Trial of Empathy Mapping as a Tool for Exploring Staff Perceptions of Volunteers and Approaches to Volunteer Management.

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Executive Summary

Hybrid organisations, those that combine nonprofit or social mission objectives with commercial revenue-generating activities represent a significant proportion of the organisational landscape. For hybrid organisations in the heritage sector unique challenges with ambiguous roles, differing levels of responsibility and balancing conflicting priorities can impact organisational success and sustainability. Understanding volunteer management (including issues of retention, motivation, and integration) in settings with differing degrees of hybridity can inform best practices for resource allocation, role clarity, and inclusive management. In doing so the research can ultimately strengthen civil society's capacity to serve diverse communities efficiently, yet the impact of organisational hybridity on volunteer management within these contexts remains underexplored.

To attend to this gap in understanding, the authors carried out a trial of methods for a proposed research project on volunteer management in cultural organisations. The trial was carried out with staff at The Auckland Project, a multi-site cultural regeneration charity located in and around Bishop Auckland. Our analysis focused on three teams within the organisation that involve volunteers: gardening, education and visitor services.

The trial involved the use of a visual tool, 'empathy maps', within semi-structured interviews, to elicit the ways that staff think about and work volunteers. Content analysis of the interviews was used to develop and understanding of each staff member's way of managing volunteers. The results from the analysis provided the starting point for a focus group with the same staff to further explore volunteer management practices within the organisation.

The empathy maps largely functioned as anticipated but they did not elicit discussion of the staff member's career history in sufficient detail for the proposed project. Additional questions will be needed for that purpose. The introduction of the empathy map may need changing when carrying out the interview with senior management who do not work with volunteers but who make decisions that impact on volunteers' experiences.

In order to make best use of the interview data in the focus group, we needed to ask permission to share excerpts from interviews. This is in tension with the consent form. In future, the consent form would need modifying to allow for this.

The use of the coding tree from the analysis of the interviews and a schematic illustrating the outcomes of the analysis provided useful starting points for the focus group. Additional questions complemented these and enabled the team to explore the key issues in sufficient detail.

The interactions between the team leads and their volunteers had different characteristics, in two cases the data indicated that there was more mutual care between leads and volunteers. We hypothesised

that this, in part, is because these staff are younger women and therefore evoke a certain set of behaviours from the older volunteers.

The teams lead their volunteers in different ways. Difference in how volunteers were thought of and managed was seen as being acceptable, even necessary. It was seen as reflecting differences in the nature of the volunteering activity in each team, how they work with the staff and the personalities of their volunteers.

Despite different practices, common values (shared between the staff) were seen as being important to the way staff worked and the volunteers' experiences.

Introduction

Understanding volunteer management in hybrid organisations is important for three fundamental reasons: First, theoretically, hybrid organisations reveal limitations in existing volunteer management frameworks. They require us to theorise institutional complexity, relational governance, and the management of competing logics that are underexplored in current scholarship. Secondly and practically, the proliferation of hybrid organisational forms in policy, cultural work, and community development means that volunteer managers increasingly operate in these ambiguous spaces. Without better understanding of dynamics specific to hybridity, practitioners are left to improvise, often reproducing inequities or unsustainably burdening volunteers. Third, normatively, hybrid organisations represent important experiments in democratic participation and co-production. If these models are to fulfil their promise of sustainable development, they must understand and address the volunteer management dynamics that either enable or obstruct that development.

This report presents the findings from a trial of an experimental method (empathy mapping) to determine whether it would be a suitable tool for exploring the attitudes of staff in a hybrid cultural organisation towards volunteers and volunteer management. The report outlines the background to the trial, the method and the findings from the method and our conclusions regarding its suitability.

Cultural heritage organisations are increasingly hybrid and, across the sector, embody a variety of forms of hybridity. Furthermore, they frequently involve volunteers in their work. Through conversation with cultural heritage volunteer managers, in particular Michele Armstrong, Head of Volunteering at The Auckland Project (TAP), we (Davenport & Prescott) have begun to develop a funding application for a project exploring volunteer management in larger cultural organisations. In such cultural organisations the task of volunteer management is distributed across multiple staff (e.g., Senior Gardener or Education Officer) whose role may involve working with volunteers but who may not share a common understanding of why volunteers are being involved or how that should be done. In addition, senior managers do not necessarily work with volunteers, but they may make decisions that impact on the roles and experiences of volunteers within the organisation. The premise of the project is that these staff do not (necessarily) share a common understanding of why volunteers are being involved or how that should be done.

The proposed project has the following research questions:

1. How does the extent, nature and history of hybridity within a cultural heritage organisation impact on approaches to volunteer management within the organisation?

2. How is the responsibility for volunteer management shared across different cultural heritage organisations?

3. Where responsibility for volunteer management is distributed across staff within an organisation, how do those staff understand the rationale for volunteer involvement and to what extent is that shaped by their own career trajectories?

4. How do differences in the rationale amongst staff impact on the daily practices of volunteer management and the outcomes of those organisations' work?

5. Can a shared and mutually agreed understanding of the rationale for volunteer management transform organisational practices around volunteer management?

In order to explore these issues, we needed a suitable method and, for the sake of strengthening our application, we needed to demonstrate that the method worked. Based on Prescott's prior experiences, we decided to use empathy mapping as a core method (see below). The staff at TAP agreed to take part in a methods trial.

Methodology

Pilot Organisation – The Auckland Project

The Auckland Project (TAP) is a heritage organisation based in Bishop Auckland[1]. It incorporates 7 attractions based in or around the town and describes itself as a regeneration charity which aims to "establish Bishop Auckland as a must-visit cultural destination" and combine cultural tourism with community engagement to regenerate Bishop Auckland. The 7 attractions are: Auckland Palace, Faith Museum, Auckland Gardens, Spanish Gallery, Mining Art Gallery, Deer Park, Weardale Railway.

The starting point for the development of TAP was the purchase of a sequence of paintings by Fransisco de Zubarán along with the building they were housed in - Auckland Castle (now Auckland Palace) by Jonathan Ruffer, TAP's founder. The castle and paintings were placed under the care of Auckland Castle Trust. The organisation has subsequently grown to incorporate the other attractions within the TAP portfolio.

TAP was chosen for the pilot project partly on the grounds that project idea grew out of conversations between Davenport and Armstrong. Beyond this, by positioning itself as a 'regeneration charity' which sought to achieve a balance between commercial revenue generation and community engagement, TAP can be seen as drawing on a distinctive mix of commercial and charitable organisational norms and practices. The balance of this mix has ostensibly shifted over the course of the organisation's existence. These changes to the organisation and their implications for staff-volunteer relations speak to the core interests of the proposed project.

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[1] The following information is based on conversations with staff and the organisation's website (https://aucklandproject.org/)

There were 3 parts to the trial:

- Semi-structured interviews with empathy maps as a tool for stimulating and structuring the interview.
- Content coding of the interview transcripts and reflection on the coding.
- Focus group with interview participants to discuss the similarities and differences that were identified through the analysis.

Semi-structured interviews with empathy mapping

Semi-structured interviews were carried out with 5 members of staff who were recruited with the support of Armstrong (Head of Volunteering at TAP). Davenport & Prescott led the interviews jointly.

The roles of the staff were:

- Senior Gardener
- Education Officers
- Visitor Operations Volunteer Co-ordinator
- Human Resources Manager

The interviews took place with the staff individually, apart from the Education Officers who were interviewed together. All the staff were currently involved in supervising volunteers[2] with the exception of the Human Resources Manager, who had experience of managing volunteers earlier in her career at TAP. All were carried out in a single day.

The interviews were structured by an empathy map, see Figure 1, as a structuring tool for the interview. The map was explained, and staff were invited to write in the empathy map, responding to the prompts in the map, and discuss what they were writing as they did it.

The interviews lasted: 46, 53, 54 and 62 minutes and were recorded on a digital audio recorder.

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[2] In the study, we make a distinction between volunteer *management*, which involves the administration of the volunteering programme, and volunteer *supervision*, which involves working with and supporting volunteers in the delivery of their day-to-day activity.
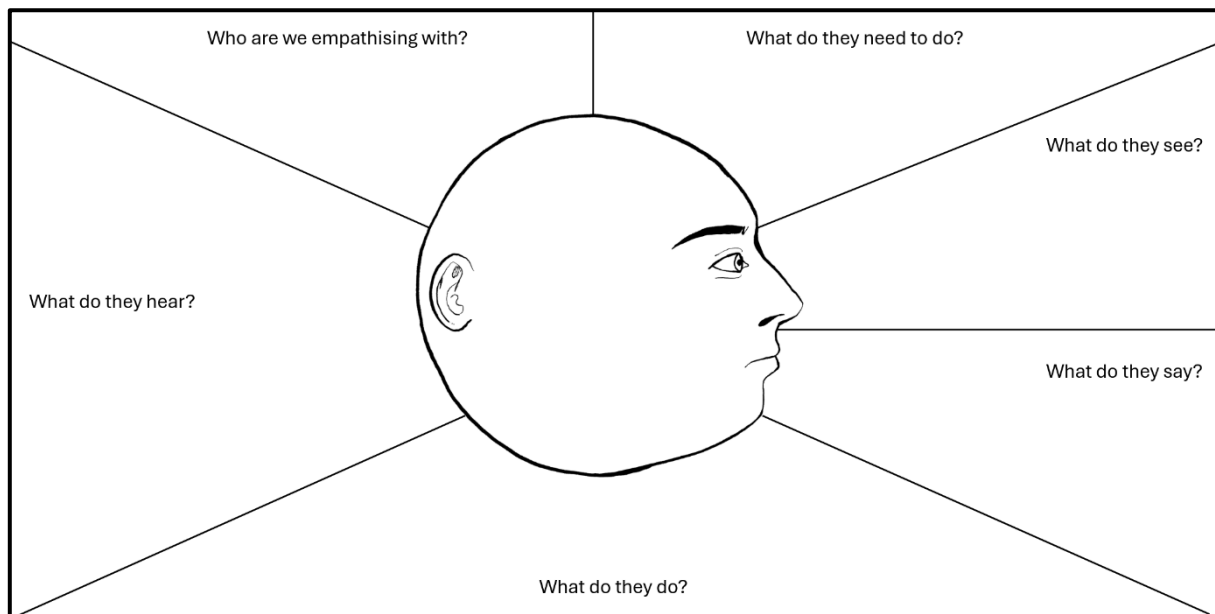
Figure 1: Empathy map

Analysis of interviews

The recordings were initially transcribed using the 'transcription' function within MS Word. These were then fixed by Davenport to provide a legible but verbatim representation of the conversation. Uncertainties and over-talking were indicated in the transcript. Interjections and other responses from the interviewers (e.g., "Mhm") were captured where these contributed to the structure and flow of the conversation but were otherwise omitted as this improved the readability of the transcript.

An initial content coding of one interview was carried out concurrently by Davenport and Prescott to see what we, as researchers, attended to in the text. We then discussed our coding and then continued to code the remaining interviews. Prescott took a paper-based approach while Davenport used NVivo software.

Our coding attended to both the language used to talk about volunteers (verbs, adjectives and adjectival phrases) and to the descriptions of how volunteers were supervised. Once we had completed our coding, we then compared our findings and sought an agreed synthesis of what we felt was revealed through the interviews. At this point we focused on the Head Gardener, Education Officers and Visitor Service Operations Manager as these embodied current practices within the organisations. We summarised the synthesis in a schematic (see below).

Focus Group

The focus group included all the interview participants and Armstrong, in her role as Head of Volunteering, though she took a deliberate backseat in the focus group conversation.

At the outset, we reminded everyone of what we were doing and why then we explained what content coding involved. We also needed to seek their permission to show them the content coding. This was an important learning point for us. Following the conventional consent process for research interviews, we stated that only the research team would see the transcript. However, for the focus groups to work well, we needed to show the participants excerpts from those interviews. This contravened the promise of non-disclosure in the consent.

We showed the group the coding tree in NVivo and opened some of the codes to show the quotes that underpinned them. As an opening question, we asked the group whether they recognised themselves in the quotes.

Following this we presented our schematic of the different ways that (we thought) they talked about and managed volunteers. Again, we asked if they recognised these summaries.

Throughout this process we also attended to both verbal and non-verbal aspects of interaction which indicated emotional responses to our analysis.

The remainder of the discussion was structured around 2 questions: (1) We think that you talk about and work with volunteers in different ways – do you agree? (2) Does it matter if you work with volunteers in different ways?

We did not generate a full transcript of the focus group as, based on our experience of transcribing the interview with the Education Officers, we felt that this would be too time-consuming. Instead, we listened back to the recording and made hand-written notes on analytically significant pieces of interaction along with the time at which they occurred.

Results & Analysis

In this section we discuss the result of the empathy mapping interviews and the focus group. Since the purpose of the trial was to test our chosen methods, this section presents our assessment of the efficacy of each method and what we learnt from each method.

Empathy map as method

Once it was explained, the participants responded well to the empathy map. One staff member declined to write anything. In the interview with the Education Officers, one staff member took the role of scribe, but both contributed to the conversation. In two of the interviews, the participants took the approach of identifying a single volunteer as a key figure and applied the prompts in the map to that person. Another interviewee approached the central figure as 'volunteers in general' whilst another shifted between thinking about volunteers in general and reflecting on specific instances and individuals.

The prompts within the map fostered discussion about the daily experiences of volunteers. This, in turn, revealed much about how the staff work with the volunteers and how they, as staff, thought about volunteers. The discussion elucidated how the work of the volunteers fitted within the work and goals of each team. The discussion with the Human Resources manager turned to more strategic issues, though they did also reflect on experiences earlier in their career at TAP when they were working more directly with volunteers.

What the discussion did not (sufficiently) draw out were the career histories of each staff member nor were we able to explore the history of the organisation and the trajectory of its organisational practices. The latter featured in some of the interviews, but the detail was inadequate for the analytical needs of the project.

Empathy map – results and analysis.

The coding tree is presented in Appendix 1. As anticipated, the framing of the empathy map encouraged the participants to talk about the volunteers. Participants chose to identify a particular exemplar volunteer were more likely to talk about the character of that person and their relationship. This generated a lot of adjectives regarding the volunteers. The coding highlighted that there were very few adjectives (or adjectival phrases) used across more than one interview which suggests that they thought about their volunteers quite differently.

The talk also touched on the relationships between the volunteers and the staff. In two of the interviews, this took the form of the volunteers taking a quasi-grandmaternal role and introduced some ambiguity in who was managing whom. Or, drawing on ideas from relational caring, it could suggest that the caring relations within these teams work in multiple directions, with some volunteers also caring for the staff.

It is notable that these comments came from staff who were younger and female although the code, "Caring for volunteers" was applied to all the interviews with volunteer supervisors.

The sections of the map that encouraged the participants to reflect on volunteers' experiences generated talk about day-to-day working practices. This was helpful in drawing out how staff managed volunteers and how that fitted into their daily activity[3]. This was not captured within the coding but was identified by reading across the transcript. This led us to summarise how each interviewee talked about volunteer task allocation and management. This was summarised in the following schematic (Figure 2).
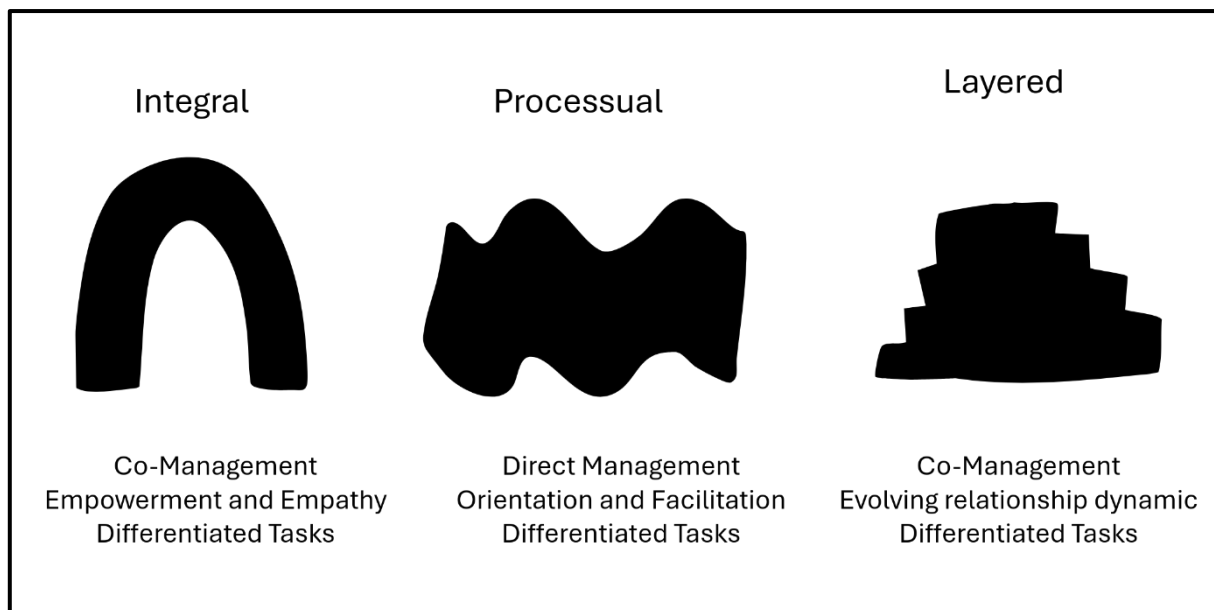

Integral	Processual	Layered
Co-Management	Direct Management	Co-Management
Empowerment and Empathy	Orientation and Facilitation	Evolving relationship dynamic
Differentiated Tasks	Differentiated Tasks	Differentiated Tasks

Figure 2: Relational models

Our analysis highlighted how the volunteer supervisors' roles, goals and daily activities were quite distinct. The place, or function, of volunteers within that is also distinct. Our data also suggested that there was very little cross-over of volunteers between teams though there was potential for crosstalk between volunteers on different teams. We identified 3 models[4], for the purposes of anonymity we've labelled them A, B & C.

A: Integral model. The staff and volunteers work on a shared task. The staff are clearly the leaders and there are clear limits to the volunteers' responsibilities, nonetheless they clearly work together and share in the responsibility for the successful delivery of the task. Volunteers are empowered within that task to play to their strengths. The relationship could be characterised as co-management (or mutual care).

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[3] At this point, for the sake of grammatical simplicity, we will refer to the two Education Officers as a single person.
[4] It is at this point that the challenge of anonymity (or de-identification) starts to become apparent. The easiest and clearest approach would be to explicitly link relational models to the supervisors' roles but in such an organisation that would make it too easy to link the data to the person via a quick online search.

B: Processual model: Staff and volunteers work on separate tasks. The team has a set of goals, but the volunteers work on certain aspects of that which liberates staff time to work on other tasks. The role of the supervisor is orientation and facilitation of the task with far less emotion-linked talk which suggest that volunteers are managed but that the mutual care was a less salient aspect of the role.

C: Layered[5] model: Here the role of the supervisor is to organise and direct volunteers whose tasks involve them operating independently within the museum spaces. The supervisor also acts as an interface between the volunteers and other staff in the organisation. In this capacity, the relationship dynamic between the supervisor and the volunteers has evolved over time as the relationship between these volunteers and the organisation has evolved over time. At the time of the interview, relationship could be characterised as co-management (or mutual care).

Focus group as method

The group verbally consented to us showing them identifiable excerpts from the interview transcripts as part of the focus group process. The focus group would have been possible without this, but it simplified matters. This issue needs to be reckoned with in any subsequent project and built into the consent process. The other option would be to ensure full de-identification, including filenames, before we get to this step in the process.

Members of the group were able to pick out codes that they identified as things they might say. Some were comfortable with the coding; others were less so and seemed to read the codes as an implicit value judgement.

We initially presented the 3 relational models anonymously, but the participants asked us to explicitly name who we (the researchers) thought each model applied to. We agreed to do so but, as above, this needs to be reckoned with in the consent process. Furthermore, there is potential here for group dynamics to play a role in implicitly obliging people to agree to being identified when they would prefer not to. It would be better to present each model to the relevant person and obtain individual agreement before the focus group.

Focus group – results

The participants agreed with our conclusion that they spoke differently about volunteers. They recognised our codes as capturing aspects of their talk. Overall, their responses to these were positive but there was some ambivalence (from particular participants) about the more negative adjectives.

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[5] In the version presented to the focus group this was labelled the 'Hierarchical model' but the focus group conversation highlighted how this term could be misleading, and we agreed to re-label it.

The participants recognised the different models but asked us to explicitly link them to particular staff. Their responses indicated recognition but also a level of ambivalence or discomfort.

- Our analysis of the interview indicated that the processual model lacked a strongly social component that we found in the other two. However, during the focus group, the relevant staff member averred that there was "generally cake flying around", suggesting that there was a social aspect to their volunteer management which was absent in the interview challenged some of our characterisation by emphasising time spent with volunteers having tea and cake (i.e. time spent building and sustaining relationships). This was absent from their empathy map interview.
- The staff member linked to the layered model read the original descriptor as a value judgement on their approach and not reflecting their leadership style (which was not intended). This generated some talk about how we were capturing a management style not a leadership style and how their role also involved managing relationships between volunteers and other groups of staff.

The discussion of the 'layered model' worked as a useful stepping point to a discussion of our second question, "Does it matter if you work with volunteers in different ways?". The focus group developed a consensus that their different ways of working were a natural consequence of the fact that each team had different roles and activities that necessarily involved the volunteers interacting with staff in different ways. They also felt that their work attracted volunteers with different personalities, which they also needed to respond to. Ostensibly, it is 'okay' that each team manages volunteers differently. When asked if there was anything that they needed to have in common, the response was a rapid, strongly asserted, "Yes". The common features were respect; kindness, welcome, appreciation and a sense that everyone was contributing towards TAP's organisational purpose.

We moved from the discussion of difference to the possibility of 'crosstalk' – volunteers from different teams comparing notes and observing differences in how they were managed. The possibility of crosstalk was recognised, along with the possibility of some volunteers moving between teams (which had not been mentioned in the interviews). However, the staff emphasised crosstalk arising from volunteers who give time to multiple organisations and who compare notes on how they are treated at each (e.g. another heritage organisation in the region covers volunteers' travel costs) – this was seen as bearing both positive and negative consequences.

The volunteer manager also reflected that the focus group itself provided an opportunity for the team leads to get together and discuss practices. This had been a practice pre-Covid which had fallen by the wayside.

Conclusion

Methodological conclusions

The empathy map provided a valuable frame for talking with the volunteer supervisors. The interview with the HR manager largely relied on them drawing on their past experience with volunteers and the conversation strayed into strategic issues. The strategic content was valuable in helping to situate volunteers within the broader work and goals of the organisation. However, this discussion indicated that for interviews with senior management we would need to develop strategies to help manage their lack of direct experience with volunteers.

The proposed project also frames staff as carriers of organisational practices as they move from one organisation to another. To achieve that, we would need to understand interviewees' career histories better. The empathy map alone did was not successful in drawing this information out of participants in sufficient detail. Therefore, an additional set of questions are needed before the empathy mapping exercise.

The focus group worked but revealed issues around anonymity and need to be addressed in the consent process. Relationship dynamics are a feature of focus groups, and we need to pay attention to these particularly if we are deliberately drawing out differences between teams and individuals. The framing of this activity – looking for difference but without applying a value judgement to that difference – needs to be done with care.

Emergent findings

The team leads manage their volunteers in different ways, which we characterised as integral, processual and layered.

The interactions between the team leads and their volunteers had different characteristics, with the 'integral' and 'layered' leads indicating that there was more mutual care between leads and volunteers. We hypothesised that this, in part, is because these staff are younger women and therefore evoke a certain set of behaviours from the older, female volunteers.

Difference in how volunteers were thought of and managed was seen as being acceptable even necessary. It reflects differences in the nature of the volunteering activity in each team, how they work with the staff and the personalities of their volunteers.

Despite different practices, common values (shared between the staff) were seen as being important to the way staff worked and the volunteers' experiences.

The findings from this pilot support the basic contention of our proposed project – that the values of staff from across an organisation are crucial for successful volunteer involvement in hybrid (cultural)

organisations. They suggest that a greater understanding of these common values through additional research can transform organisational practices around volunteer management leading to a more sustainable organisational practice.

Appendix 1 – Coding Tree based on analysis of empathy map interviews

Name	Files	No. Ref
Adjectives	4	88
(Life) experience	1	2
Adventurous	1	1
Amazing	1	1
Capable	1	4
Caring	1	2
Cold (initially)	1	1
Committed	1	1
Cool	1	1
Direct	1	2
Enthusiastic	1	6
Ethical	1	2
Experienced	1	2
Happy	1	1
Hard to manage	1	1
Hardy	1	2
Headstrong	1	1
Intelligent	1	1
Like structure	1	1
Local	3	7
Love of gardening	1	1
Loves archaeology and history	2	5
Loves children	2	2
Loves learning	1	1
Loves the Chapel	1	4
Maturity	1	1
Mellowed	1	1
Nosy	1	1
Old school	1	2
Passionate	4	5
Pride in volunteering	1	1

Name = name of the code given by Davenport to a selected piece, or pieces, of transcript.

Files = the number of files (i.e. interview transcripts) where that code was used.

References = the total number of times that code was used, across all files.

Codes are indented when they have been set as sub-codes within a "parent" code (which is not indented). The number of files and references for the parent code are aggregated from all the sub-codes. For example, '(Life) experiences' is a sub-code to 'Adjectives'.

Proud (self-reliant)	1	2
Reliable	1	3
Scary (initially)	1	2
Skilled	1	2
Slightly terrifying	1	1
Social	1	1
Strong character	1	6
Stubborn	1	1
Suspicious (initially)	1	2
Trustworthy	1	2
Well-travelled	1	2
Willing to try new things	1	1
Attachment to museum spaces	1	3
Barriers	3	14
Health problems	1	2
Caring for volunteers	3	17
Challenge of retirement	1	1
CSR volunteering	1	1
De-teacher-ifying volunteers	1	3
Employment status	3	4
exemplar characteristics	4	43
Age	3	13
Gender	2	2
Fit between staff and volunteer roles	1	2
Gains	4	21
Appreciation	1	1
Being outdoors	1	1
Confidence	1	1
Esteem - rewarded	1	1
Friendship	2	3
Identity	2	2
It makes them happy	1	1
Keep mind active	1	1
Knowledge and skills	1	1
Making a difference	1	1

Satisfaction	1	1
Sharing interests	1	1
Social interaction	3	4
Transformation	1	1
Identifies individual volunteer	2	2
Length (time) of volunteering	2	7
Mining Art Gallery	2	3
Org history	1	1
Organisational purpose	3	9
TAP mission	2	2
Other volunteering	3	7
Ownership	2	4
Relationship between staff & volunteer	3	30
(Grand)maternal or paternal role	2	4
Who manages who?	2	6
Relationship between volunteer & org	3	4
Relationships between volunteers	2	7
Responses to change	3	5
Spanish Gallery	1	5
Support for volunteer	1	3
Surprised by volunteer	1	1
Tension between curators & volunteers	2	8
Tensions between (sub-groups of) volunteers	1	2
Us & them (Volunteers & staff)	1	4
Value added vs integral	3	5
Volunteer management challenges	4	22
Volunteer motivations	3	20
Volunteer role	4	33
Internal debate	3	6
Volunteers as front-line	2	3
Younger volunteers and careers	1	1