to organise, though he sets this up in a general sense leaving the nature of the "things" to be organised open. He identifies as having project management skills, and maybe attempt to manage the expectations of others by including "some", perhaps providing some protection for his identity should the project he manages not work out as well as hoped.

In the course of the interview, the participant details how, having taken on the project manager position he put in place the necessary processes and recounts his approach towards managing people:

> *"And people give you the respect because you've got the expertise, or you've got some charisma about you. They naturally accept you as a leader and that just happens. .... Today I had nothing but interruptions which are all valid interruptions. There are people saying, 'Well, can you take a decision on this? Can you take a decision on that?' And I don't know what it is but it's somehow the ability to take those decisions and stick with them and see them through." [28]*

He self-reports he has the respect and acceptance of others although he recounts this in a more generic sense ("you"), moving away from the agency ("I") he mostly takes when discussing his actions. He continues the theme of being accepted as a leader, having described charisma and expertise as two things he thinks a leader has, he protects his identity by not attributing the existence of those things directly to himself. He does return to agency with his description of part of what he does (”nothing but interruptions") requires being asked to take decisions. His narrative does not say by whom he is being asked for decisions, leaving open the scale, scope, and importance of the decisions he is being asked to make. His reflection on taking decisions is somewhat circumspect ("I don't know.....it's somehow") not directly owning the process, and providing some potential for damage limitation to his identity should it be needed in the future.

His experience of managing volunteers appears to have been coloured by the first job he was keen to take on as team leader:

> "*When managing volunteers, we found a big problem in two aspects. One is that people would turn up as a volunteer and they'd maybe come down from* [a named town]. *It's a miserable day and they've come in and they stand inside the door and they say, right, what am I doing today? And you think, 'God, what am I going to give him to do', Right and if half a dozen of them turn up and keep coming up to me and saying 'What am I going to do', you run out of ideas. They get pissed off by lunchtime and they go home. And you may never see him again." [28]*

In this extract [28] is reflecting on his first position in which he became responsible for the management of other volunteers. The problem described and his approach to solving it is interesting, initially because he does report himself identifying as a volunteer arriving to work and having nothing to do was a problem he had experienced. Now as a manager of volunteers, he is challenged by the allocation of work activity to the volunteers. He undertakes identity work to review his understanding of the capabilities of volunteers with a range of skills and abilities, and of his knowledge of the tasks to be undertaken. It might seem the identity he expressed as a competent manager is at risk unless he can address the problem successfully. From the previous extracts he recounts he blended his prior work experience, his understanding of the requirements of the management process ("implement some project management") with how volunteers might respond to poor management, ("they go home") in order to create a solution (successful project management) and protect and reinforce his re-constructed identity.

Sometimes becoming a manager may take a slightly unusual form. An example of this relates to the "metal bashing gang", also known officially as the [founder's name] "gang". Participant [35] tells how this gang works:

> *"We call ourselves the* [founder's name] *gang, we're trying to keep our heads down and just get on with the work, just enjoy what we do, ... It's a commune, yes. There's nobody actually running it as such. We have a guy who has always done the paperwork for us. He's our, sort of, administrator, but he doesn't run it. We decide between us what we're going to do, and when and how........But we don't say, we've got a manager and he tells us what we've got to do, because I think none of us would be there*. "[*35]*

This may be a rather unusual approach towards management with the participant's identity work encompassing and blending the actual work and those individuals within the 'gang'. The notion of a 'gang' seems to imply a shared commonality of perspective among the members and the use of the word 'commune' seems to suggest his perception of an acceptance of norms by the other individuals within the group. Acknowledging there has to be some acceptance of organisational systems the 'administrator' makes sure whatever paperwork is required gets done although how this is achieved is not narrated. This would seem to be aimed at keeping others within the overall management system at bay. Enjoying the work he undertakes and being left to his own devices play a significant part in the identity construction of [35].

The view of the gang as recounted by [35] is to be self-managing and not have a formal management structure, with management, to some degree, the responsibility of every member of the gang. Reflecting [35] presents a strong case for self-management by suggesting that he and the other members of the gang would leave if faced with a requirement for formal management, although what 'leave' means is not explained. Perhaps he is suggesting to the listener a collective threat that the work undertaken by the gang would cease, or even involvement with Country Railway might end.

Another participant, also a member of the "metal bashing gang" and also a Trustee explained the situation slightly differently:

> *"When he died* [the named founder]*, it became a cooperative because no-one particularly felt they needed to be in the lead when you've got a group of fairly like-minded individuals where we get on really very well, where we know what the job is, and we plan it out between us." [42]*

The participant narrates the gang as a cooperative team because what he describes as a group identity of capable individuals, competent to get on with their activities the narrator suggests the 'gang' perceived there was no need for a new leader. Participant [42] does suggest though more structure with some element of planning involved. The 'gang' as a social structure view themselves as wanting no outside interference in their self-management process.

The vacant position created by a volunteer's departure was filled by an existing member of the workgroup. There seem to be two elements to this, one being that the individual had the necessary skills, the other that they identified as being comfortable dealing with other managers and management processes.

A different approach applies to the "metal bashing gang" in that on the departure of the original leader participants narrated all the gang seem to have considered that they met criteria for leading and so chose not to replace the departed leader with one person but instead with all of them operating as a cooperative or 'commune'. In this study we have the narratives of two members of the gang setting out this scenario and they narrate the other members are of the same view.

8.4 How do volunteers engage with multiple position holding?

In this section those volunteers undertaking additional positions will be explored. Some participants pursued opportunities as they arose whilst some other said they were invited by others to consider an opportunity.

8.4.1. Pursues opportunities

In this subsection the use of agency by participants either to pursue possible further positions or to create positions will be explored.

Participant [37] saw an opportunity for Country Railway that he considered was not being addressed and so set about creating an additional position to undertake without any prior authorisation. This arose from his interest (external to Country Railway) in the use of the internet from his discovery that a university was constructing a website for the Heritage Railway Association to make information available to its members via the internet. Using data from Country Railway's timetables and other documentation he sent data about Country Railway each year to the university to be included on the website.

> *"The railway itself wasn't that interested for the first couple of years. [Therefore] I, basically, took the printed leaflets and turned them into webpages." [37]*

In his narrative he recounts how he and an unnamed other, or others, decided Country Railway should have a website of its own and, through the good offices of a different (unnamed) university, began creating a site. These were the very early days of the web and he notes that universities were ahead of the game at that time. He reports little interest within Country Railway for the website. That was until a film company entered into a lucrative contract with the railway to use its facilities for filming. Participant [37] claims the website played a significant part in winning this contract as the film company said they were able to use his website to do a lot of their research about Country Railway before making an approach.

This, he says, led to the railway wanting to set up its own official website but he says he was not invited to create it and reports, with some disillusion, *"they ignored mine."* He and the unnamed others continue to run their website separately from the official site. As a self-appointed webmaster with a self-created project in which he is deeply interested, he re-creates an identity of determination to succeed and see the project through to a successful, albeit officially unrecognised conclusion. Despite the potential conflict between the railway and the unofficial website, the two sites appear to have co-existed in some kind of truce.

The complexity of this individual's multiple activities increases, as participant [37] also volunteers as a Steward on the Santa Special Trains and on some catering trains, engages in an annual track work week, organises guided tours of the carriage and wagon shed for visitors and is a fundraiser. He is an unusual example of someone undertaking a multiplicity of activities, although maybe they are not all quite as disconnected as they might appear at first sight. He became involved in trying to raise funds when there was a particular carriage requiring funding to enable its restoration to go ahead and those who wanted to do the restoration having no funding provided by Country Railway had to raise their own funds by whatever means they could. He approached the Country Railway's separate fundraising Trust, but it was not able to offer support. He considered the Trust's fund-raising ability could be improved and sought improvement by deciding to stand for election as a Trustee against the incumbent:

> *"Up to that point the trust had raised £5,000 a year perhaps and not done a great deal.... and during that time* [he was a Trustee], *the Trust's income has gone up from £5,000 a year to £1 million a year. I can't take all the credit for that, but I must have helped." [37]*

There is complex identity work taking place here to achieve a short-term goal, raising funds for a restoration, and a much longer-term goal of bringing more funds to the railway for more restoration projects. Those determined aspects of identity noted above seem to come to the fore again. The participant seeks to oust an incumbent Trustee because of his self-belief that he can do better and in his narrative, he says that the decision to undertake the variety of other jobs noted above was made in a considered way to make him a more familiar figure to a wider population of railway members prior to standing for election. He tells of being successful in the post of Trustee, evidencing it with the huge increase in funds raised, although his narrative recalls a determination to create a significant difference adapting his role to "playing a part". He does not give much information about how his decisions are made and credits what he does to:

> *"Just keeping your own ears open, talking to people about what they're doing, being interested in what they're doing." [37].*

Complex identity work has been undertaken by this participant which might be seen as being driven by a desire to get things done differently through engaging in multiple positions and using his energies in creating his own opportunities.

Participant [42] is another member of the "metal bashing gang" who is also a Trustee. He recounts his reason for becoming a Trustee:

> *"I think I decided that I wanted to understand quite how Country Railway managed the business because I came to the view that things weren't entirely happy and that there were, frankly, a number of trustees that really weren't very good, and actually, were dragging Country Railway down. And I decided that I would have a go at trying to make things better. Using my experiences both inside Country Railway and externally…" [42]*

His identity work was to understand the management process of Country Railway which he believed could be improved, although in the recounting he adds a modifier ("I think") leaving the door open to some other possible reason. He is agentic in getting to the position of Trustee, not recalling having an overture made to him by another. Given the views he expresses about other Trustees it might seem unlikely he would have been the recipient of an overture. He continues:

> *"Some of them were terribly poorly experienced in management, had no commercial acumen, and were making decisions based on a one option approach, which was the knee-jerk reaction to do something without actually thinking the problem through, looking at the various options, and identifying which is the best one." [42]*

His narrative provides his statement of his perceptions of other Trustees abilities, but offering no supporting information. His judgement that he could make things better is based around his prior experience. He proposes a way ahead which he implies is the better way to make decisions. In his narrative he criticises others, alleging egos, and says he is different, not looking to control things because:

> *"I'm not bothered about that. I've been in a senior role in my work life, and frankly, I'm not bothered about the feeling of having control over anything. I have no agenda other than wanting the best for Country Railway." [42]*

For his audience he presents himself as an experienced person having no other agenda, ego or aspirations to control, wanting the best for Country Railway, perhaps as long as the 'best' is the one he proposes.

8.4.2. Invited/approached by another person

In this subsection the actions of another in inviting a participant to take on additional positions will be examined.

Participant [27], whom we have already met above, undertook to learn new skills successfully did so and, at his retirement, the remaining more than 80-year-old Carriage Trimmer told him:

> *"I've already told the manager here that you're perfectly capable of carrying on and running the trimming here, so over to you, basically" [27]*

The retiring carriage trimmer here acts as the agent for the paid manager who, from the narrative, agreed with the trimmer's advice and was supportive of [27] becoming the leader of the team. [27] continued with his carriage trimming work and as the team leader recounted:

> *"So, I'm starting to think, it's like being back at work; I'm managing a team." [27]*

His narrative tells of him as a successful team leader and he reflects:

> *"I kept going at it and I started working on my own, then some new people came along who were interested and I started training them. And it's grown to the extent now that we have in total, including myself on the books of ten people, all of whom I've trained, which is a great part of the job, I think. And, effectively, I'm their team leader, if you like, or their manager. I manage the team.... it's taken 15 years to get to this point, but we have probably got now, arguably, I would suggest we've got the biggest heritage railway carriage trimming team probably of any heritage railway in the country, in terms of numbers". [27]*

Having arrived into the position by the action of another [27] used skills and elements of his previous work identity to train new volunteers joining the team, which he identifies as important ("a great part of the job") and thus to build a successful team.

Within the analytical framework it was appropriate to put [27] into this category as it was another who created the opportunity for him. His subsequent actions over the years have elements of those in the 'pursued opportunities' category as he chose to create a bigger and successful team of volunteers, identifying as the leader of what he recounts as the 'best'. He reflects

> *"If I drop dead tomorrow, they would survive, no doubt about that, because I've trained them up and they're all enthusiasts and they wouldn't just walk away. But that's not the point; the point is that we work well as a team and it seems that they can tolerate my management style, because I don't get any complaints and I seem to attract new people and seem to manage to hold onto the ones I've got. And in a volunteer-led organisation, the first sign that things aren't going very well and they don't like your style is, of course, people walk." [27]*

As a manager of volunteers his narrative suggests he has re-constructed his identity such that he has recreated the original circumstance that led to him becoming the leader of the team through creating the prospect of continuity for the carriage trimming team. As a volunteer who has built a successful team over a long period, his account seems to underplay his management ability ("can tolerate" [me]) and he identifies with the need in a volunteer-led organisation to actively encourage volunteer retention.

Whilst successfully building the carriage trimming team [27] recalls he was also showing interest in the broader aspects of Country Railway by:

> *"..... showing a modicum of interest in other aspects of the way your organisation is run and you start asking slightly intelligent questions about things and querying things, one or two people think, this guy's processing stuff; he might be useful for the management of the railway." [27]*

This led to a senior member of the volunteer management team approaching him to ask:

> *"As the society was instituting a governance review, would I be interested in being part of the review team? So, I thought about it and thought, well, that sounds quite interesting. I was involved in management in the big world outside before I retired. So, in a weak moment, I said, "Yes, okay". And that process turned out to be a huge task because, as you'd imagine, it covered a huge amount." [27]*

The narrative does not say how or to whom he was showing 'interest' in the way the organisation was run, but his narrative recounts it attracted attention. In asking questions the identity work he was undertaking was that of someone interested in the broader picture - he describes his questions as 'slightly intelligent' and seems to be setting himself up as an informed questioner, but not overplaying his competence to his audience. He narrates that when approached about the senior governance review position he recounts linking identities created for Country Railway with his prior working life, contrasting the 'big' world from which he retired with the smaller world of the heritage railway. Perhaps the implication is that if he has done 'big', then doing small will be relatively easy. Not wanting to present himself as overenthusiastic for the position he attributes his acceptance of it to 'a weak moment'. His narrative continues with him accepting other overtures to become a member of another major project and ultimately a Trustee.

This volunteer, apparently not having started out seeking a management position, ends up with a range of positions of increasing seniority. As some of them were project-based, some projects may have concluded or the level of activity required diminished –

he does not say. The narrative suggests that having got into the position of managing a team, his decisions to take on multiple positions were considered choices as identity re-construction continued. Reflecting on all his positions he holds his identity work marks out his craft skills as ultimately the most salient final choice:

> *"The last thing I'd give up is the trimming." [27]*

When working as a member of a group run by a Trustee the approach might come directly from that Trustee. Participant [35] is a member of the "metal bashing gang" and has been for a long time. He recounts how he also became a Trustee:

> *"Our leader in the early days was on the original committee when it started. In later years, he suggested that some of us had been around long enough that we knew enough about the railway that perhaps we ought to get involved in trying to make certain things kept on the straight and narrow because it was tending to diverge a bit, more than a bit. Several of us were tempted to put heads above the parapet, and I was caught about ten years ago, maybe 12 years ago, to stand as a trustee of the society. The idea was to sit on a seat so nobody else could, which I did for several of the first years." [35]*

The narrative tells of a team leader with concerns that some aspects of the railway were diverging from his perception of the 'straight and narrow' – on which [35] did not elaborate. He encouraged his team members to stand for Trustee positions as a tactical move. Team members appear to have shared at least elements of his perspective, with [35] narrating that he was "caught" to take up a Trustee position, implying he had no choice. He says there were disagreements amongst Trustees about the future direction of the railway:

"The reason I took it on was the fact that when this society was started along the railway, the whole point of it was to preserve the railway as it was. Try and maintain the ambience of the railway once we took it on because it was very, very run down, but to try and get it back to some resemblance of a neat and tidy branch line." [35]

This may explain the former team leader's conception of the 'straight and narrow' although Participant [35] does not confirm this. The narrator identifies with the notion of preservation as the prime purpose of Country Railway, asserting ("the fact") this was the intention of all members. As a Trustee he holds this as his prime purpose and, elsewhere in his interview is critical of those who would do otherwise and develop aspects of the railway with a tourism focus. In general, disagreements between Trustees are not uncommon and here [35] acknowledges this but identifies as someone seeking to have his perspective predominant in the organisation.

Participant [32], who we have also already met, is a volunteer and also a paid supervisor with long experience on Country Railway. Her volunteering embraces using her craft skills and supervising other volunteers at weekends. She is also a Trustee which in her narrative is little mentioned. When in the interview I asked why she is a Trustee the response was:

"I was asked" [32].

She says no more about the position itself and later in the interview reflects on the Trustee position:

> *"My husband advised me against it, he said "Don't do it". Usually I take his advice....but I didn't in this case. I find it a struggle sometimes. It's annoying because I'm a doing person." [32]*

Participant [32] in her narration tells little about this additional position, not saying by whom or how she was asked nor why she accepted the overture. She attributes her decision to her own agency whilst suggesting she usually follows the advice of another. Her identity re-construction is that of an individual who finds herself in a place she is not comfortable ("I find it a struggle") and in which she recognises she has other skills she can better use ("a doing person"). Sometimes overtures made to volunteers are perhaps not always well-considered. If the new position is not going well the individual engages in identity work needed to repair damage to their identity.

The workshop participants narrated different approaches to undertaking multiple positions. Two participants stood (at different times) for election against incumbent Trustees. They were prepared to take such action as they both identified themselves as better qualified or experienced candidates than the incumbents. Two of those who were invited to undertake further positions received overtures from within their own teams. Both relate identities in which they had the relevant craft skills and prior experience, and both in their narratives present themselves as not being *too* keen to take on the new positions (a "weak moment" and "caught to stand"). One participant was approached to stand as a Trustee and accepted, but concludes that she is not well positioned for the position and says very little about her activity. She engages in identity work around her other abilities and skills to repair a damaged identity.

8.5 Conclusions

This chapter has explored the management-related activities of those participants located in the workshops. The starting point to their volunteering varied, some coming at a young age with enthusiasm to 'play with trains' or with some youthful understanding of railways, which engaged them in identity work over a period of time in which their identities as railway volunteers expanded and grew as they discovered the range of activities available to them in the workshop environment. Others came to their volunteering later in life and added volunteering to other life activities in their identity. In making the decision to become involved as a volunteer, some used their own agency, others came as a result of the actions of another which provided the impetus.

The move into a first management position required acceptance the need for the re-construction of identity in order to develop it from craftsperson in a workshop to something broader. The departure of a previous team leader sometime initiated action toward a management position. An unusual situation found in the "metal bashing gang" where the departure of the incumbent leader led to a situation where the participants narrated they considered they and all the team members felt competent to self-manage the workshop.

There are, as noted elsewhere, a disproportionate number of Trustees (five out of the seven participants) in this group. A finding from the participants is the confidence they narrate in their own identities that led three of them (independently and temporally spaced) to stand for Trustee positions against incumbents. The narratives of the workshop participants, with one exception, recount self-confidence in abilities beyond that which drew them to volunteer in craft positions in the first place.

The next chapter will draw together the threads from these results and discuss some of the issues for those volunteers navigating the experience of becoming managers in a safety-critical environment.

8.6 Implications for the research questions

This section looking at the Workshops will follow the same format as the two previous Results chapters in considering the implications of the results for the research questions.

8.6.1 In what ways are routes into volunteering navigated?

My analysis found participants in the workshops narrated several differing routes into their volunteering. In a similar way to that found in Section 6.6.1, joining at a young age was one route, however, few had a clear idea of what they wanted to do other than to volunteer at the railway. Young volunteers engaged in activities, such as railway coach restoration, work on buildings and railway track that in present circumstances is not allowed for under-16's. The analysis found that those less clear on what they wanted to do when they joined tried several different activities before settling in a particular workshop position. Also, as noted in the steam locomotive footplate section this route to starting volunteering at a young age is no longer possible. One participant did have a clear view of the activity he wished to pursue as it involved a porous boundary between work and volunteering.

Others narrated planning their routes into volunteering where they delayed their volunteering until (usually) retirement. Occasionally, there were those who had an unplanned route, knew little about the organisation and with an approach towards using skills they already possessed, volunteered for positions where they were able to offer these skills to the railway, and maybe develop new skills.

8.6.2. What are volunteers experiences of becoming managers?

My analysis highlights that for workshop participants there is nothing similar to the competency-based pathway seen in the preceding two chapters. (My analysis of what I describe as the pathways to management positions is explained further in Table 9.1). Experiences of the pathways to becoming a manager were narrated around the actual work activity, carriage restoration for example, in which the volunteer was engaged, and to the opportunistic emergence of management positions. When other volunteers retire or move on, or when a new project emerges, those volunteers perceived by influential others' to have relevant skills then may be offered the opportunity to take up a management position. It was not always clear which criteria might have led to the offer of the opportunity. The analysis highlighted a contrast to the opportunistic approach, in that volunteers in the workshop group occasionally narrated taking an agentic approach and creating a management position themselves. Even more unusually participants in one work group narrated their experiences when the group decided against having a manager at all. Collectively, they decided to become a self-managing 'commune', with this creating new boundaries necessitating considerable identity work by the group. This involved presenting the 'commune' to other volunteer groups and the senior management as a suitable way of working in a safety-critical environment.

8.6.3 How do volunteers engage with multiple position holding?

Those participant volunteers holding multiple positions engaged with them in different ways. My analysis found a number of pathways including invitations were made by un-named others' to undertake additional positions, and that similarly as observed in Sections 6.6.3 and 7.6.3, this form of engagement did not always lead to a successful outcome. Specifically undertaking a Trustee position, with which the participant was unfamiliar and with no training made any success difficult. From my analysis a paradox emerged, whilst some lacked success in taking a Trustee position, there were other narrations recounting agency in standing for election as a Trustee and seeking to evict an incumbent Trustee from their positions. Driven by accounts of their experiences as a volunteer and their opinions of organisational direction they mobilised these as the basis for their potential engagement in steering and directing the organisation as a Trustee.

CHAPTER 9 DISCUSSION AND CONCLUSIONS

9.*5* Limitations and further research

9.5.1 Limitations

9.5.2 Recommendations for further research

9.6 Personal reflection

9.7 Final conclusions

9.1 Introduction

My thesis expands understanding of how volunteers come to occupy managerial positions within a volunteer-led organisation, with my analysis demonstrating situations that are rich, diverse, and complex. By applying to volunteering an identity lens I address the research questions: "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?

1. In what ways are routes to volunteering navigated?
2. What are volunteers experiences of becoming a manager*?*
3. How do volunteers engage with multiple position holding?

This thesis offers new and important insights into theories of volunteering addressing this under-researched area at the interface of the concepts of volunteering and identity. The thesis challenges existing theories of the navigation of routes into volunteering (Clary et al, 1998; Dury, et al., 2015; Aydinli, et al., 2016) adding important missing nuance to theories developed mainly through typologies (see further discussion in Section 9.3.1.1). It also adds significant insights into theories of volunteer management, challenging the assumptions underpinning volunteer management by paid employees (Hagar and Brudney, 2015; Einarsdottir and Osia, 2020) (see further discussion in Section 9.3.1.2). Utilising an identity lens, it focuses on the little explored identity work of volunteers at boundaries and transitions adding new insights (Taylor, 2004; Beech, 2011; Kang, et al., 2011; (see further discussion in Section 9.3.2.1, 9.3.3.2). The holding of multiple positions has been explored in the paid work environment (Steimel, 2018; Currie and Logan, 2020; Campion, et al., 2020) (see Section 9.3.2.2). It contributes to existing theories of dangerous and perilous volunteering (Lois, 1999; Baxter-Tomkins, 2011; O'Toole, 2013; Collie and Greene,

2023) introducing the concept of risky volunteering in a safety-critical environment highlighting the notion of controllable risk. (See further discussion in Section 9.3.2.4).

Approaching my research from an ethnographic perspective, and as an insider participant observer enabled the narratives of participants to be examined closely. Heritage steam railways are complex, safety-critical organisations and the narratives cover both front-line and behind-the-scenes activities.

This chapter starts with a critical examination of the findings in relation the research questions. The discussion draws on these interpretations to identify key contributions to knowledge and their implications. The first and second contributions are empirical and add to existing understandings of the navigation of routes into volunteering, providing insight and nuance missed by typologies (Clary, et al., 1998; Stukas, et al., 2017). Volunteers navigating their routes into the organisation have complex issues related to temporal matters and to perceived opportunities for participation. The second empirical contribution adds important and challenging new insights into volunteer's experience of becoming a volunteer manager, offering Explication of previously unexplored pathways into management. Subsequently, my research challenges assumptions that approaches to managing volunteers suitable for use by paid managers can be transferred to unpaid volunteer managers (see Section 9.4.3).

Adding new theoretical insight, the third contribution adds to theories of the identity work of volunteers at the boundaries they experience as unpaid volunteer managers.

In the fourth contribution I extend theoretical understandings of dangerous and perilous volunteering with my new concept of risky volunteering, which is examined further in Section 9.3.2.4.

The next section will interpret the findings, and will be followed by a discussion of the contributions to knowledge and their implications. This will be followed by consideration of implications for practice and limitations to this research and proposals for future research, and personal reflections on undertaking this research and finally overall conclusions.

9.2 Interpreting the findings

This section interprets the findings of the overall research question: "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?, and examines each of the sub-questions in turn:

1. In what ways are routes to volunteering navigated?
2. What are volunteers experiences of becoming a manager?
3. How do volunteers engage with multiple position holding?

This section brings together the findings and offers a summary of how existing knowledge is challenged and extending knowledge of how in the context of a safety-critical environment volunteers navigate the experience of becoming managers.

The research questions are considered in the context of the main bodies of literature relating to volunteering and identity.

9.2.1 In what ways are routes to volunteering navigated?

My thesis explores how those volunteers who became managers first identified with the specific organisation, or the sector more generally. The academic literature reviewed in Chapter 2 and summarised in Table 2.4 identifies a variety of reasons why an individual may volunteer with an organisation (Clary, et al., 1998; Farmer and Fedor, 1999; Principi, et al., 2012; Dury, et al., 2015; Aydinli, et al., 2016; Harp, et al., 2017). My study offers further insight into volunteer joining, remaining, and later taking on more responsible positions in the organisation. The literature on becoming a volunteer often assumes this is a response to appeals made by the organisation (Holmes and Slater, 2012; Alam, et al., 2020; Smith, et al., 2020). However, for some volunteers prior knowledge and familiarity with the organisation is a precursor to their own volunteering (O'Toole, 2013) - this is less often found in volunteer literature. My research finds additional narrations for joining an organisation not previously considered in the literature. Narratives within my research suggest whilst there are volunteers fitting such prior categorisations, there are others for whom the organisations activity is something they have a strong interest in, or even a passion for, that leads them to join the organisation. The narratives show a variety of approaches are adopted by volunteers, some of whom through their passion join the organisation as young as they can, others hold a lifelong deep interest in the organisation but subsume it to work and family until the time is right for them to become an active volunteer.

My research found nuance in the reasons why volunteers join an organisation and there was an overall consistency in their desire to be a member of the specific organisation. The membership of the organisation does not necessarily lead to consistent behaviour by volunteers as shown by the differing approaches to position holding seen at Stations A and B, this is discussed further in Section 9.3.2.1.

9.2.2 What are volunteers experiences of becoming a manager?

As reviewed in Chapter 2 there have long been calls in the literature for more research about those volunteers who engage in activities that involve the management of other volunteers (Hill and Stevens, 2012; Einholf, 2018; De Clercke, 2021). However, this remains an under-researched area especially in smaller voluntary organisations (Milbourne, 2013) and therefore I detail here how my research contributes to this area, adding understanding to the pathways to a management position.

My research adds understanding to how complex the experience of coming to be in a management position in a voluntary organisation may be for a volunteer. I deliberately use the words 'coming to be' as opposed for example 'selected for' which might be commonly found in the paid work environment. My research found paths to management only one of which included formal selection, and Table 9.1 below provides insights to the pathways and examples of the positions attained via the pathways.

Table 9. 1 – Pathways to responsibilities for the management of others

Becoming a manager by	**Pathway**	**Example positions**
Mandated formality	Assessed competence through job-specific mandatory training processes. Becoming a manager is part of progression in the position	Locomotive Driver Leading Porter
Choice and selection	The individual chooses to apply for a new position. Selection process to confirm ability to develop additional competence to undertake the position and competence to assess the competence of others – including those in "mandated formality" positions.	Locomotive Inspector Station Master (Station A) Station Foreman (Station A)
Informality	Doing a non-managerial job. Has existing management skills from prior experience elsewhere. Opportunity arises through, e.g. retirement, resignation or a new position arises to meet new needs.	Workshop Team Leader Project Manager
Invitation	Based on the perceptions of others	Trustee [Does require formal approval at AGM]
Quasi-independence	Individual chooses to self-nominate	A Workshop run as a 'commune'. "We do it differently here" ***Specific to Trustees*:** "I think I can do it better (than the incumbent). To block others hoping to get a position. To change things to own preferences.

The pathways I have labelled **'**Mandated Formality' and 'Choice and Selection' appear to sit comfortably within the safety-critical management process. That of 'Invitation' is based on the observations of, and discussions about, an individual by more senior members of the management team. The 'Quasi-independence' approach could potentially fall outside formal safety-critical processes but my analysis of participant narratives suggested the individuals had an awareness of safety-critical issues broadly, and were able to engage in relevant identity work at the boundary of the organisation's formal structures and their quasi-independence. The tensions found around safety-criticality are discussed in Section 9.3.2.2. This self-determined semi-autonomous approach was narrated as ultimately receiving the approval of the organisation – either by overt acceptance or by tacit acceptance. A limitation to be noted is that the 'Quasi-independence' pathway with its outcomes can be associated only with the specific organisation in this research.

9.2.3 How do volunteers engage with multiple position holding?

The holding of multiple volunteer positions is little explored in the literature. Scholars have looked at identity in hybrid positions in paid work where, for example, a doctor may also be a manager of a medical function (Bresnen, et al., 2019; Currie and Logan, 2020; McGivern, et al., 2015). Research has also considered volunteers who additionally hold multiple jobs in the paid work environment exploring it as a factor in their propensity to quit their volunteering activity (Stefanick, et al., 2020). However, of particular significance in my research was encountering volunteers who hold multiple positions within this same voluntary organisation (Table 2.4.) Examples include a volunteer locomotive Driver who is also a Trustee (see sections 6.4 and 6.6.4); indeed, in my research most Trustees were also active volunteers elsewhere in the organisation. There are also volunteers who hold two, or sometimes more, positions undertaking quite different operational activities. A Station Foreman who is also a Signaller (see sections 7.4 and 7.6.4), or another who is engaged in platform work and carriage maintenance (see sections 8.4 and 8.6.4). All participants holding multiple positions narrated identity work around boundaries, and in a number of instances this involved boundaries in positions unrelated to their main volunteering role (Taylor, 2004; McAllum, 2018; Steilmel, 2018) which entailed work to manage and where necessary re-construct their identities (Sveningsson and Alvesson, 2018; Brown, 2020; Hoyer, 2020). This identity work is complex and reflects issues associated with the fluidity of inhabiting multiple identities (Caza, et al., 2018; Brown, 2017). Occasionally it appeared participants found it impossible to re-construct an identity to facilitate multiple volunteer position holding in addition to other family and work identities, with a decision then being made to discontinue some volunteering activity. My research thus highlights how overload and associated tensions are a risk to volunteers (Allen and Mueller, 2013; Moreno-Jimenez, et al., (2010) as well as in the paid workplace. The contributions to boundaries and boundary work are discussed further in section 9.3.2.1.

This section has explored findings from my research addressing ways routes into volunteering are navigated to become a volunteer in a safety-critical environment, experiences of becoming a manager of other volunteers in that environment and engagement with multiple positions by those volunteers already with management responsibilities. The next section builds upon the foundations of the findings and propose contributions to knowledge and their implications.

9.3 Contributions to knowledge and their implications

I now move to key contributions to knowledge and their implications. In the previous section I interpreted the findings associated with the research sub-questions: In what ways are routes into volunteering navigated? What are volunteers experiences of becoming a manager? How do volunteers engage with multiple position holding? This section brings those interpretations together and considers them from the overall context of the research questions. I propose two empirical contributions: that volunteer navigation into volunteer using organisations is complex, and progress to a management position is not necessarily linear nor career-driven.

In both these contributions I extend our understanding of how volunteers narrate their experience which I argue differs from that of paid employees joining and working in an organisation. Firstly, the volunteers in this study narrated wider and more complex approaches in their reasons for joining the organisation, implying a more nuanced approach might be given to processes which have more reliance upon the production of motive-driven categorisations and typologies (Clary, et al., 1998; Aydinli, et al, 2016). Secondly, whilst there are some similarities to the paid work environment (Alfes, et al., 2017; Traeger and Alfes, 2019; Prince and Piatik, 2023), a far more complex situation is narrated in a volunteer environment; an area previously under-researched.

I offer theoretical contributions adding insights to the identity work of volunteers at boundaries and transitions (Taylor, 2004; Orlikowski, 2007; Beech, 2011; Kang, et al., 2011; Valand and Georg, 2018), identity regulation (Bardon, et al., 2017) and identity protection (Petriglieri (2011). My contribution adds nuance from my analysis of narrations of boundary crossing in the voluntary sector (MacClean and Webber, 2015), to the holding of multiple roles and the protection of the identities *held* relating to those roles (Ashcroft, et al., 2008; Brown, 2020; Pratt,2020).

I propose the new concept of risky volunteering to extend theories of dangerous and perilous volunteering (Britton, 1991, Lois, 1999, Baxter-Tomkins, 2011, O'Toole, 2013, Collie and Greene, 2023).

9.3.1 Empirical contribution

This section examines my findings from the research and considers how they relate to empirical research in the context of the research questions. It will contribute to the understanding issues of navigating routes into volunteering (Cable and Kay, 2012; Cantillon and Baker, 2020), and volunteers engaging in a new management position. Whilst it addresses issues of identity as a volunteer experiences a new responsibility for the management of others, the narratives of participants showed complexity in the construction of identity as a volunteer. Indeed, the construction of a volunteer identity itself entails the reconstruction of prior identity into a new salient identity (Ashforth and Johnson, 2001; Beech, et al., 2016; Watson, 2020; Wittman,2019).

There is little research into volunteering in safety-critical environments such as heritage railways, although research has addressed situations where human life is at risk such as perilous volunteering at sea (O'Toole; 2013; O'Toole and Calvard, 2020) and firefighting (Baxter-Tomkins, 2011), and this is discussed further in Section 9.3.2.4.

9.3.1.1 Complex volunteer narratives – *navigating routes into volunteering*

Participants narrated different routes into volunteering with the organisation, although none of the participants narrated going through a selection process prior to commencing their volunteering. Narratives related by participants suggested that individual reasons for joining the organisation are more complex than previously understood. Previous research utilising typologies has focused on broadly socially related issues such as altruism, the value of volunteering itself, commitment to volunteering and cultural pressure (Cnaan et al., 1996; Clary et al., 1996; Spear, et al., 2009; Hill and Stevens, 2011; Ho and O'Donoghue, 2014; Keleman, et al., 2017).

In contrast my findings imply a more nuanced approach beyond typologies to how organisational entry can occur. Narrations included those around a particular strongly-held passion of the participant for which involvement as a volunteer had started early in life or had been held back for other priorities in life, or randomly discovering the organisation whilst out for a walk (Sections 6.2, 6.6, 7.2, 7.6, 8.2, 8.6). My research adds some *new* perspectives to the work of O'Toole (2013) which has some strong examples of prior family involvement in volunteering activity with the Royal National Lifeboat Institution. In my research family influence was narrated by participants who had a family history of work in the railway industry whilst other narrations indicated additional mechanisms of family influence through family member encouragement, funding, gifting and direction to the individual to help navigate the route into volunteering.

Going beyond a typological approach further nuance is added through those narratives of passion for all things related to steam locomotion as the focus for volunteering with the organisation. Other participants narrated that although they had a general interest in heritage railways they had not previously considered volunteering at all, and were encouraged by family members to get actively involved as a volunteer. Whilst questionnaire-based research identifies often broadly societal reasons to engage in volunteering (Clary, et al., 1998; Aydinli, et al., 2016), the narrations in my research suggested more individual reasoning. For example, Participant [37] who through a chance lunchtime conversation with a colleague was introduced to the railway, becoming an active volunteer and later a Trustee. I propose that understanding better the more nuanced approaches narrated by volunteers to their routes into the organisation has some influence on their narrations and identity reconstruction when experiencing a new position as a manager. For example, some of those joining with a passion for steam locomotion narrated a more tightly focused approach towards maintaining the concept of heritage rather than to the commercial considerations of the organisation, whilst others narrated more focus on concerns for ensuring the financial viability of the organisation. Participants who joined later in life, maybe after working in a different environment often narrated a broader and more understanding approach to the tensions between sustaining heritage *per se* and the commercial and financial needs of the organisation to earn income and obtain funding to sustain its heritage activities. Commercially-oriented activities, such as running 'Santa Special' trains at Christmas or 'Diesel Galas' with locomotives specially brought in from other heritage railways to attract a different set of customers, and more income, were narrated as appropriate for the organisation to undertake. The differing starting points for an individuals' volunteering activity might impact on subsequent identity work experienced when taking up management responsibilities. Further research in this area could add insight to the possible tensions and conflicts that arise.

9.3.1.2 Experiences of becoming a manager are not necessarily linear nor career-driven

My research has examined the many different participant narratives describing the variety of pathways they experienced when becoming responsible for the management of others (Sections 6.3, 6.6, 7.3, 7.6, 8.3, 8.6). There is a wide literature about managing and management processes (Mintzberg, 1989, 2009) as well as managing the human resource (Beardwell and Thompson, 2017; Torrington, et al., 2020). It is argued that people in the paid work environment pursue careers (Bozionelos and Baruch (2015) and the management of career is an activity requiring approaches which may be complex and follow a linear direction. In the literature careers, mostly in paid employment, are considered in many contexts, for example in sport (Coupland, 2015), taxi driving (Cooper, 2020) and more broadly (Schein, 1978; Mayo, 1991; Bagdadli and Gianecchini, 2019). There are personal reminiscences of careers (Saville, 2020; Shooter, 2020) and individual case studies which appear for example supporting material in 'how to' books about personal career development (Bloch and Bates, 1995). How individuals first became managers and narrate their pathways to becoming a manger is less clear. Prior research in the voluntary sector around those in management positions also largely relates to paid managers (Holmes, 2004; Brudney, 2009; Waikayi, et al., 2012; Studer, 2016; Einarsdottir and Osia, 2020), and not to unpaid volunteers.

My research contributes new insights to understanding the variety and complexity of how individual unpaid volunteers narrated their experiences of becoming managers in the specific research context as I show in my Table 9.1 above showing pathways to management arising from my analysis. Within the narrations, on occasion similarities to the paid work environment were found where a position is advertised internally and applications for the position invited. A more formal selection process with an interview was then followed. Other narrations exhibited different pathways. That I label as "mandated formality" does perhaps have linear similarities for example to airline or ships Captains who progress through grades to the ultimate position of the person responsible for the activities of an entire crew (British Airways, 2023). The volunteers who became footplate crew and achieved the desired position of locomotive Driver, by default became the manager of the crew and responsible for the safe operation of the train. Participants were sometimes candid about their perceptions of themselves as managers of people, however the passion for the steam locomotive itself and their competence to drive it was held strong in their identity.

Another route to management narrated, I describe as "informality" in which being in a particular place at a particular time led to management responsibilities evolving. A volunteer working on restoring a carriage could become the project manager for a larger project simply because of their presence when the need arose, and of course their acceptance. The pathway 'invitation' resulted in a volunteer being invited to undertake a new position – a number of participants were invited to become Trustees, based on the (undisclosed) perceptions of others about their capability for that position. Occasionally, this pathway was narrated as difficult for the individual, requiring much identity work at boundaries, and once in a while having unhappy outcomes, resolved for the safety and protection of the individual's identity by resignation. Another route into management narrated was of a volunteer, or group of volunteers, taking an initiative to set up a new activity, or to influence the way an activity was managed. In their identity work the volunteers were managing a sensitive line between autonomy and operating in a regulated safety-critical environment.

These narrations about engaging in new responsibilities for managing others were experienced within one volunteer-led organisation. Perhaps a key here is that the organisation is structured as volunteer-led, with the volunteers receiving no financial reward for their activities, thus eliminating the work-cash nexus, and with identities be*ing* created and managed in ways that do not arise in the paid work environment. This is a rich area for further research to add further insights to the management of voluntary organisations.

This section has considered the key empirical contributions from my research, the next will from a theoretical perspective, contribute to issues of boundaries and tensions *arising* from holding multiple positions, transitions in volunteering and managing, and risky volunteering in a safety-critical environment.

9.3.2 Theoretical contribution

This section will consider theoretical perspectives through an identity lens of boundaries experienced with engagement in management activities (Section 9.3.2.1), the tensions from engaging in multiple position holding (Section 9.3.2.2), and transitions in volunteering (Section 9.3.2.3). These were issues that arose in participants narrations with implications for identity re-construction, providing new insights to add to those more usually reported. Identities narrated on joining the organisation may be re-constructed in differing ways as volunteers come to undertake identity work in boundary management when engaging in management positions. When engaging in multiple positions further boundary crossing (Tushman and Scanlon, 1981; McLean and Webber, 2015; Needham, et al., 2017; Ellis and Hopkinson, 2020) is experienced along with issues of the protection of identity (Fraher and Gabriel, 2014). The volunteer context differs from that of the paid employment context and I add insights drawn from the volunteer context. In this section I make an important contribution to theories of dangerous and perilous volunteering (Section 9.3.2.4).

9.3.2.1 Tensions at boundaries

From the perspective of theorising at boundaries (McClean and Webber, 2015; Ellis and Hopkinson, 2020) my research adds insight to the identity work of volunteers at boundaries, boundary transitions (see Table 3.10). Participants narrated identity boundaries between their volunteering and the other parts of their life, reflecting that their identities are constructed from many different individual life experiences - occupation, family, religion etc (Caza, et al., 2018; Brown 2020). Within literature, identity perspectives of boundaries are portrayed as associated with career (La Point, 2010; Coupland, 2015(a); Ibarra and Obardaru, 2016; Brown, 2020), inter-organisational *activity* (Beech, 2011; Ellis and Hopkinson, 2020), liminal (Hoyes, 2010; Winkler, 2019; Ibarra and Obodaru, 2020), and with potential conflict between volunteerism and professionalism (Kreutzer and Jager, 2011; McAllum, 2018) (section 3.11). My thesis adds insight to theorising about boundaries with the focus on volunteers rather than those in the paid work environment as explained further below. The narratives of volunteer participants provided insights and complexity to ways to perform, and protect, different identities temporally. Whilst, for example, a volunteer may be undertaking identity work at the boundary between a senior volunteer management position as a Trustee and that of a locomotive Driver, that individual may additionally be simultaneously on the boundary between being a locomotive Driver and a Guard, all within the same organisation, requiring the construction and protection of those differing identities. Such identity work is complex as it involves issues of seniority (Sveningsson and Alvesson, 2003) and multiple job holding (Ashforth and Johnson, 2001) within the same voluntary organisation with the volunteer having to manage identity work in the one environment, rather than holding multiple positions in different organisations (Campion, et al., 2020).

As my analysis of the research demonstrates from participant narratives, such complex identity work may prove too challenging and result in the volunteer exiting from particular managerial positions within the organisation – requiring still more identity work for the protection of their identity within the organisation (Petriglieri, 2011; Bataille and Vough, 2022). Individuals may struggle with their identity work in such situations as they face the challenge to maintain consistency in a changing identity within the organisation (Sveningsson and Alvesson, 2003; Winkler, 2020). Participants on occasion seemed to find themselves in positions of paradox (Brown, 2015; Sheep, et al., 2017). For example, Participant [8] narrated he felt obliged to take additional positions, which worked against the amount of time he had available for other positions and activities, thus creating an identity in a state of flux (*Section 6.4.2)*. Identity work not resolved may lead to physical or emotional withdrawal from a situation as, for example Participant [31] who chose not to talk about a particular position held (Section 8.4.2).

Boundaries may be theorised as inter-organisational or intra-organisational (Beech, 2011; Ellis and Hopkinson, 2020) or between differing status levels (Sveningsson and Alvesson, 2003) within an organisation, my research contributes to theories of identity work at boundaries (Kriener, et al., 2006) by suggesting that these boundaries are not simply binary but are multi-dimensional. In my research participants undertook identity work at significantly differing boundaries within the organisation requiring complex identity work particularly to protect identity – for example as a Trustee and Driver (see Section 6.4), Participant narrations included crossing organisational boundaries at retirement, which in practice occurred either at retirement age or for some participants prior to retirement as they negotiated their individual boundary crossings (Ibarra and Obardaru, 2016). The transition involved in crossing boundaries during retirement had different narrations, for some it was a carefully planned experience, for others less so. Those for whom it was less well-planned had not only to start volunteering in a new organisation, but also in new positions and activities with which they had previously not been involved. Participants [2] and [27] came from non-railway employments with little understanding of the sorts of positions they might be undertaking. Their identity work required flexibility to deal with the transitions (Sheep, et al, 2017; Soderlund and Borg, 2018; Sullivan and Al Ariss, 2019). Moreover, my research finds that these boundaries are not solely interactional. I therefore also contribute to understandings of material boundaries (Dale, 2005; Orlikowski, 2007; Symon and Pritchard, 2015; Valand and Georg, 2018) and their role in identity work. By extending ideas about the forms of material boundaries my research draws attention to facets such as uniform dress and physical distance providing narrative hooks for identity work. The use of uniform dress by participants on the platform, and in other public-facing areas, addresses boundaries for organisational identity (the passengers recognise a "railway person"), individual identity (showing status among platform peers), and more broadly to other railway volunteers (this is who I am). Whilst boundaries take various forms in identity work (Ellis and Hopkinson, 2020, Needham et al., 2017) and identity work at boundaries is complex (Orlikowski, 2007), insights from the analysis of narratives of participants in my study contribute to further understanding of the complexity of boundaries as noted above with the example of platform volunteers. A particular workplace was narrated as 'magical' imparting a special attribute within the material boundary. Others saw the same workplace as dirty and requiring hard physical work, suggesting a location can be constructed differently by individuals during their identity work.

Boundaries often may be permeable or occasionally impermeable (MacLean and Webber, (Taylor, 2004); (Caza, et al., 2018); (Korschun 2015; Wittman 2019). (Section 3.11). My research contributes to theory by its finding that at one boundary between locations (Station A and Station B) it appeared from narrations to be impermeable as participants narrated their decision *to* undertake little boundary work and remained content for the boundary to remain unexplored. The*se* narrations permitted participants to deny an understanding of how other volunteers undertook a similar position in a different location. As noted elsewhere in this thesis (9.3.1.2) participants narrated a careful balance between the unexplored boundary and the overarching requirement to remain within the regulatory framework of the organisation. This exploration of boundaries in the context of the voluntary organisation contributes new understandings of how individuals negotiate boundaries during their identity work.

9.3.2.2 Tensions associated with the holding of multiple positions

My research suggests that an identity tension within participant volunteer narratives is not so much a question of "Who am I?" but "Who am I today?" as on any one day they may be performing a quite different role to the previous day. Participants with multiple positions experienced pressures (Bresnen, et al., 2019) from the different demands made upon them, for example holding a position as a locomotive Driver, responsible for the crew, and being a Trustee with responsibilities for the whole organisation.

The holding of multiple positions has been explored and theorised in the paid work environment (Marks, 1997; Shelley, et al., 2018; Campion, et al., 2020). Even with the identity work, mentioned above, multiple boundaries may be crossed in the course of volunteering. In some contexts it may be possible to indicate the boundary of the position the volunteer is filling on a particular day by material identity (Pratt and Rafaeli, 1997; Gioia, et al., 2000; Orlikowski, 2007, 2010; Baxter-Tompkins, 2011; Kang, et al., 2011; Shefer, et al., 2018) as for example the platform staff wear uniform hats that depict their status and activity (see Chapter 4). Steam locomotive crew work in a hot and dirty environment, the Driver is invariably the cleanest and smartest dressed on the footplate.

Narratives provided by participants in this study include those of tensions that can arise when multiple position holders are challenged by, or take issue with, management decisions made by others that have impact upon the boundaries of the multiple positions held. Such tensions have been theorised in paid work contexts, for example the tensions arising from being 'in-between' other organisational layers such as front-line staff and middle managers (Clarke et al., 2009, Down and Reveley, 2009).

The tensions between volunteers and paid managers has been the subject of research (Nordberg, 2019; Einarsdottir and Osia, 2020). However, the context of tensions between unpaid volunteer managers is rather different, as some management processes and practices utilised for the resolution of tensions in the paid work environment may be inapplicable. Therefore, my study contributes further theoretical insights into how volunteer managers negotiate organisational practices and differing boundary conditions (Wittman, 2019). In so doing their identity work may create impervious boundaries or quasi-autonomous functions and positions without formal organisational support (see further 3.11, 8.4, 9.1).

As I have shown through my analysis that whilst narrations recounted what I label the quasi-independent activity of setting up a function not initiated by the senior management team (see 8.4, 9.1), a caveat for its continuance within the organisation is that it demonstrated value *to* and was seen to be of use to the organisation. There are further tensions and struggles within an individual's identity work as boundary situations where a quasi-independent identity must be squared with that of holding other, safety-critical, and not independent positions. In a paid work context Bardon, et al., (2017) theorised how middle managers dealt with issues of identity regulation through disciplinary processes. My research adds insight to the theorising of Bardon et. al, (2017) as such identity regulation processes by management are seemingly less strong in the culture of the voluntary environment where an individual is only there, and remains there, by their own choice. Should the individual, or individuals, conclude that their independence has been eroded, the threat, one less likely to be found in where the cash nexus exists, is to walk away from the work or the organisation without penalty. As I observe above attempts *at* organisational regulation of identity construction requires, in this case, volunteer identity work to address the organisations management culture (Alvesson and Wilmott, 2002), which is not as strong as in the paid work environment. Whilst the organisation researched does have disciplinary processes (see Appendix 11, Rule Book extract) these are primarily focussed on operational matters. Other processes that potentially involve, for example organisational scope, structure and scale, are broadly controlled in the heritage railway sector by an external regulator. This indicates such rules are intentionally made and intended as managerial control of individual behaviour by the organisation (Alvesson and Wilmott, 2002). My research adds understanding to theories of identity regulation (Alvesson and Willmott, 2002; Watson, 2008; Bardon, 2017) in which managerial control of identity is less and identity work frames the volunteers' anticipated outcomes of not following neither external nor internal managerial regulation.

9.3.2.3 Issues of transition in volunteering and managing

Within my research no volunteer narrated that they joined the organisation to become a manager and in Section 9.3.1.2 I discussed individuals experiences of becoming a manager. Management as a topic is considered within the literature along with other social characteristics which form the individual's framework for identity construction although mostly within a paid employment context (Brudney and Meis, 2009; Hagar and Brudney, 2015; Ward and Greene, 2018; Ybema, 2020) (see Table 2.4). The linkage for volunteers between multiple positions and multiple identities is complex with inter- and intra-organisation aspects (Ashforth, et al., 2008).

Individuals may be in a liminal situation as they undertake identity work to manage working with new situations (Wallace, 2006; Beech, 2011; Ibarra and Obodaru, 2016, 2020; Toraldo, et al., 2019; Winkler, 2019). Whilst Soderland and Berg (2018) noted that individuals may have issues dealing with liminality created by holding dual positions, in my research a number of the participants held more than two positions. This added further focus to their needing to manage a liminal persona. My research adds insight to situations where a volunteer with multiple boundaries attempts at resolution of the liminal position and tensions requires much complex identity work. If not successfully achieved the individual may remain in a liminal position between numerous boundaries.

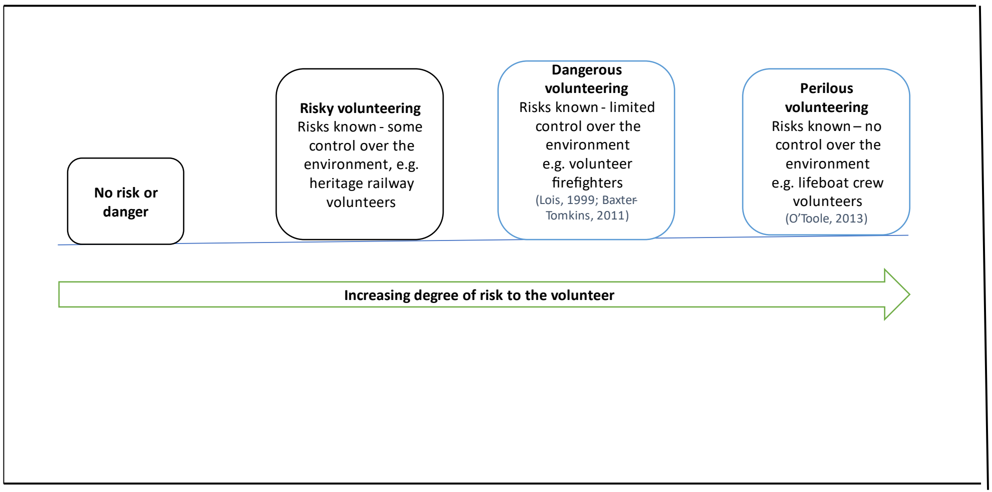
In experiencing the construction of an identity as a volunteer manager (Sveningsson and Alvesson, 2003; Watson, 2009) the individual may find fewer cues and forms of guidance (Hay, 2014; Chenhall, et al., 2016) from the voluntary environment. In the environment researched the safety-criticality demanded of the organisation by regulators requires engagement with criteria with which the individual may be unfamiliar from their prior work experience. A particular tension narrated by participants was between those who had prior work experience in the railway industry and those who did not. My analysis provided examples of those with prior railway industry experience being in a state of permanent liminality (Winkler and Kristenson, 2021) as they remained engaged with the values and work skills of their former employer providing them with the ability to demonstrate greater understanding of the heritage railway operation. However, in my research, volunteers no railway industry background and thus with less understanding required greater identity work in the process of becoming a manager. This need for greater identity work to adjust to unfamiliarity has been theorised in the literature which addresses primarily the paid work environment (Ybema, et al., 2009; Alvesson, 2010; Chenhall, et al., 2016; Brensen, et al., 2019). My research adds to the context of volunteers and their experiences of becoming a manager without prior experience (Kay, 2014), particularly in a safety critical sector, and adds further insights to transitions into new fields of activity (Cooper et al., 2018).

9.3.2.4 Risky volunteering in a safety-critical environment

Insights from my research contribute to expanding existing theories of dangerous or perilous volunteering which have been developed from studies of lifeboat crews, volunteer firefighters and disaster volunteers (Britton, 1991, Lois, 1999, Baxter-Tomkins, 2011, O'Toole, 2013, Collie and Greene, 2023) and I introduce the concept of risky volunteering. In presenting the concept of risky volunteering I add new insight to the understanding of differences between those volunteers who accept their activities may be life-threatening whilst not being sure (but not unaware) from whence risks may arise, and those engaging in risky volunteering in a safety-critical environment who are aware that risks are likely to arise and of procedures to help control such risks. I propose another nuance to theories of dangerous and perilous volunteering in that in those situations (dangerous and perilous) the subjects of the volunteers dangerous and perilous efforts are already in life-threatening circumstances, whilst in risky volunteering the intention is to anticipate and avoid potentially dangerous (risky) situations so that neither the volunteers or others find themselves in dangerous situations.

From my analysis in the safety-critical environment the risks are mostly well-understood and documented, with mitigating actions often prescribed. Therefore, volunteers working in risky situations are required to demonstrate their understanding of the actions they must take to mitigate risk. Thus, whilst volunteering in an environment in which danger is recognised, they have more control over their environment than when theorising about volunteers undertaking dangerous or perilous volunteering. I extend theories of dangerous and perilous volunteering to include risky volunteering. I present the risks volunteers face in the form of a continuum as a way of addressing limitations created by typologies (see Section 2.5 and Table 2.4). Figure 9.1 below sets out the risks to volunteers as a continuum.

Figure 9.1 Conceptualising risky volunteering within theories of dangerous and perilous volunteering.



This section has addressed the contributions to knowledge made by my thesis. Volunteering is an under-researched area and I offer insights empirically and theoretically to add to knowledge in this area. The routes into volunteering were found to be more nuanced than typologies often imply and add to understanding of entry into volunteering. Different pathways travelled by volunteers into management provide new perspectives on subsequent experience as managers. With identity as the lens the tensions at transitions experienced by participants at boundaries when joining an organisation and when holding multiple positions provide insight to theorising and with a focus on the volunteer context provide new insights to current theorising most of which addresses the paid work environment. I propose the concept of risky volunteering adding new insight to theories of dangerous and perilous volunteering. The next section will consider implications for practice arising from my thesis.

9.4 Implications for practice

From the practitioner perspective this section considers implications for the management of volunteers in a safety-critical environment arising from my findings in this thesis. As outlined in Chapters 2 and 3 both literature, and practice, make assumptions that the management of volunteers will be undertaken by paid managers and those managers use the principles of human resource management (HRM) when managing volunteers. Thus, the assumption is that practice is transferred from paid employment contexts into the volunteering situation (Einholf, 2018). However, this is an under-researched and contested area of volunteering in with approaches suggesting that the transfer of human resource management (HRM) from the paid employment environment represents the standard to which managers of volunteers should aspire (Hill and Stevens, 2011). In other perspectives, as discussed in Chapter 2, Alfes, et al., (2017) suggest HRM practices may need adapting, whilst Studer (2016) calls for more focus on the specific needs of the voluntary sector. My findings in this thesis both inform and challenge these notions.

From my research important implications for practice arise, in summary these are:

1. Creating new ways to enable young people to engage with volunteering.
2. Unpaid volunteers managing other volunteers may lack relevant people management skills.

3. Human resource practices utilised in the paid employment environment require adaptation to be contextually relevant to the voluntary sector.

I expand on each of these points below.

9.4.1 Creating new ways to enable young people to engage with volunteering

Long-serving participants in this study often narrated that they commenced their volunteering at a young age in times when health and safety, and other relevant, legislation less restrictive. In Chapters 6 and 8 they narrated how opportunities presented to engage in volunteering activities led to their commitment to the organisation. With such routes now closed to young volunteers there is a need to create new avenues to engage young people. To address this implication organisations could consider ways to promote volunteering to young people of school age, such as initiating outreach programmes with local schools to inform and enthuse children of the opportunities presented by volunteering. New routes into volunteering that meet current legislative requirements could be launched, such as creating special clubs for young people allowing them in a structured and well-supervised way to learn skills and gain experience that they can use as full volunteers once they attain the right age. The creation of apprenticeships by those voluntary organisations with the finance and a cadre of relevant paid staff provides the opportunity to create another route for young people to become involved.

9.4.2 Skill requirements of unpaid volunteer managers.

As discussed in Chapter 2, it is frequently assumed that the management of volunteers is undertaken by paid managers. Whilst there are circumstances where this is so, there are also many circumstances where this is not so. My research observes that most of those undertaking management activities in the voluntary organisation studied are unpaid volunteers, and, whilst I do not offer generalisations from my research, this is something likely to be found in other voluntary organisations. A factor here may be that not all those managing have the word “manager” or similar, in their job title and thus become overlooked (Milbourne, 2013). The lack of recognition for unpaid volunteer managers often results in little attention being focused on support for them. My thesis draws insight and attention to this important gap.

As in the paid work environment, also in the voluntary environment, the task of managing may be conceptualised in a variety of ways including that of the management of the task, and that of people management. Most volunteers joining the heritage steam railway studied were unaware at the start of their volunteering of the specific and detailed requirements of heritage railway operation. Thus, in the safety-critical environment the management of the safety-critical operational tasks need to be carefully addressed by the implementation of competency-based training frameworks. Those enable both those undertaking operational work and those managing them to carry out their activities effectively and safely.

Whilst operational training, and its management, are addressed by competency-based systems another element does not receive the same attention – that of people management. People management is an activity that refers to practices of recruiting, training, engaging, and retaining people for the organisation. These are skills not covered in operational competency-based training, nor in most cases anywhere else. It is by circumstance that occasionally a volunteer manager may bring such skills from prior work experience to the voluntary organisation.

This lack of people management skill may manifest itself in unhappy or dissatisfied volunteers, of which this thesis presents some examples and may impact on volunteer retention. Addressing this lack of skill is an issue requiring adjustments in the training of unpaid volunteer managers. As my findings in this thesis illustrate, those filling first-line supervisory positions may have arrived there from what I describe as the process of mandated formality - success in completing a training programme requiring the demonstration of operational competencies which do not include people management, or supervision, practices. In these circumstances such individuals are left to manage others as best they can, or follow their own experience of being managed in other situations.

This is a complex area in which 'quick fixes' are not appropriate and in which contextual nuance is important with voluntary organisations varying in scale, scope, and structure. There is an underpinning assumption that the people management skills of HRM practice are somehow transferrable into the voluntary organisation. There is also an assumption that unpaid volunteer managers in the organisation will be familiar with at least the basics of HRM process and practice. If in practice there is very little, or no, familiarity with HRM then it is likely understanding of why and how such skills may be transferred will be lacking.

Should circumstance occur where there is some familiarity then consideration and planning will be required to understand the HRM skills needed, and how they might be transferred to those who require them.

This is where there is something of a gulf between the paid and voluntary work environments. Organisations in the voluntary sector need, amongst other things, the time and ability to consider issues of context-relevant skills. Issues of concern include the availability of individuals able to pass on those skills, the skill of volunteers to train other volunteers, the availability of volunteer manager time for training in HRM matters, volunteer willingness to be trained (which itself raises a question of how much compulsion is effective with volunteers), and availability of funds.

The implication for practice is that resources for training in people management skills tailored to the requirements of the organisation and its volunteers need to be created or found. Given the range of issues involved particularly if there are no volunteers with HRM skills, professional advice could be sought through the Chartered Institute of Personnel and Development or through the heritage railway trade body the Heritage Railway Association. Having referred to context many times the next section addresses the contested issue of the transfer of HRM practice from the paid employment sector to the voluntary sector.

9.4.3 Human resource management practices from the paid work environment require adaptation to the voluntary sector.

There are implications arising from the notion that the transfer of human resource management practices from the paid employment environment can be made unaltered into the voluntary environment. In the voluntary sector the cash nexus does not exist between the volunteer and the organisation. This means that the expectation in the paid environment that in exchange for monetary payment an individual will concur with the organisations demands does not apply. Therefore, HRM practices that require consideration for adaptation to the voluntary sector include the key HRM activities:

- Recruitment with the sector having less finance for advertising and relying on word of mouth and social media. This might be at least partially addressed by outreach processes mentioned in Section 9.4.1.
- Selection processes which are not always seen as relevant as volunteers are in short supply. It may save time, difficulties and even money in the longer term to identify suitable time- and cost-effective selection methods for all potential new volunteers.
- Training is mostly carried out for operational matters with little focus on people management skills, or of training volunteers how to train others. This is discussed in Section 9.4.2 and requires gaining the commitment of all volunteer managers to implement effectively.
- Development activities could include the active development of volunteers for management positions. This requires a process by which volunteers might be identified, their potential agreed by senior volunteer managers and development action agreed with the volunteer.

- Performance management could be a difficult area with volunteers, but some kind of system identifying volunteers with potential for management positions could help.
- Employment relations in the less formal voluntary situation could embrace issues relating the well-being of volunteers, and could assist volunteer retention.
- Reward practice differs considerably from the paid sector however, non-financial actions such as recognition, discounts on the organisations services or similar non-financially based rewards may be of benefit for retention.
- Employment legislation is relevant with all organisations covered by health and safety legislation; and within aspects of employment legislation volunteer will be classed as workers, and thus covered by that legislation.

9.5 LIMITATIONS AND FURTHER RESEARCH

9.5.1 Limitations

As my study explored unpaid volunteers with responsibilities for the management of other volunteers, in a particular heritage steam railway, there are inevitably limitations. A social constructionist perspective was adopted and dialogical narrative analysis (Frank, 2010) utilised. As Maitlis (2020) observes any analytic choice made involves giving up other approaches. I could have made different choices which may have offered an alternative perspective on these data.

My choice of organisation to study was limited by the decision to use a heritage steam railway from organisations available in the heritage tourism sector. Within the ethnographic framework my choice to undertake research in an organisation with which I was familiar as an insider participant observer further limited the organisations to research. This also was to an extent constrained by geography and the travel time *required*. Having studied only one organisation in depth the findings from my study cannot be generalised to others as volunteers in other organisations may have other stories to narrate and my methodology did not include ideas for generalisability. Nevertheless, within qualitative research (Smith, 2018) researchers are advised not to apologise for lack of generalisability on the grounds this may demean their research. Smith (2018) argues there are ways qualitative research could be generalised including on a case-by-case basis (Chenail, 2010).

Being an insider participant observer (Spradley, 1980) has both benefits and limitations. The benefits included having access to the organisation and an understanding of the activities being undertaken by the participants that only an insider might have. The limitations as a researcher included pre-conceptions that I might have about the operation of a heritage steam railway. Also, my volunteering association with a few of the participants could have influenced me. Being aware of these personal limitations was a first step, how to manage them was the second. I consider this further in Section 9.6 below.

Those who participated in the study were a portion of those volunteers who engaged in management responsibilities, and those who did not participate may have had other narratives. At the commencement of the study those participants who met my criteria – that of being volunteers managing other volunteers – were invited by me to participate because they volunteered alongside me. This opened the way to snowballing to find other participants. There was one occasion when my gatekeeper proposed a number of individuals for interview and I decided to accept these suggestions. On another occasion following a presentation made by me at a meeting, volunteers were invited to participate. A small challenge that had to be addressed with self-selection was that one or two participants mis-understood my requirement, this becoming apparent only at the time of interview. I made the decision to continue with the interview and to retain them in the sample group, although their data was incorporated in a different manner.

A further limitation in the selection of participants was that as volunteers they are on site only when they choose and finding suitable times for them and me to be in the same place required a lot of diary management. Two interviews were conducted by phone; I consider this a limitation as the interaction between interviewer and interviewee with these two participants was, in my opinion, less satisfactory. The study was cross-sectional and whist carried out over a period of a year no individual was studied throughout that time. A longitudinal study may have identified different temporal narratives.

9.5.2 Recommendations for further research

The limitations above and the paucity of research of unpaid volunteers managing other volunteers (Einholf, 2018), provides potential areas for further research. Paid managers of volunteers have been studied (Alfes, et al., 2017) and suggestions made about how both management skills and management processes might be improved. The volunteer managers in this study narrate a variety of stories about how they came to be responsible for the management of other volunteers. This has created other ways of viewing the volunteer management position and further research in this area could add additional depth and nuance. Further research exploring understanding of how unpaid volunteer managers address the human resource management process and the level of their awareness of formal human resource management practices could be helpful.

Further study of the processes of transition into a volunteer management position could provide insights to issues of selection and training for the volunteer management position. Researchers have looked at multiple and hybrid roles in the paid employment context (McGivern, et al., 2015; Martin, et al., 2015, Spyridondis, et al., 2015) exploring mostly dual role holding. A feature of a number the narratives in the unpaid context given by participants was the holding of three or more positions often with a paid position elsewhere. Further research into the identity work undertaken in these circumstances would add to understanding of the complexities, and risks, of multiple role holding.

This was a cross-sectional study capturing narrations at one point in time, longitudinal research would add to our understanding of how volunteers experience new management responsibilities over time. As a continuing insider participant and going beyond the timescale of the study, observation has shown a number of participants have made other significant transitions within this complex safety-critical environment.

9.6 Personal reflection

The research for and writing of this thesis has been an extremely interesting, sometimes challenging journey. Whist that might sound a little trite, the interesting parts have been learning to become a researcher and putting what I have learnt into practice, the challenging parts have mostly related to other areas of life away from doctoral research. I undertook my research in an organisation and in a sector with which as a volunteer I was familiar, and as a researcher I found that there were phenomena in those environments with which I was unfamiliar.

Being an insider participant observer in the organisation I was researching had further challenges from a lifetime spent working mostly in the field of human resource management. Having for example interviewed hundreds of people over the years, mostly during selection interviews, I considered that I was quite competent to conduct interviews for this research. I was wrong. As an HRM practitioner the risk as a researcher of falling into a judgemental trap, and of having to manage responses that I felt I wanted to challenge was high during the initial interviews. However, helpfully saving me was reflexivity. A key part of the learning process for me was becoming a reflexive researcher (Alvesson, et al., 2008a; Haynes, 2012). Prior to the field work I had previously reflected in terms of methodological choices, but turning the methodologies into actions in the field was a different. I learned to stop and think about what I had experienced, be it in interviews, in observations, in informal contacts or in what had read and to understand the importance of interpretation (Alvesson and Skoldberg, 2018). Reflexivity entailed standing back from the immediate situation and thinking about it. Such thinking involved challenging my pre-conceptions and what I had understood to be 'givens'. Reflexivity was aided by the field notebooks used as a part of the ethnographic method. As well as capturing useful observations, the notebooks provided a vehicle to write down issues that were of concern in real time and write reflexively, adding another dimension to my thinking. Being reflexive I became aware of myself as a subject and object of the research process (Haynes, 2012) as I was both a volunteer and a researcher in the same organisation. On a number of occasions after the interview had concluded and the recorder turned off being asked "Was that OK, was it what you wanted?" Perceptions are two-way and being reflexive provides the researcher the opportunity to assess interactions.

9.7 Final conclusions

This thesis set out to address the research questions "How do volunteers navigate the experience of becoming managers in a complex safety-critical environment?

1. In what ways are routes to volunteering navigated?
2. What are volunteers experiences of becoming a manager?
3. How do volunteers engage with multiple position holding?

The key themes in the research questions driving the research were those of unpaid volunteers navigating ways into volunteering, and experiencing new responsibilities for managing in a safety-critical environment addressed through an identity lens.

Voluntarism, volunteering and volunteers are the subjects of a considerable literature (Rochester, et al., 2012; Holmes and Slater, 2012; Dury, et al., 2015). A little-researched area in the literature is that of volunteers managing other volunteers (Hill and Stevens, 2011, Einholf, 2018). My research investigated this and found a situation of complexity without clarity. The findings from participants' narrations produced a picture of individuals beginning their volunteering for reasons more nuanced than those more usually ascribed in typologies. Initial enthusiasms were around practical issues related to being involved in a heritage steam railway – driving a steam locomotive, using craft skills in workshops, dealing with customers. None of the participants narrated they joined the organisation to become a manager. Becoming a manager of other volunteers entailed transitions (Ibarra and Barbulescu, 2010; Bordia, et al., 2020) from the volunteers starting point in which there was a task focus to that of taking responsibility for the actions of others. This transition occurs in a safety-critical environment which brings further responsibilities. Failure in a safety-critical environment can have heavy costs: human, material and financial.

The transition to the responsibility for managing other volunteers was narrated in a mixture of pathways many differing from those found in the better-researched paid work environment (Roberts and Biddle, 1994; Ibarra, 1999; Ibarra and Barbulescu, 2010). In volunteering there is no link between level of responsibility and financial payment – the cash nexus is severed. In this study a number of the pathways to a management responsibility were found, providing participants with different and complex identity work when going through that transition, and for a few having to address liminal identities.

A number of the participants held multiple positions and the identity work involved boundary issues (MacLean and Webber 2015). Research has explored hybrid roles where for example a physician may also be involved in management activities in

addition to professional activities (Brensen, et al., 2019). A number of different boundaries were narrated in my study. There were those between paid work and voluntary work, between voluntary work in different voluntary organisations, between different positions within one voluntary organisation occasionally with holding four different positions not closely related to each other. Working as a craftsperson in a workshop a participant might also narrate additional positions as a Trustee, and as a Steward in the dining car of passenger trains. The boundary work around multiple positions occasionally entailed work to protect identity from damage when crossing boundaries. The identity work in which individuals engage can be complex.
My thesis adds the concept of risky volunteering in a safety-critical organisation to theories of dangerous and perilous volunteering with further boundary management issues to be addressed.

In summary, volunteering can be a complex process – perhaps the word complex has appeared many times in this study, but unpaid volunteers with responsibilities for managing other volunteers do deal with complexity in their identity work. In Chapter 1 I referred to Knapp and Kendall (1995, p.65) and their "loose and baggy monster" description of the voluntary sector. I trust the contributions of my thesis have given the monster a bit more shape. Whilst this study has shed some light on this area, it remains an area rich for further studies.

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APPENDICES

APPENDIX 1 – Glossary of railway terms

Technical term	What it means
Ballast	Crushed stone, usually granite, forming a base for the track.
Branch line	A railway line diverging from the main line to connect smaller habitations.
British Railways	Comprised former privately owned railways nationalised in 1948. Privatised 1994-1997.
Carriages	Vehicles for the carriage of passengers, may be First, Second or Third Class.
Diesel locomotive	Pulls trains of carriages and wagons, powered by an internal combustion engine fuelled by diesel oil.
Infrastructure	Buildings associated with the railway, e.g. stations, workshops, signal boxes,
Main line	The most important route/s between cities and large towns.
Narrow gauge	A railway with a width between the rails of less than 4’ 81/2” (1235mm).
Permanent Way	The fixed railway lines, the sleepers they sit upon, the ballast that supports the sleepers, and the vegetation on either side of the line.
Pullman coaches	Pullman coaches, originally introduced in 1874, are First Class luxury dining carriages with silver service. Sometimes made into complete trains, sometimes along with other coaches.
Rails	The fixed metal surface on which trains run.
Railway	A track constructed for wheeled vehicles (Simmons (1986).
Rolling stock	The coaches and wagons that comprise the vehicles made into trains to be pulled by locomotives.
Rule Book	A handbook detailing how the railway is to be operated, detailing specific

	methods to be used. Knowledge of the relevant sections is required of all operation staff.
Standard gauge	A railway with the width between the rails of 4’ 8 1/2” (1235mm).
Steam locomotive	Pulls trains of carriages or wagons, powered by steam created by burning coal to boil water to a high pressure.
Track	The pairs of rails upon which the trains run, and the associated *sleepers* and *ballast* on which the rails are set.
Wagons	Vehicles for the carriage of goods.
Working Timetable	A document for staff showing in detail how trains are scheduled to operate.

APPENDIX 2 – Definitions of safety-critical activities

The Railways and Other Guided Transport Systems (Safety) Regulations 2006

PART 4SAFETY CRITICAL WORK
Interpretation and application of Part 4

23.—(1) In this Part—

"assessor" means any person who is competent to make an impartial and objective assessment of another person's competence or fitness to carry out safety critical work, and related expressions shall be construed accordingly;

"controller of safety critical work" means any person controlling the carrying out of safety critical work on a transport system or in relation to a vehicle used on a transport system;

"fitness" means physical and mental fitness, and related expressions shall be construed accordingly;

"installation" includes the installation, examination or testing of components;

"maintenance" includes repair work, reconditioning, examination, testing or alteration;

"operator" means any person carrying on an undertaking which includes a transport system or any part of it or the provision of transport services on such a system;

"safety critical task" means—
(a)

in relation to a vehicle used on a transport system—
(i)

driving, dispatching or any other activity which is capable of controlling or affecting the movement of that vehicle;
(ii)

signalling, and signalling operations, the operation of level crossing equipment, receiving and relaying of communications or any other activity which is capable of controlling or affecting the movement of that vehicle;
(iii)

coupling or uncoupling;
(iv)

installation of components, other than where the installation of those components is subject to supervision and checking by a safety critical worker or a controller of safety critical work;
(v)

maintenance, other than where the carrying out of that maintenance is subject to supervision and checking by a safety critical worker or a controller of safety critical work; or
(vi)

checking that that vehicle is working properly and, where carrying goods, is correctly loaded before being used;
(b)

in relation to a transport system—
(i)

installation or maintenance of any part of it or of the telecommunications system relating to it or used in connection with it, or of the means of supplying electricity directly to that transport system or to any vehicles using it or to the telecommunications system other than where the carrying out of that task is subject to supervision and checking by a safety critical worker or a controller of safety critical work;
(ii)

controlling the supply of electricity directly to it or to any vehicles used on it;
(iii)

receiving and relaying of communications; or
(iv)

any person ensuring the safety of any persons working on or near to the track, whether or not the persons working on or near to the track are carrying out safety critical work;
(c)

in relation to training, any practical training or the supervision of any such training in any of the tasks set out in sub-paragraphs (a) to (b),

which could significantly affect the health or safety of persons on a transport system;

"safety critical work" means any safety critical task carried out by any person in the course of their work or voluntary work on or in relation to a transport system and related expressions shall be construed accordingly; and

"telecommunications system" means any telecommunications system provided by a transport operator or its associated equipment, which is capable of controlling or affecting the movement of a vehicle, or which is provided by a transport operator for purposes which include calling the emergency services.

(2) Any reference in this Part to a safety critical worker or a controller of safety critical work supervising and checking the work of another person is to a safety critical worker or a controller of safety critical work who has been assessed as competent in the tasks to which that supervision and checking relates.

(3) Any reference in this Part to a person controlling the carrying out of safety critical work is a reference to a person managing, supervising or controlling that work in connection with the carrying on by him of a trade, business or other undertaking (whether or not for profit).

(4) This Part shall not apply to or in relation to—

(a)the police, ambulance or fire service when they are carrying out their emergency functions on or in relation to a transport system; and

(b)any voluntary worker for a period of twelve months from the date of the coming into force of this Part.

Appendix 3 – Contents of the Country Railway Rule Book

CONTENTS

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RULES

APPENDIX 4 - News item for Volunteer Newsletter

WHAT IS IT LIKE TO BE A VOLUNTEER?

You might answer that it is, undoubtedly, something to do with working safely, carefully and professionally but there could be more to it than that.

Roger Fagg, a Country Railway volunteer who is also doing a research degree at London University is interested in finding out about some of the 'more'.

The Board has agreed that he can do his research with Country Railway volunteers so over the next few months (when not on Porter duties at the station), Roger will be seen around the Railway talking to volunteers and sometimes just watching and noting what is going on.

He is particularly interested in what people think about being a volunteer. It will be impossible to talk to everyone – Country Railways 700 volunteers would probably take several years!

He will ask people if they are willing to take part in his research. If you do not want to, it will be fine just say "no thanks".

The research will be completely anonymous – no one will be identified by name, and it is not concerned in any way with how well people are doing their jobs. It is only about how you feel about being a volunteer.

We hope that the research will help the Country Railway, and other heritage bodies, to understand a bit better some of the things around what it means to be a volunteer. When the research is finished the results will be available to anyone who is interested.

If you have any questions you can contact Roger at [redacted]] or talk to him when you see him around.

Here's what he looks like! (photograph)

[NAME], Chairman.

APPENDIX 5 – Participant Information Sheet

RESEARCH INFORMATION SHEET
"Unpaid volunteers managing volunteers"

Who am I?

My name is Roger Fagg and I am a part-time PhD student in the Department of Organisational Psychology at Birkbeck, University of London. I am also a part-time Associate Lecturer in the same Department. Relevant to the research I am undertaking, I have been involved in the heritage railway movement for 16 years and developed an interest in how volunteers manage other volunteers. I volunteer at two heritage railways.

What am I doing?

My research will focus on the experiences of those unpaid volunteers who supervise or manage the work of other volunteers – specifically managers who are volunteers and are not paid staff. I have already undertaken some pilot research, and now am doing the main part of my work. I am researching the experiences of volunteers who are in supervisory or management positions to try to find out more about how they came to be in that position, how they perceive the role, and how their volunteering fits into their busy lives. The research will involve interviewing people one-to-one or talking in small groups, attending some meetings and generally being around the railway seeing how volunteers with different roles and responsibilities work together.

What do I need from you?

I am seeking volunteers who currently have the supervision/management of other volunteers as part of their role to participate in an interview or group discussion. I also would like to talk to volunteers who do not hold such roles. The interviews and group discussions will be about how you came to be in the role, how you view your role, and your experience of working relationships.

Interviews and/or group discussions (probably lasting around an hour) will be in absolute confidence and at a mutually convenient time and place. Your responses will be anonymised. If you choose to participate you will be asked a number of questions, but you do not have to answer any question if you do not wish to. You can withdraw from the study at any point, you will need to notify me by one month after the interview/group discussion after which time the data will have been amalgamated into a larger dataset and it is no longer feasible to unpick it from other data.

Before the interview commences you will be asked to sign a Consent Form giving further information about your rights during the research and guaranteeing confidentiality. The interview/group discussion will be recorded (if you agree) and physical and electronic transcriptions produced which will be anonymised and stored in a secure place. You can ask not to have the interview recorded or ask to have the recording stopped at any time during the interview. No information that could identify any individual will be used.

Who will this research benefit?

For participants: This research will be of interest should they would like to share their experiences of being a volunteer manager. Anonymised results will be included in the final thesis and a summary will be made available to individuals and organisations to help inform/shape and develop the roles of managers in the voluntary sector.

For academia and practitioners: This research will expand and enhance understanding about the volunteer supervisor/manager role when considering how the role develops and the variety of experiences within the role that an individual might encounter and manage.

I am very grateful for your participation in this research and for your time helping me with my research.

If you would like any further information please get in touch with me at:

Email: [redacted]
Or [redacted]
Or on (mobile number)

APPENDIX 6 – Participant Consent Form

RESEARCH CONSENT FORM

Please read the following before participating in this research:

- I have read the Information Sheet and have had the details of the study explained to me. My questions have been answered to my satisfaction and I understand that I may ask further questions at any time.
- I understand I have the right to request any data I have provided and any data relating to me be withdrawn from the study at any time, up to one month after the interview after which the data will have been amalgamated into a larger dataset and it is no longer feasible to unpick it from the other data.
- I understand I have the right to decline to answer any particular questions.
- I agree to provide information to the researcher on the understanding that my name will not be used without my permission. (The information will be used only for this research and publications arising from this research project).
- I agree/do not agree to the interview being recorded.
- I understand that I have the right to ask for the recording device to be turned off at any time during the interview.
- I agree to participate in this research under the conditions set out in the Information Sheet.

Signed by:

The researcher: .... Date: ....

The interviewee: .... Date: ....

Consent Form CF 1 I/V 0618 v1.2

APPENDIX 7 – Interview schedule

INTERVIEW QUESTION SCHEDULE

Information Sheet?

Consent Form signed?

Tape OK? I may also take a few notes so as not to miss anything.

How long have you been a volunteer here?

How did you come to be a volunteer here?

What roles have you had since you started?

What role/s do you currently have with the railway?

Tell me how you came to be in this role/s?

How important to you is this role/s?

How does the role fit in with your life generally?

What is it like being a volunteer here?

Tell me about some of the things you have had to deal with when managing/organising the work of other volunteers.

What do you think are your strengths, and weaknesses, in the role/s you undertake?

How important is being a volunteer to you?

What do you get out of your volunteering – for you?

Is there anything you would miss if you no longer volunteered?

Is there anything else you would like to add?

Trustee/Governor/Director only

The roles as a T/G/D and active manager could be quite different – why do you do both/all?

Probes as appropriate.

Interview Schedule 2 1118 v1.5

Appendix 8 – Thematic analysis checklist

20-point checklist from (Braun and Clarke (2020, pp.18-19)

Table 1. A tool for evaluating thematic analysis (TA) manuscripts for publication: Twenty questions to guide assessment of TA research quality.

These questions are designed to be used either independently, or alongside our methodological writing on TA, and especially the current paper, if further clarification is needed.

Adequate choice and explanation of methods and methodology

1. Do the authors explain why they are using TA, even if only briefly?
2. Do the authors clearly specify and justify which *type* of TA they are using?
3. Is the use and justification of the specific type of TA consistent with the research questions or aims?
4. Is there a good 'fit' between the theoretical and conceptual underpinnings of the research and the specific type of TA (i.e. is there conceptual coherence)?
5. Is there a good 'fit' between the methods of data collection and the specific type of TA?
6. Is the specified type of TA consistently enacted throughout the paper?
7. Is there evidence of problematic assumptions about, and practices around, TA? These commonly include:

- Treating TA as one, homogenous, entity, with one set of – widely agreed on – procedures.
- Combining philosophically and procedurally incompatible approaches to TA without any acknowledgement or explanation.
- Confusing summaries of data topics with thematic patterns of shared meaning, underpinned by a core concept.
- Assuming grounded theory concepts and procedures (e.g. saturation, constant comparative analysis, line-by -line coding) apply to TA without any explanation or justification.
- Assuming TA is essentialist or realist, or atheoretical.
- Assuming TA is only a data reduction or descriptive approach and therefore must be supplemented with other methods and procedures to achieve other ends.

8. Are any supplementary procedures or methods justified, and necessary, or could the same results have been achieved simply by using TA more effectively?
9. Are the theoretical underpinnings of the use of TA clearly specified (e.g. ontological, epistemological assumptions, guiding theoretical framework(s)), even when using TA inductively (inductive TA does not equate to analysis in a theoretical vacuum)?
10. Do the researchers strive to 'own their perspectives' (even if only very briefly), their personal and social standpoint and positioning? (This is especially important when the researchers are engaged in social justice oriented research and when representing the 'voices' of marginal and vulnerable groups, and groups to which the researcher does not belong.)
11. Are the analytic procedures used clearly outlined, and described in terms of what the authors actually did, rather than generic procedures?
12. Is there evidence of conceptual and procedural confusion? For example, reflexive TA (e.g. Braun and Clarke 2006) is the claimed approach but different procedures are outlined such as the use of a codebook or coding frame, multiple independent coders and consensus coding, inter-rater reliability measures, and/or themes are conceptualised as analytic inputs rather than outputs and therefore the analysis progresses from theme identification to coding (rather than coding to theme development).
13. Do the authors demonstrate full and coherent understanding of their claimed approach to TA?

A well-developed and justified analysis

14. Is it clear what and where the themes are in the report? Would the manuscript benefit from some kind of overview of the analysis: listing of themes, narrative overview, table of themes, thematic map?
15. Are the reported themes topic summaries, rather than 'fully realised themes' – patterns of shared meaning underpinned by a central organising concept?

- If so, are topic summaries appropriate to the purpose of the research?
  - If the authors are using reflexive TA, is this modification in the conceptualisation of themes explained and justified?
- Have the data collection questions been used as themes?
- Would the manuscript benefit from further analysis being undertaken, with the reporting of fully realised themes?
- Or, if the authors are claiming to use reflexive TA, would the manuscript benefit from claiming to use a different type of TA (e.g. coding reliability or codebook)?

16. Is non-thematic contextualising information presented as a theme? (e.g. the first 'theme' is a topic summary providing contextualising information, but the rest of the themes reported are fully realised themes). If so, would the manuscript benefit from this being presented as non-thematic contextualising information?
17. In applied research, do the reported themes have the potential to give rise to actionable outcomes?
18. Are there conceptual clashes and confusion in the paper? (e.g. claiming a social constructionist approach while also expressing concern for positivist notions of coding reliability, or claiming a constructionist approach while treating participants' language as a transparent reflection of their experiences and behaviours)

19. Is there evidence of weak or unconvincing analysis, such as:

● Too many or two few themes?

(● Too many theme levels?

● Confusion between codes and themes?

● Mismatch between data extracts and analytic claims?

● Too few or too many data extracts?

● Overlap between themes?

20. Do authors make problematic statements about the lack of generalisability of their results, and or implicitly conceptualise generalisability as statistical probabilistic generalisability (see Smith 2017)?

APPENDIX 9 – List of participants

Interviewee number	Gender	Years volunteering	Location
8	M	15	Footplate
9	M	19	Footplate
10	M	10	Footplate
11	M	45	Footplate
12	M	4	Footplate
13	F	7	Footplate
14	M	3	Footplate
15	M	44	Footplate
16	M	1	Footplate
17	M	45	Footplate
18	M	10	Footplate
19	M	33	Footplate
21	M	6	Footplate
22	M	12	Footplate
23	F	23	Footplate
24	F	25	Footplate
25	F	1	Footplate
26	M	42	Footplate
34	M	6	Footplate
40	M	20	Footplate
1	M	11	Station
2	M	7	Station
3	M	7	Station
4	M	3	Station
5	M	10	Station
6	M	7	Station
7	M	6	Station
30	M	16	Station
31	M	6	Station
33	M	17	Station
36	M	10	Station
39	M	46	Station
43	M	14	Station
44	M	7	Station
32	F	36	Workshop
27	M	15	Workshop
28	M	10	Workshop
37	M	35	Workshop
38	M	60	Workshop
42	M	49	Workshop
35	M	58	Workshop
29	F	1	*Office*
41	M	12	*Office*
20	M	16	*On-train*

APPENDIX 10 – Extract from the Country Railway Rule Book disciplinary items

These Rules are based on The British Railways Rule Book dated 1950 (as amended to 1st October 1961) and the numbering sequence has been retained.

(Note: "Staff" includes paid staff and volunteers)

RULES

GENERAL
1. (a) All members of the staff must attend at such hours as may be required, promptly obey persons placed in authority over them, and conform to all the Rules and Regulations of the Country Railway.
(b) Every member of the staff must assist in carrying out the Rules and Regulations, and must immediately report to his superior officer any infringement thereof, or any occurrence which may come under his notice affecting safe and proper working.
(c) The name and address of each member of the staff must be recorded within the department(s) to which he is attached and any change of address must be at once notified.
(d) Not applicable to The Country Railway.
(e) Volunteer members of the staff are required to join The Country Railway Preservation Society and to remain in membership throughout their period of their service on the staff.
(f) Members of the staff may, from time to time, be required to undergo medical, eyesight, practical or educational examinations in accordance with the regulations in force.
(g) Incorporated into the Paid Staff Written Conditions of Employment.
(h) When a member of the staff leaves the service he must immediately deliver up his Rule Book, uniform (if it was supplied by the Country Railway) and all other articles belonging to the Country Railway.
(i) Not applicable to The Country Railway.
2. Members of the staff MUST --
(i) see that the safety of themselves, other members of the staff and the public is their chief care under all circumstances.
(ii) be prompt, civil and obliging, afford every proper facility for the Country Railway's business, give correct information, and, when asked, give their names without hesitation.

Rules 2-4
(iii) when on duty be neat in appearance and, where supplied, wear uniform and badge.
(iv) if required, make good any article provided by the

Country Railway when damaged by improper use on their part.
3. Members of the staff MUST NOT --
(i) absent themselves from or exchange duty, or alter
appointed hours of attendance except in accordance with the
practice current within their departments.
(ii) solicit gratuities.
(iii) appropriate to their own use any property of, or in the
possession of, the Country Railway.
(iv) waste or wantonly destroy stationery, stores or any
other property of the Country Railway.
(v) report for duty when unfit for work through drink or
drugs, consume intoxicating liquor or ingest controlled drugs
except where prescribed by a doctor (any restrictions recommended
by the doctor must be observed), while on duty or be on duty at
any time when the proportion of alcohol in his breath, urine or
blood exceeds the limits laid down in Section 38(2) of the
Transport and Works Act 1992 or any regulations made thereunder.
(vi) not applicable to the Country Railway.
(vii) use radio sets or similar apparatus whilst on duty
except in places where this is specially authorised.
(viii) use mobile telephones when on duty except where
operationally necessary
(ix) admit liability or make any comments prejudicial to the
Company to, or in the presence of, the media and public.
4. The Country Railway may at any time:-
(i) dismiss without notice or,
(ii) suspend from duty and, after enquiry, dismiss without
notice or,
(iii) suspend from duty as a disciplinary measure

a member of the staff for any one or more of the following
offences:-
(a) drunkenness or being under the influence of drugs,
(b) disobedience of orders,
(c) misconduct or negligence,
(d) absence from duty without leave.

APPENDIX 11 – Presentations of this research in progress

15 Nov 2015	Heritage Railway Association Seminar – Mid-Week Seminar and Meeting – Crewe
21 Oct 2016	Birkbeck, Departments of Organizational and Management Annual PhD Conference
4 Sep 2017	British Academy of Management, Doctoral Symposium, Warwick University
20 Jun 2017	Birkbeck, Departments of Organizational and Management Annual PhD Conference
25 Jun 2018	Birkbeck, Departments of Organizational and Management Annual PhD Conference
17 Jun 2019	Birkbeck, Departments of Organizational and Management Annual PhD Conference
2 Sep 2019	British Academy of Management, Doctoral Symposium Aston Business School, Aston University
6 Sep2021	British Academy of Management Doctoral Symposium, “Conference in the Cloud”
17 Jun 2022	Birkbeck, Departments of Organizational and Management Annual PhD Conference