Expansive and transformative learning within volunteer training:

A multiple case study of three UK health and social care charities

A thesis submitted to the University of Manchester for the degree of PhD in the Faculty of Humanities

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# Table of Contents

List of Figures .................................................................................................................. 8

Abbreviations .................................................................................................................... 8

Abstract .............................................................................................................................. 9

Declaration .......................................................................................................................... 10

Copyright statement ......................................................................................................... 11

Acknowledgements .......................................................................................................... 12

1. Introduction .................................................................................................................... 13
   1.1 Research aims ........................................................................................................... 13
   1.2 Rationale and research questions ........................................................................... 15
   1.3 Theoretical perspective ........................................................................................... 17
   1.4 Thesis outline .......................................................................................................... 20

2. Conceptualisations of learning in volunteer training ..................................................... 23
   2.1 Introduction .............................................................................................................. 23
   2.2 Volunteers in health and social care ....................................................................... 24
   2.3 Volunteer training .................................................................................................... 25
   2.4 Summary .................................................................................................................. 31

3. Cultural-Historical Activity Theory (CHAT) ................................................................. 32
   3.1 Introduction .............................................................................................................. 32
   3.2 Historical development of CHAT .......................................................................... 33
   3.3 Mediation through artefacts .................................................................................... 34
   3.4 Historical development: The object of activity ....................................................... 39
   3.5 Practical activity ...................................................................................................... 46
   3.6 Summary .................................................................................................................. 51


<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Conceptualisations of learning in CHAT</td>
</tr>
<tr>
<td>4.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>4.2</td>
<td>Expansive learning and Transformative Activist Stance (TAS)</td>
</tr>
<tr>
<td>4.3</td>
<td>Transformation</td>
</tr>
<tr>
<td>4.4</td>
<td>Contradictions</td>
</tr>
<tr>
<td>4.5</td>
<td>Agency</td>
</tr>
<tr>
<td>4.6</td>
<td>Summary</td>
</tr>
<tr>
<td>5.</td>
<td>Theoretical Framework</td>
</tr>
<tr>
<td>5.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>5.2</td>
<td>Activity</td>
</tr>
<tr>
<td>5.2.1</td>
<td>Activity system</td>
</tr>
<tr>
<td>5.2.2</td>
<td>Object</td>
</tr>
<tr>
<td>5.2.3</td>
<td>Values</td>
</tr>
<tr>
<td>5.2.4</td>
<td>Subjects within activity</td>
</tr>
<tr>
<td>5.2.5</td>
<td>Practices</td>
</tr>
<tr>
<td>5.3</td>
<td>Transformation</td>
</tr>
<tr>
<td>5.3.1</td>
<td>Individual and collective transformation</td>
</tr>
<tr>
<td>5.3.2</td>
<td>Expansive learning</td>
</tr>
<tr>
<td>5.4</td>
<td>Summary</td>
</tr>
<tr>
<td>6.</td>
<td>Methodology</td>
</tr>
<tr>
<td>6.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>6.2</td>
<td>Multiple case study</td>
</tr>
<tr>
<td>6.3</td>
<td>Defining the cases</td>
</tr>
<tr>
<td>6.4</td>
<td>Sample</td>
</tr>
<tr>
<td>6.4.1</td>
<td>Cases</td>
</tr>
<tr>
<td>6.4.2</td>
<td>Research participants</td>
</tr>
<tr>
<td>6.5</td>
<td>Access to the research sites</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
</tr>
<tr>
<td>6.6</td>
<td>Methods of data generation</td>
</tr>
<tr>
<td>6.6.1</td>
<td>Experiencing</td>
</tr>
<tr>
<td>6.6.2</td>
<td>Enquiring</td>
</tr>
<tr>
<td>6.6.3</td>
<td>Examining</td>
</tr>
<tr>
<td>6.7</td>
<td>Data Management</td>
</tr>
<tr>
<td>6.8</td>
<td>Preliminary studies</td>
</tr>
<tr>
<td>6.9</td>
<td>Ethical considerations</td>
</tr>
<tr>
<td>6.10</td>
<td>Summary</td>
</tr>
<tr>
<td>7.</td>
<td>Analysis and interpretation</td>
</tr>
<tr>
<td>7.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>7.2</td>
<td>Approach to data analysis</td>
</tr>
<tr>
<td>7.3</td>
<td>New ideas and explanations</td>
</tr>
<tr>
<td>7.4</td>
<td>Viewing new ideas through the theoretical framework</td>
</tr>
<tr>
<td>7.5</td>
<td>Developing themes</td>
</tr>
<tr>
<td>7.6</td>
<td>Within-case analysis</td>
</tr>
<tr>
<td>7.7</td>
<td>Cross-case analysis</td>
</tr>
<tr>
<td>7.8</td>
<td>Summary</td>
</tr>
<tr>
<td>8.</td>
<td>Case Studies</td>
</tr>
<tr>
<td>8.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>8.2</td>
<td>Case 1: ‘it’s there in every one of us’</td>
</tr>
<tr>
<td>8.2.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>8.2.2</td>
<td>History and Culture</td>
</tr>
<tr>
<td>8.2.3</td>
<td>Ambassador training</td>
</tr>
<tr>
<td>8.2.4</td>
<td>Vignette: Greg</td>
</tr>
<tr>
<td>8.2.5</td>
<td>Main Themes</td>
</tr>
<tr>
<td>8.2.6</td>
<td>Summary</td>
</tr>
<tr>
<td>8.3</td>
<td>Case 2: ‘it’s just that I feel really different’</td>
</tr>
</tbody>
</table>
8.3.1 Introduction

8.3.2 History and Culture

8.3.3 Helpline training

8.3.4 Vignette: Joni

8.3.5 Main Themes

8.3.6 Summary

8.4 Case 3: 'just using the terminology in everyday life'

8.4.1 Introduction

8.4.2 History and Culture

8.4.3 HIV update training

8.4.4 Vignette: Kayla

8.4.5 Main Themes

8.4.6 Summary

9. Synthesis of cases

9.1 Introduction

9.2 Common themes across all cases

9.2.1 Dynamic object of activity

9.2.2 Subjectivity: Position of volunteers towards the object of activity

9.2.3 Transformation within and beyond the system

9.3 Nuances between cases

9.3.1 The emotional connection to the object

9.3.2 The changing perspective of the object

9.3.3 Rules and values regulating the activity

9.4 Summary

10. Discussion

10.1 Introduction

10.2 The role of the charity environment
Appendix 1: Case study protocol .................................................................286
Appendix 2: List of research participants ....................................................287
Appendix 3: Focus group emails .................................................................289
Appendix 4: Research journal .................................................................290
Appendix 5: Focus group schedule ............................................................294
Appendix 6: Interview protocol for volunteers ..........................................296
Appendix 7: Interview protocol for charity staff ........................................297
Appendix 8: Document authenticity ..........................................................298
Appendix 9: Data in Nvivo ....................................................................299
Appendix 10: Research dissemination and training ....................................300
Appendix 11: Participant Information and Consent Sheets ......................302
Appendix 12: Annotating the data in Nvivo ..............................................312
Appendix 13: Coded data within context in Nvivo ....................................313
Appendix 14: Coding scheme .................................................................314
Appendix 15: Coding memo .................................................................315
Appendix 16: Interrogating the data using the Nvivo matrix tool ..............316
Appendix 17: Report of findings ..............................................................317
Appendix 18: Matrix in cross-case analysis ..............................................321
Appendix 19: Data generation timetable .................................................322
Appendix 20: Visual display of data for each case ....................................324

Final word count: 87,504
List of Figures

Figure 1. Stimulus-response process (Vygotsky, 1978, p.27) ....................... 35

Figure 2. The Activity Theory Triangle Model (from Mwanza and Engeström, 2005, p.458) .................................................................................................................. 49

Figure 3. Two interacting activity systems as minimal model for the third generation of activity theory (Engeström, 2001, p.136) ................................................................. 50

Figure 4. The expansive learning cycle (from Engeström and Sannino, 2010, p.8) ................................................................. 55

Abbreviations

CHAT  Cultural-Historical Activity Theory
CS1 Case study 1
CS2 Case study 2
CS3 Case study 3
HIV Human Immunodeficiency Virus
TAS Transformative Activist Stance
Abstract

Sarah Darley, July 2016
The University of Manchester, PhD, Faculty of Humanities

Title: Expansive and transformative learning within volunteer training: A multiple case study of three UK health and social care charities

This research explores the learning of volunteers who are being trained to perform service-providing roles within UK health and social care charities. Within these charities, volunteers often perform complex roles in dynamic environments, supporting service users and addressing challenging causes. This thesis argues that the charity and voluntary environment offers certain affordances, and also constraints, that provide opportunities for transformative learning experiences. The limited previous studies on the learning of volunteers have tended to concentrate on training evaluations or informal learning 'on the job', resulting in an unhelpful formal/informal dichotomised approach to learning. The research proposes that this approach has been unable to offer a detailed insight into the learning experienced by volunteers within the training process. In particular, this dichotomised view has been unable to account for both the learning of scientific concepts, such as the specific health conditions these charities are addressing, and everyday experiences of both volunteers and service users that are integral to the learning process.

To address this gap, the thesis draws upon Cultural-Historical Activity Theory (CHAT), which is an approach grounded in Hegelian dialectics. Specifically, the CHAT-informed theories of expansive learning (Engeström, 1987) and Transformative Activist Stance (TAS) (Stetsenko, 2008) are synthesised to examine how volunteers interact with and within the charity environment through practices of training. Through this perspective, learning is conceptualised as a form of individual and social transformation, which expands the possibilities for collective activity. Expansive learning and TAS have previously been drawn upon to provide insight into learning in the workplace and in projects of social change respectively. However, so far the theories have not been focused on learning within the charity and voluntary environment.

A multiple case study of three health and social care charities based in North West England provides the empirical data for the research. Each charity addresses a complex health and social cause, including stroke, sexual violence and HIV, and relies on volunteers to help provide services. Multiple qualitative methods, including observations of training, charity staff interviews, along with interviews and focus groups with volunteers, allow a range of perspectives and positions to be taken into account in line with the epistemology of the study. Data are analysed through the process of abduction drawing upon a CHAT-informed theoretical framework.

The thesis intends to contribute to knowledge in two main areas. Firstly, it aims to increase understanding of learning within volunteer training, including how learning in the charity environment can be supported, sustained and made meaningful to enable transformative experiences. Secondly, it aims to theoretically advance CHAT, and the charity and voluntary environment is presented as a fruitful setting for developing particular aspects of the theory, such as emotion and agency.
Declaration

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Last but definitely not least, huge thanks to my family and friends. Thanks in particular to my wonderful Mum and Dad and I am hugely grateful to my Mum for her time and effort proofreading.

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1. Introduction

1.1 Research aims

The aim of this thesis is to examine the role of the charity environment on the learning of volunteers, and it specifically aims to explore how their position within a charity, as well as their personal histories, interacts with this environment through the practices of training. Following an approach grounded in Cultural-Historical Activity Theory (CHAT) such interaction is conceptualised as a form of expansive (Engeström, 1987) and transformative (Stetsenko, 2008) learning. CHAT is the underpinning theory of this thesis and will be explained in detail in Chapter 3, but briefly defined, CHAT is ‘an interdisciplinary approach to studying human learning and development’ (Cole, 2010, p.360), which views all human development as ‘an essentially sociocultural and tool-mediated process’ (Stetsenko, 2004, p.505). CHAT is rooted in Hegelian dialectics, which aim to capture the ‘real, inner dynamic of some phenomenon of change’; for example, the phenomenon of learning (Roth, 2012, p.262). This chapter sets out the aim of and background to the research, the research problem and rationale, and the theoretical perspective underpinning the study. The research questions of this study, which are informed by this perspective, will be presented and an outline of how the thesis is structured to answer them is provided.

The initial idea for this thesis originated from my own experience of working and volunteering within the charity and voluntary sector, and also from my experience and interest in adult learning. In particular, the training I participated in at a number of charities as a volunteer felt personally transformational as, just like Rebekah from my second case study described, it provided an opportunity to learn about important societal issues I had not had the opportunity to learn about in other areas of my life. Despite the powerful effect this training had for me and for my fellow volunteers, there appeared to be a lack of research into this area of learning within either the volunteering or educational literature.
During the year before beginning my PhD I studied for an MSc in Educational Research where I had the opportunity to: read further into volunteering literature; become familiar with and deepen my understanding of CHAT; test out research designs, methods and analyses; make contacts and talk to researchers, charity staff members and volunteers within my area of interest. My MSc dissertation took the form of a cross-sectional survey that generated data about volunteers and training within UK health and social care charities. These activities provided a grounding from which I was able to develop ideas and plans for my thesis and build up relationships with the charities that would later become my case studies.

Data generation for this thesis took place over the period of a year, through a multiple case study of three health and social care charities based in North West England. Multiple qualitative methods were conducted and data were analysed through the use of a CHAT-informed theoretical framework. The sample purposely selected charities where volunteers undertook training in order to perform service-providing roles addressing complex and challenging health and social causes. Health and social care charities were specifically selected, firstly because of their focus on these complex causes, which formed the object of learning for volunteers, and secondly due to the increasing interest and support for volunteering in this sector (Morris et al., 2015).

Findings from this thesis aim to propose a new understanding of learning within volunteer training in UK charities. Learning is conceptualised as a dialectical process between the volunteers and charity, and training as a practice that mediates this ongoing and dynamic process of learning. Specifically, the thesis aims to make a substantive contribution to literature on volunteering by explaining how the charity environment can offer meaningful and transformational experiences of learning for volunteers. It also aims to make a theoretical contribution to the CHAT literature by focusing on underexplored aspects of CHAT, such as emotion and agency, in a context where these aspects are integral to learning.
1.2 Rationale and research questions

To date, there are few studies that explore the learning of volunteers within the charity and voluntary environment, and this thesis follows the perspective of previous CHAT studies, which have aimed to show that ‘every kind of work requires complex thinking, problem solving, and learning’ (Engeström and Glăveanu, 2012, p.151). In this study, I also aim to address the challenge to ‘conventional theoretical assumptions about learning and knowing’, outlined by Lave (2012, p.161), particularly the assumption that learning is ‘only ever produced as a result of typical bureaucratic, institutional arrangements and trajectories of schooling’.

The thesis argues that the charity and voluntary environment offers particular aspects that afford opportunities for meaningful learning, including working towards complex societal challenges and the voluntary position of volunteers. Three charities were purposely chosen as typical case studies to highlight these aspects and each case addresses a complex health and social challenge, including stroke, sexual violence and HIV. CHAT is presented as a relevant theoretical perspective to further the understanding of learning in this environment, but at the same time it will be argued that this environment also offers an opportunity to further develop particular aspects of this theory, such as emotion and agency.

Unpaid work is a multifaceted phenomenon (Jegermalm and Grassman, 2013), but as the charity environment is of particular interest to this study, I decided to focus on formal volunteering which is defined as taking place within an organisation (United Nations, 2003). Volunteering is defined in this study as freely giving unpaid help as part of an organisation to benefit others (DCLG, 2010). Volunteer motivation is a widely researched area (Wilson, 2012) however there has been limited research into the learning and training of volunteers, even though learning is a recognised outcome of volunteering (e.g. Rossing, 1988; Schugurensky and Mündel, 2005; Mündel and Schugurensky, 2008; CEV, 2006; Ockenden, 2007). More specifically, in UK health and
social care charities, training is often a requirement for the three million people who regularly volunteer to provide services within these charities (Naylor et al., 2013), particularly when working with children and vulnerable adults (Evans, 2011).

The limited previous studies on the learning of volunteers have tended to concentrate on training evaluations or informal learning ‘on the job’, resulting in an unhelpful formal/informal dichotomy of learning, recognised in educational research as knowledge acquisition versus participation in practices (Sfard, 1998). Neither approach has been able to offer a detailed insight into the learning experienced by volunteers within the training process. Furthermore, these approaches have done little to problematise the actual concepts of knowledge and learning within the charity environment. This thesis argues that an instrumental, individualised view of learning in which volunteers simply acquire static knowledge and skills from the charity organisation they are training within is limited and is particularly unsuited to examining learning in a volunteer and charity context. At the same time, purely looking at informal learning within the role is also insufficient, as the scientific or abstract knowledge involved in these challenges, such as what is HIV or a stroke and how it affects the body, or what are the psychological effects of sexual violence, need to be taught and learned systematically through instruction (e.g. Vygotsky, 1987).

The focus of this thesis is learning and it is beyond the scope of the study to address political aspects of volunteering within charities providing services (see Milbourne and Cushman, 2015). However, the context within which the research evolved and took place is an important consideration in situating the findings, particularly through the perspective of a cultural-historical theoretical framework. The initial idea for this thesis was conceived in 2011, at a time of an economic downturn and huge changes to the UK health and social care sector. These changes included the largest restructuring of the National Health Service (NHS) in its history (South, White and Gamsu, 2012), large funding cuts to the charity sector and increased commissioning of public services (Kane and Allen, 2011), which threatened the ‘distinctive value base’ of charity and
voluntary organisations (Nevile, 2010, p.531). At the same time, the coalition government was promoting volunteering according to the Conservative Party’s Big Society agenda, which was criticised for assuming an unlimited supply of willing volunteers and for a lack of recognition for the training and support required by volunteers (Evans, 2011). More recently, there has also been a perceived threat to the campaigning and advocacy activities of UK charities by government policies, such as the UK Transparency of Lobbying, Non-Party Campaigning and Trade Union Administration Act 2014 which has been criticised for restricting the freedom of charities to engage in political debate (Morris, 2016). This dynamic environment creates the possibility of, and even necessity for, the production of new forms of work and practices, which make it a fruitful setting for a study underpinned by CHAT.

The study aims to address the following research questions, which are informed by the theoretical perspective of CHAT:

RQ1. What is the role of the charity environment on the process of learning for volunteers being trained for service-providing roles?

RQ2. In what ways can this learning process be described as transformational?

The following section provides an introduction to CHAT, which will be explained in further detail in Chapter 2.

1.3 Theoretical perspective

Cultural-Historical Activity Theory (CHAT) is drawn upon in this thesis in order to move beyond the dichotomous approach of knowledge acquisition versus participation in practices, and informal versus formal knowledge within volunteer training. The dialectical roots of this theory, influenced by Hegel, are a key tool in challenging and overcoming unhelpful dichotomies in order to explain learning. Dialectics also allows exploration into the mutual, ongoing interaction between the charity environment and
the volunteers. The thesis positions the concept of knowledge as a process to be ‘performed and enacted’ (Stetsenko and Arievitch, 2004a, p.68) and thus a dialectical entity, encompassing components previously considered to be separate, such as formal and informal knowledge, and previous and new knowledge (Roth, 2012). The movement and contradictions involved in this dialectical entity is conceptualised as the process of learning, which is manifested in transformation. In this study, the CHAT-informed learning theories of expansive learning (Engeström, 1987) and Transformative Activist Stance (TAS) (Stetsenko, 2008) are drawn upon to explore and examine this concept of learning as transformation across three case studies.

Expansive learning is described as focusing less on ‘vertical learning’ where learners gain competence through established practices and measures, and more on ‘horizontal learning’ where new knowledge and practices are collaboratively negotiated and created (Engeström, 2001). For this reason, the theory has been developed primarily through studies of workplace learning, where organisations are conceptualised as dynamic activity systems: ‘People and organizations are all the time learning something that is not stable, not even defined or understood ahead of time’ (Engeström, 2001, p.137). This description could apply to the dynamic environment, or ‘activity systems’, of health and social care charities in which volunteers are ‘learning what is not yet there’ (Engeström and Sannino, 2010, p.2). However, currently there are few studies of expansive learning in this type of workplace. The first stage of expansive learning involves individuals, or subjects, questioning existing accepted practice within the system, which then expands into a collective movement (Engeström, 1999a). This description has parallels with the ‘inherent characteristics’ of volunteering and the charity sector, which include challenging the status quo and advocating for social action (Snyder and Omoto, 2008).

Expansive learning is theorised to occur when subjects within a system are confronted with contradictions. Such contradictions are rife in workplaces and organisations (Engeström and Glâveanu, 2012), including, as this thesis will argue, charitable
organisations. Charities are dependent on volunteers (Taylor, Mallinson and Bloch, 2008) who give up their time for free to work towards a shared objective, but also bring into the organisation a multitude of experiences, motivations and perspectives. It is also common in charities for volunteers to move between the fluid boundaries of service users, volunteers and staff. This multiplicity of voices and different positions creates the potential for contradictions that can be both destructive and expansive to the system. The concept of contradictions is explained further in Chapter 3.

While expansive learning is a useful theory to identify contradictions within an activity system and to trace a transformative process of learning, it has received some criticism. Firstly, the activity system, in which expansive learning is theorised to take place, has been criticised for ignoring the wider social structure, accepting ‘capitalist relations’ and therefore neglecting issues of power and agency (Avis, 2009). Secondly, the interventions that have formed the methodology for identifying contradictions and expansive learning have tended to concentrate on the transformation and outcome of the system, rather than the subjects themselves (Blunden, 2015).

In order to address these gaps, this thesis also draws upon TAS, which aims to explain how, through collaborative activity, people transform and gain knowledge about their social world while at the same time transforming and gaining knowledge about themselves (Stetsenko, 2014). Therefore, TAS specifically conceptualises knowledge as a transformative tool for learners to develop meaningful life pursuits, which they act on through collaborative activity and in this process change their world, gain knowledge and become themselves (Vianna and Stetsenko, 2011). Through the perspective of TAS, learning aims to embed knowledge in ‘real life practice’ and is conceptualised as a ‘deeply historical process imbued with human values and also linking the past, the present, and the future’ (Stetsenko and Arievitch, 2004a, p.71).

The uniqueness of the charity and voluntary sector and what distinguishes it from government and private sectors is its ‘values-expressive character’ (Jeavons, 1992). Therefore, the connection between knowledge and values is particularly relevant to
exploring learning within the volunteer and charity context. Researching within this context also aims to address the criticisms of a lack of empirical research in the development of TAS (Ritchie, 2008). The status of volunteers, conceptually and practically, will be a key differentiating factor to current research informed by expansive learning and TAS. How subjects are positioned, and how they position themselves, in the activity through a division of labour has a fundamental impact on possibilities for the use of artefacts (Daniels, 2007), as well as access to knowledge, participation in practices and, therefore, the potential for transformation.

Following this theoretical perspective the thesis explores the activity of volunteering and specifically examines the practices of training within this activity. The thesis follows the perspective that theory is ‘a living entity, not a frozen body of fixed propositions’ and, by focusing on new challenges, can be renewed and advanced (Engeström and Sannino, 2016, p.2).

### 1.4 Thesis outline

This chapter began by outlining the aim and rationale of the research and introduced the area of learning within volunteer training as under-researched and under-theorised. The tendency of previous studies to dichotomise learning into formal and informal, or knowledge acquisition or participation in practices was highlighted and the limitations of this approach were explained. The theoretical perspective of CHAT was then proposed as an approach to overcome such dichotomies, and two theories of learning informed by this perspective were introduced, including expansive learning and TAS. The remainder of this chapter presents the organisation of the following thesis chapters.

Chapter 2 provides a detailed outline of the research problem by critically analysing relevant literature concerning volunteer training and conceptualisations of learning within this context. The limitations of taking a dichotomised approach to learning within the voluntary and charity context are explored. In Chapter 3 previous workplace
learning and CHAT-informed studies are presented that support the need to draw upon a dialectical approach. CHAT as a theoretical perspective is outlined in further detail, concentrating on three main concepts as outlined by Cole (1996), which include mediation, historical development and practical activity. These concepts are explained and examined by drawing upon examples from volunteering literature, and CHAT is proposed as a useful lens to gain a deeper understanding of learning within the charity and voluntary environment. A summary of learning as conceptualised within CHAT is presented in Chapter 4, along with a synthesis of the two theories underpinning this study, which include expansive learning and TAS. Chapter 5 follows on from the CHAT conceptualisation of learning by outlining the theoretical framework that will be drawn upon to interpret the empirical findings of the study. This chapter clarifies and defines the main concepts, their relation to each other and how they will be drawn upon to situate the research study and interpret the research findings.

Chapter 6 justifies and explains the research design of the study, including the methodology of a multiple case study, sampling criteria and multiple qualitative methods. The selection of case studies is justified according to the research questions and theoretical perspective. My position as a researcher and as a volunteer will be discussed, including how this position enabled access to the cases and participants. The multiple research methods that generated data through instruments informed by the theoretical framework are explained and justified. This section also includes a discussion on ethical considerations, which are vital to any research study, but particularly important within the context of charities that are addressing complex and sensitive causes. Methods of data analysis are explained in Chapter 7, which involved within-case and cross-case analyses. The analytic approach of abduction is explained, which allowed a systematic interrogation of the data, as well as interpretation through the theoretical framework. Considerations of data reduction and rigor through coding are discussed, acknowledging the potential conflict of this analysis process with the theoretical framework and how this conflict was addressed.
Chapter 8 presents the findings from the within-case analysis for each charity. All three within-case analyses begin with a detailed description of the history and activity of the charity, and the position of volunteers within both this history and activity. A narrative description of one observed training session is presented, followed by a vignette of one volunteer, which encompasses the main themes from the within-case analysis. These main themes, which have been identified from the analysis process, are then discussed in detail, interpreted through the theoretical framework. Chapter 9 syntheses the findings from across all three cases by identifying common themes, as well as examining the nuances between each case. Chapter 10 presents a discussion of the findings from the study, relating them to wider literature on volunteering and CHAT, and addressing the research questions. The thesis concludes by outlining the contribution to knowledge and suggesting areas for future research to extend the research findings.

In summary, this thesis combines the CHAT-informed theories of expansive learning and TAS in order to understand how volunteers learn what is not yet there, in collaborative activity according to their values and imagined outcome, and through doing so are able to transform the world as well as themselves. Exploring the potential for both individual and social transformation aims to identify the meaningful learning experiences taking place within volunteer training in order to gain a better understanding and insight into how learning can be supported within this context. The research aims to contribute to volunteering literature by providing a new understanding of training and a more complex explanation of motivation in terms of learning. It is hoped that by exploring learning in this context a better understanding will be gained of learning as a whole process, which overcomes the informal versus formal, and participation versus acquisition dichotomies.

Researching into this context also provides an insight into how people are motivated to continue learning around challenging and often upsetting topics. Findings therefore intend to have broader applicability beyond the case studies and contribute to knowledge of how adults can actively contribute to their own learning and development.
and transform themselves as well as their environment. Furthermore, using data from three purposely selected case studies to operationalise the theoretical framework of TAS and expansive learning intends to create a new dialogue with CHAT, in a new context, both of which aim to contribute to further theoretical development. In particular, the context of the charity and voluntary environment aims to illuminate aspects of CHAT that have been recognised in the literature as requiring further development, such as emotion and agency.

2. Conceptualisations of learning in volunteer training

2.1 Introduction

The previous chapter provided an introduction and background to the study and set out the research questions it aimed to answer. This chapter outlines the problem that this thesis intended to address: the underexplored area of learning within the charity and voluntary environment, and the subsequent impact on conceptualisations of learning for volunteers training within UK charities. The studies that are critically analysed in this chapter reveal a dichotomised approach to learning, and this approach is foregrounded in debates within wider educational research. It is argued that a dichotomised approach can only provide a limited understanding of learning within this context, and particularly fails to address issues of motivation and transformation.

Literature that was critically analysed in this chapter and the following chapter was sourced from databases such as Scopus, ERIC, ASSIA and the British Education Index. Key terms for searching included ‘volunteer’, ‘training’, ‘charity’, and ‘activity theory’. The University library catalogue was searched to find relevant books, and websites such as the Department of Health were visited to access reports, policy documents and other grey literature. Further literature was identified through references within relevant books and articles, and followed up using Google Scholar. Searching was restricted to the last twenty years for empirical studies, with preference
given to the most recent publications. Studies on volunteering were included mainly from the UK, United States, Canada and Australia. CHAT literature was more widely searched for, drawing upon the most prominent authors in this area, including Vygotsky, Leontyev, Cole, Stetsenko and Engeström.

2.2 Volunteers in health and social care

This section provides a brief overview of volunteers within health and social care in the UK, and their distinct position within organisations. Volunteering was defined in Chapter 1 as freely giving unpaid help in order to benefit others, and whilst perhaps not as dominant an activity as paid work, volunteering is an activity in which a high number of adults participate every year. The 2014/15 Community Life Survey indicated that 14.2 million people in the UK formally volunteer at least once a month and that 16% volunteer within a health, disability or social welfare organisation (NCVO, 2016). The International Classification of Nonprofit Organisations (ICNPO) defines these organisations as those that engage in health related activities and that provide human and social services to a community or target population (Salamon and Anheier, 1996). Often these communities include vulnerable individuals, defined as someone:

[W]ho is or may be in need of community care services by reason of mental or other disability, age or illness; and who is or may be unable to take care of him or herself, or unable to protect him or herself against significant harm or exploitation. (DH, 2000, p.9)

There is increasing interest and support for volunteering in this sector (Morris et al., 2015), which is reflected in the Department of Health strategic vision for volunteering (DH, 2011) and the Health and Social Care Volunteering Fund (DH, 2015) for projects supporting volunteer-led services. Volunteers are considered to provide a unique contribution to improving patient experiences, building closer relationships between services and communities and supporting integrated care (Naylor et al., 2013). Furthermore, previous studies have shown that volunteers are particularly valued by
service users due to the voluntary nature of their role, as opposed to staff who are being paid to support them (e.g. Taggart, Short and Barclay, 2000).

Volunteers are positioned differently within the system of an organisation to paid workers and the relationship and possible conflicts between these two different ‘workers’ have been previously discussed in volunteering literature (e.g. Hwang and Powell, 2009; Kreutzer and Jäger, 2011). For example, Andreassen, Breit and Legard (2014) describe the professionalisation of ‘the roles and tasks of amateurs and volunteers, not through formal education, but via self-governed educative work of voluntary organizations.’ Through their study of service users being trained to become representatives in Norwegian health and social care services, the authors explain this kind of professionalisation as leading to the development of volunteers as ‘professional amateurs’. This kind of professionalisation requires a balance, and involves possible tensions, between formalised training and the authenticity of personal experiences, or ‘experiential knowledge’ (ibid., p.335).

The position of volunteers will give rise to different motives, tools and learning experiences to that of paid staff. In this context, training is often seen as a reward for the activity of volunteering itself and training has been cited as one of the reasons why volunteers continue to volunteer (Hidalgo and Moreno, 2009; Tang, Choi and Morrow-Howell, 2010; O'Higgins, 2013). This chapter therefore aims to position the activity of volunteering, and the practices of training within it, as an important substantive area of learning to explore with the potential for theoretical advancement. The next section examines these practices of training in further detail.

2.3 Volunteer training

This chapter has so far introduced the unique position of volunteers within the area of UK health and social care. This section examines the practices of and justification for training within this area.
Charities and other voluntary groups working in the area of health and social care have a long history and tradition of dealing with complex societal challenges. For example, the unique role of volunteers in voluntary and community groups was instrumental in addressing the first cases of HIV and AIDS in the United States (Chambré, 1991), and women volunteers in UK Rape Crisis centres have come together to support survivors of sexual violence since the 1970s (Rath, 2008). In particular, the UK voluntary sector is seen as having a long history of ‘providing humanitarian social welfare’ (Milbourne, 2013, p.23).

Dealing with such complex issues and supporting vulnerable populations means that training is often a mandatory part of the volunteer process within charities. This is particularly important for volunteers providing services in the area of health and social care, who need to learn about ‘emotionally laden topics’ that are often linked to wider stigmatising practices (Hutchinson and Quartaro, 1993, p.93). It has even been argued that without training volunteers might do more harm than good (Siu and Whyte, 2009). Furthermore, providing both initial and ongoing training is seen as helpful in creating an inclusive volunteer programme (Rochester, Payne and Howlett, 2010), which could address a recognised lack of diversity among volunteers in the UK (Mohan, 2011), particularly in service delivery where ‘more affluent communities have a larger pool of volunteers to draw upon’ (Ockenden, Hill and Stuart, 2012, p.157).

The complex societal challenges health and social care charities focus on cannot be addressed by individuals alone and require a collaborative response (Edwards, 2009), however, the limited studies on volunteer training around such concerns have tended to conceptualise learning as an individual process. This conceptualisation follows the view that volunteering is an ‘individual behavior’, which neglects the organisational and institutional context of volunteering (Hustinx, Handy and Cnaan, 2010, p.74). These studies have taken either a cognitive approach, concentrating on training evaluations of tasks, or a situated approach, concentrating on informal learning ‘on the job’.

Engeström (1995, p.411) argues that analysing learning through these separate
approaches cannot account for the motivation for and future possibilities of the activity, which are vital considerations when ‘faced with societal change and institutional contradictions’.

This problematic dichotomy permeates through wider educational research, which Sfard (1998) describes as the acquisition versus participation metaphor. The acquisition metaphor describes learning as knowledge acquisition which, once acquired, can then be applied and transferred to different contexts (*ibid*.). Where there is a clear end point to learning in this metaphor, in the participation metaphor, learning is described as an ongoing process, never separated from the context within which it is taking place (*ibid*.). This chapter follows the argument from Engeström and Sannino (2010, p.2) that this distinction is a false dichotomy and that both approaches, ‘depict learning primarily as one-way movement from incompetence to competence, with little serious analysis devoted to horizontal movement and hybridization’.

The acquisition metaphor can be identified in evaluation studies of volunteer training, which focus primarily on improved competence. For example, in a UK study, Rayner and Marshall (2003) evaluated the performance of six volunteers supporting people with aphasia. Aphasia is a communication condition caused by damage to the brain (Stroke Association, 2015). The study evaluated whether the performance of aphasic participants, supported by volunteers, improved after volunteers undertook training. Evaluation methods in this study included a repeated measures questionnaire and a conversation rating scale: quantitative methods that indicate how learning was conceptualised in this study as a static outcome that can be counted at the end of a period of training. Initially the results showed significant improvements in both the questionnaire scores and conversation ratings, however competence declined over time, which was unexplained by the study (Rayner and Marshall, 2003). Similar recent evaluative studies include the training of volunteers to: provide mealtime assistance to older inpatients in a UK hospital (Roberts *et al*., 2014), and to promote better health among older Chinese immigrants in New York City (Mui *et al*., 2012).
The focus on improved competence aligns with ‘the idea of learning as gaining possession over some commodity’ (Sfard, 1998, p.6) and neglects the context within which the training takes place. This focus also positions volunteers as passive learners rather than a source of new ideas (Haigh, 2007) and leaves unexplored the wider benefits of training for them and the organisation. The acquisition metaphor has also been described in critical pedagogy as ‘banking’ where students are filled like containers with knowledge ‘deposited’ from a teacher (Freire, 1970). Engeström and Sannino (2012, p.46) go further in arguing that ‘the very assumption of complete instructional control over learning is a fallacy’ and that there is always a gap between intended instruction and the learning process. However, the authors argue that it is this gap, and the struggle and negotiation that is implied in efforts to close it, that provide the resources for ‘understanding the processes of learning as processes of formation of agency’ (ibid.).

The previously discussed evaluative studies also assume that there is a set outcome to be achieved. However, charities are training volunteers to carry out roles in which the exact outcome is unclear and in an environment that is continually changing. Volunteering itself is a dynamic phenomenon, shaped by social and cultural forces (Chambré, 1991), including ‘demographic, economic, social, cultural and political change’ (Rochester et al., 2010, p.80). A similar dynamic situation has been described as being ignored in educational institutions, where students are prepared for set jobs and expected to adapt to existing social structures, rather than being encouraged to transform these structures (Vianna, Hougaard and Stetsenko, 2014). UK government policies have also tended to assume that learning is a transferable outcome and have focused on volunteering as a way of gaining job-related skills and improved employability (Ellis Paine, McKay and Moro, 2013). This assumption has been reflected in initiatives such as Work Together, which encouraged ‘all unemployed people to consider volunteering as a way of improving their employment prospects while they are
looking for work’ (DWP, 2012). The evidence for such outcomes has been disputed in recent studies (Ellis Paine et al., 2013; Kamerāde and Ellis Paine, 2014).

The participation metaphor can be identified in more recent studies of volunteer learning, such as the Canadian-based case studies by Duguid, Mündel, and Schugurensky (2013). These case studies aim to explore the ‘learning that results from the volunteer experience’ (ibid., p.24). Duguid et al. (2013) claim that informal learning is the predominant way in which volunteers learn, reflecting the suspicion towards ‘the formation of theoretical concepts’ that Engeström and Sannino (2010, p.2) identify with this approach. Informal learning is defined as, ‘learning that is not acquired through the formal and non-formal educational systems’ (Schugurensky, 2013, p.6) and where there is no reliance on a teacher or curriculum (Duguid et al., 2013). This latter point has been disputed by workplace learning researchers such as Billet who argues against the idea that learning experiences in workplaces have no structure or organisation:

They are formalised and structured by the goals, activities and culture of the work practice (Brown et al., 1989), just as learners’ experiences in educational institutions are structured by those institutions’ practices. (Billet, 2002, p.460) It can also be argued that scientific knowledge, such as what is HIV, what is a stroke, and how they affect the body, is developed from ‘above,’ in institutions and not ‘from ‘below,’ in the ‘everyday experience of having to survive in the world’ (Rowlands, 2000, p.562). Furthermore, separating learning into classificatory categories such as ‘informal’ and ‘formal’ is problematic because both can be present at once (Wenger, 1998). For example, within a ‘formal’ training session a volunteer might be learning knowledge from the trainer while at the same time learning ‘informally’ about the more hidden rules and norms of the charity. Trainers themselves may also be ‘informally’ learning from the volunteers. Billet (2002, p.460) argues that guided learning is necessary even within ‘informal’ learning due to the ‘social genesis’ of knowledge, and that complex understandings and procedures evolved through practice are ‘unlikely to be learnt through discovery alone’. Learning is, therefore, more complex than ‘gaining
competence in relatively stable practices' and 'not well explained by mere participation and gradual acquisition of mastery' (Engeström, 2001, p.142). So while participation in work practices can provide an opportunity for learning, some level of guidance is necessary to support this learning to take place.

The conclusion that Sfard (1998) draws through her exploration of the acquisition and participation metaphors is that both offer an insight into learning that the other on their own cannot provide. This conclusion has also been acknowledged by educational researchers, particularly those researching learning in the workplace. For example, Billet (2002, p.469) agrees: 'everyday participation without guided learning, and vice versa, may be limiting.' Wenger (1998, p.68-9) goes further in arguing that dichotomies such as formal and informal learning only focus on 'surface features rather than on fundamental processes.' He goes on to claim that instead of separating 'types' of learning, more insight will be gained in understanding the interplay between them (ibid.).

In a study of science learning in and outside school classrooms, Roth (2012) demonstrates how the separation of ‘types’ of learning can be overcome by drawing upon a dialectical approach. Dialectics enables analysis to go beyond mutually exclusive pairs, such as subject-object and individual-social, and theorises the opposites ‘as nonidentical expressions of the same category’ (Roth and Lee, 2007, p.195). Roth and Lee (2007, p.196) use the example of a thread that is made up of different strands of fiber to explain a dialectical relationship, where ‘any part that one might heuristically isolate within a unit presupposes all other parts’:

In the particular contexts that a dialectical orientation attempts to explain, therefore, the specific function of individual components cannot be understood decoupled from the function of other parts and the function of the whole. Looking at a fiber, we cannot know what it does unless we look at its place within a larger system and at its relations with everything else. (Roth and Lee, 2007, p.196)

A dialectical approach to knowledge allows for emergence and change, rather than stasis (Roth, 2012), which may be particularly useful in overcoming the separation
between ‘formal’ volunteer training and volunteers learning ‘on the job’. Therefore, rather than a phenomenon in itself, knowledge becomes ‘a manifestation of inherent and unavoidable change and learning’ (ibid., p.274).

By drawing upon a dialectical approach, this thesis intends to further this line of argument within the context of volunteer training. Therefore, in my study in order to increase understanding of learning within volunteer training, the interplay between organised training sessions and ongoing, unorganised learning will need to be explored, as well as the gap that Engeström and Sannino (2012) describe between instruction and learning.

2.4 Summary

This chapter has so far presented the research problem addressed in this thesis, which is the underexplored area of learning in the charity and voluntary environment, specifically within volunteer training. After providing a short overview of volunteers within health and social care in the UK, the chapter moved into the specific area of training. The importance of training volunteers within health and social care charities was discussed, however it was argued that this area is under-researched and under-theorised. A dichotomised view of learning was identified in previous studies on volunteer training that have concentrated on evaluations of tasks or informal learning ‘on the job’. The limitations of this approach were discussed, particularly in regard to the charity and voluntary context.

The next chapter will examine the potential of Cultural-Historical Activity Theory (CHAT) to overcome the dichotomous approach of acquisition versus participation within the context of volunteer training. CHAT is based in the historical-dialectic tradition of Hegel and Marx (Roth, Radford and LaCroix, 2012), which emphasises change rather than stasis (Roth, 2012). Drawing upon this perspective intends to overcome the rather narrow existing view of training, which has been outlined in this
section and which has also been highlighted in the wider literature on adult education (Holst, 2009). It is proposed that drawing upon CHAT in this study will enable a deeper understanding into the processes of learning within volunteer training, motivation to learn, and how such learning can become transformational. Through this perspective, transformation does not refer to a linear movement from one static state to another, but rather it involves an ongoing, dynamic process of change, for both learners and their environment.

3. Cultural-Historical Activity Theory (CHAT)

3.1 Introduction

Research in the cultural-historical tradition intends to understand the influence of social practices on human development (Hedegaard, Chaiklin and Jensen, 1999). This thesis concerns the activity of volunteering within health and social care charities, particularly looking at the practices of training, and how volunteers both contribute to and learn through these practices. Drawing upon the concept of activity within the cultural-historical tradition aims to identity aspects within the charity and voluntary environment that can provide conditions for learning and development. This chapter begins by explaining the development of CHAT and its underlying aims and intentions, in order to show its relevance to the context of the charity and voluntary sector. The section will go on to discuss three main concepts of CHAT as outlined by Cole (1996), which include mediation, historical development and practical activity. Each concept will be discussed, drawing upon examples from the volunteering literature, to put forward the argument that CHAT provides a useful lens that enables a deeper understanding of learning and the potential for transformation within the charity and voluntary environment.
3.2 Historical development of CHAT

CHAT emerged and has been developed through periods of social change: originally in 1920s Soviet Russia (Gielen and Jeshmaridian, 1999) and later during the European student movement of the 1960s (Sannino, Daniels and Gutiérrez, 2009). The initial development of CHAT was inspired by the ideas and work of Marx. This influence can be seen to a greater or lesser extent in the different developments of the theory, but it is this Marxist link that has led the theory to be described as an activist or interventionist theory that aims not only to describe the world, but to actively change it (Sannino, 2011) and to not accept existing conditions but to ‘view each action also as transformational—changing the life conditions and ourselves’ (Roth, 2004, p.7). This overarching aim has parallels in the ethos of volunteering, which is often promoted ideologically as a way to make a difference and change the world. However, previous studies on volunteering have been criticised for neglecting the role of history and for being ‘ahistorical’ (Chambré, 1991).

CHAT has been widely applied to educational research (Roth, 2004), due to its focus on development and learning, and its ability to encompass the whole system, including both the participants and communities within it (Roth and Lee, 2007). In particular, the workplace has provided a useful context for numerous CHAT studies. Scribner (1997) argues that this focus is due to: work being the dominant activity for most adults; the tendency for adults to identify themselves through their work; and that work offers opportunities for developing expertise and acquiring knowledge. However, while research into learning within the activity of work through a CHAT perspective is plentiful, there has been little focus on unpaid work, such as volunteering.

CHAT is a phrase that was originally coined by Cole, which he describes as an amalgam of terms proposed by the psychologists working in Soviet Russia during the early 20th century, such as Vygotsky, Luria, Leontyev and their students (Cole, 2005). CHAT has been described as ‘a theoretical umbrella’ (González Ray, 2014, p.1) and a
‘set of articulations’, such as different lines of thinking with emphasis placed on different concepts, rather than a unified theory (Holzman, 2006, p.5). In this thesis, CHAT forms the broad approach to the study, and particular developments of CHAT to understand learning will be examined in the following sections, specifically focusing on the theories of expansive learning (Engeström, 1987) and Transformative Activist Stance (TAS) (Stetsenko, 2008). Before these theories are discussed in detail, three main concepts of CHAT are presented to provide a grounding of the theoretical perspective. These include: mediation through artefacts, historical development and practical activity (Cole, 1996).

3.3 Mediation through artefacts

CHAT originates from the work of Vygotsky, who proposes that interaction between human beings and their environment is mediated through the use of artefacts or tools/signs. Referred to as the first generation of activity theory (Engeström, 1987) the work of Vygotsky focuses on understanding the development of the mind, or consciousness, through a new psychology (Roth, 2007b). As a psychologist, much of Vygotsky’s work focuses on the development of higher cognitive functions, which is not the focus of my thesis and these ideas will not be presented in detail. However, this section will focus on Vygotsky’s idea of mediation, which is one of the fundamental concepts of CHAT and imperative in understanding learning as more than an isolated, individual cognitive process.

The idea of mediation was a radical departure from the dominant cognitive psychological perspective at the time Vygotsky was working, which proposed that reactions by humans to a stimulus occurs internally through biological means. By inserting social and cultural mediation into this process, Vygotsky (1978, p.27) argues that human beings had the agency ‘to control their behavior from the outside’. Stetsenko (2004) argues that it is these cultural tools that enable humans to transform
the world, rather than passively adapt to existing natural conditions. The concept of activity mediated by tools/signs is shown in Figure 1.

![Figure 1. Stimulus-response process (Vygotsky, 1978, p.27)](image)

Vygotsky (1978, p.26) provides the example of tying a knot in a handkerchief as a way that mediates memory, which allows humans to go beyond ‘the limits of the psychological functions given to them by nature’ and advance to a ‘new culturally-elaborated organization of their behavior’. The activity of remembering is transformed from memory inside ‘the head’ to memory that was semiotically mediated externally by the knot, which symbolised the memory: in other words, a ‘cultural form of behaviour’ (Cole, 1996, p.114). Therefore, activity ‘exists only as mediated’ (Lektorsky 2009, p.87) and the concept of mediation integrates social and cultural factors into learning in a dialectic relationship. This relationship moves beyond the view that such factors are mere influences on learning and challenges the notion of development as the simple training of skills to solve a problem (Stetsenko, 2004).

A particular cultural tool that Vygotsky (1987) explored was scientific concepts, which are systematically learned in schools or other institutions. Such concepts could include the medical definition of HIV or the lawful definition of rape. Scientific concepts are distinguished from concepts that arrive directly from experience, which Vygotsky termed as everyday or spontaneous concepts. These concepts could include someone’s personal experience of living with HIV. Taking into account both scientific
and everyday concepts can help to overcome the ‘unnecessary strong oppositions between acquisition of knowledge versus participation’ (Vianna and Stetsenko, 2011, p.317). Furthermore, Vianna and Stetsenko (2011), following Vygotsky, argue that scientific concepts reveal important historical and sociocultural practices that are ‘hidden behind’ concepts. For example, part of the history behind the concept of HIV includes the stigma and moral judgement attached to HIV and AIDS patients in the 1980s and early 1990s. This history will be integral to how volunteers learn about the concept of HIV in training. This understanding also helps to avoid verbalism, which is ‘a mindless learning of words’ (Vygotsky, 1987, p.105) where there are just ‘empty words’ without action and the possibility of transformation (Freire, 1970, p.68).

The development of scientific and everyday concepts is different, depending on where they originate, but they can become closely connected (Vygotsky, 1987). Vygotsky argues that the development of scientific concepts provokes changes in the structure of everyday concepts because the abstraction involved in scientific concepts, which are integrated into a system of knowledge related to other concepts, allows the formation of ‘a detailed understanding of the concrete and particular’ (Bakhurst, 2007, p.70). The meeting of scientific and everyday concepts forms actual concepts, which therefore have roots in both institutional learning and life-experience (Blunden, 2015). Therefore, scientific concepts can transform everyday knowledge, which offers ‘a way to develop and refine personal, local knowledge’ (Hegegaard and Chaiklin, 2005, p.12), which is relevant to volunteer training.

The development of such personal and local knowledge can be seen in a study on the US Inside Out project, which involves students from a university and a prison working together within the prison on a semester long course (Maclaren, 2015). In this study, scientific concepts can be seen as mediating the transformation of personal experiences. For example, through the dialogical practice of ‘circle work’, where students sit in a circle and share experiences, students developed a new perspective of the concept of ‘freedom’, which both drew upon and transformed their previous
knowledge. Within this circle work the personal experiences and expressions of the participants also became mediating tools for the learning of the group. Maclaren (2015, p.373) argues that the dialogue that occurs in circle work is more than ‘simply airing different perspectives’ and is ‘transformative action’ (ibid. p.379). Furthermore, rather than the creation of completely new ‘insights’ or ‘truths’, Maclaren (2015, p.374-5) argues that this process of dialogue creates deeper insights into what students were already aware of, which encouraged further questioning of ‘new ways of perceiving the self-same world, others, and one’s relation to them’. This could be described as ‘re-mediation’, where the behaviour of the group and each individual is mediated ‘in a qualitatively new way’ (Cole, 1996, p.285). As Maclaren describes concerning the students on the Inside Out project, the process of re-mediation is a reminder that learners are ‘not blank slates at the start of instruction’ (Cole, 1996, p.285) and that their experiences do not lie dormant within them but are part of a dialectical, interactive relationship within their activity:

One thing in the past dies, loses its sense, and is converted into a simple condition and means of his activity: the developed aptitudes, skills, and stereotypes of behavior; everything else appears to the subject in a completely new light and acquires a new meaning, which he had not perceived before; finally, something from the past may be actively rejected by the subject and psychologically ceases to exist for him although it remains in the compendium of his memory. (Leontyev, 1974, p.131-2)

Maclaren (2015) claims that transformative dialogue requires certain ‘virtues’ and draws on the ideas from Freire of humility, courage, trust, faith, and hope. It could also be argued that as well as these virtues, the dialogue within the Inside Out project is imbued with the culture and values of the course, which aims for students from both school and prison to ‘develop a much greater awareness of their own biases, prejudices, and assumptions and that they dismantle the social barriers that exist between them’ (ibid., p.373).

The environment of the Inside Out course could be described as a zone of proximal development (ZPD) as the teacher has created:
[A] system of culturally mediated social interactions, organized in such a way that the student can, drawing upon prior and ongoing learning, achieve a qualitatively distinct new understanding, a conceptual re-organization that enables conscious control over the newly acquired knowledge. (Cole, 2010, p.361)

The ZPD describes the gap between the level of actual development and the level of possible development in collaboration with another person (Vygotsky, 1978). Through this concept, Vygotsky argues that the mind should not be studied in terms of what it knows, but in ‘the process of becoming’ (Daniels, Cole and Wertsch, 2007, p.8). This process is described in the Inside Out project as a process of both self-transformation and social transformation and it aligns with the description of the ZPD as: ‘a collective process and interactive space in which social transformation takes place’ (Vianna and Stetsenko, 2006, p.88). The emphasis on a dialectical relationship is important to avoid the conceptualisation of such a mediated process as mechanistic (see criticisms by González Rey, 2014).

Vygotsky (1978) distinguishes between learning and development, and argues that it is learning that advances development. Rather than direct instruction with a fixed learning outcome, Vygotsky (1978) argues that an environment should be created that will support a child’s learning. Vygotsky discusses the ZPD in terms of a child being guided by an adult, but in the case of volunteer training it could be the trainer, charity staff, other volunteers or even users of the charity’s services. In the ZPD however it is the instructor that has the responsibility for creating these zones (Engeström, 1994). Luckin et al. (2003, p.166) describe this collaborative assistance as the existence of a ‘more able partner’ and argue that this assistance depends on how the learning environment is structured, what pathways exist through it and how it is perceived by learners:

Of course, the question of effective collaborative assistance is not just about the content of the help provided by a collaborator, human or digital, it is also about how that help is made available to learners. (Luckin et al., 2003, p.166)

For Vygotsky (1978) learning drives this zone of development forward: the more you learn, the greater are the possibilities for your development. Learning is thus conceived not as a purely psychological function with learners responding to stimuli, but as an
activity mediated by social and cultural artefacts. Overall, mediated activity produces what Cole describes as multi-directional consequences:

\[\text{It simultaneously modifies the subject in relation to others and the subject/other nexus in relation to the situation as a whole, as well as the medium in which self and other interact. (Cole, 1996, p.144-5)}\]

Therefore, due to this dialectic relationship, both learner and artefacts are transformed and reconfigured through activity, which is a dynamic and ever changing process.

This section has explained how the concept of mediation within CHAT can be drawn upon to go beyond viewing learning as an isolated cognitive process and conceptualise it as socially and culturally mediated with the potential for transformation. The next section will further explore the mediated process of activity by examining the historical context, motivations, values and emotions that are an integral part of this process.

### 3.4 Historical development: The object of activity

The previous section conceptualised learning as a mediated activity. This section expands on this idea by exploring the wider aspects involved in activity, beginning with the importance of historical development.

As a theory with culture at its centre, the historical development in which an activity takes place is an inseparable part of CHAT. Considering the historical development of charitable organisations is particularly important when exploring the activity of volunteering, as this development will have shaped the practices and knowledge within the system, or as Cole (1996, p.109) describes, ‘the rediscovery of the already-created tools in each succeeding generation’. Within CHAT, history is viewed as an ongoing dynamic process, rather than a dormant fixed entity (Leontyev, 1974). Such a view of history is useful in understanding the practices and work within organisations such as charities, how they have developed and the impact this has on learning for the subjects within it.
Vianna and Stetsenko (2006, p.82) define history as ‘a continuous flux of social practices, to which each new generation contributes, while inevitably transforming it’. The authors describe this definition as a ‘dialectical notion of history’ where time is ‘a continuous flow, in which the past, the present and the future are blended and always contained in each other (ibid., p.89). The connection of the past, present and future is achieved in CHAT through a complex conceptualisation of the objective and motivation of the activity, which is called ‘the object’. The object has been described as a ‘complex, multifaceted, organizing principle of an activity that evolves over time’ (Foot, 2002, p.139) and ‘simultaneously given, socially constructed, contested, and emergent’ (Blackler, 2009, p.27).

The object is considered to be the driving force of activity and without an object there can be no activity (Leontyev, 1974). Therefore, actions in an activity only make sense with knowledge of the wider object. For example, the idea of people giving up their time to work for free makes little sense on its own, particularly in our current capitalist system. However, once the wider object of social change and social justice is known, these actions are understandable. Individual volunteers may have their own personal reasons for volunteering, for example to meet people or gain experience, but these individual reasons are not necessarily the shared object of the collective activity.

The object of activity has been described as ‘one of the most fundamental notions’ of the CHAT approach and has become ‘a powerful analytical tool that helps to reveal the fundamental aspects of social practice, and support structured, meaningful interpretations of empirical data’ (Kaptelinin and Miettinen, 2005 p.1). In particular, the notion of object incorporates aspects that are vital in understanding the process of learning, including subject transformation, agency and emotions. There have been calls for further research into each of these aspects respectively (e.g. Nardi, 2005; Edwards and Mackenzie, 2008; Edwards and Daniels, 2012) and the object in general (Kaptelinin and Miettinen, 2005), and this thesis argues that the charity and voluntary
environment offers much opportunity to further explore and explain these aspects in relation to learning.

The object is not described as a ‘distinct entity, but rather as a complex and contradictory assembly of heterogeneous materials embedded in social and economic relationships’ (Miettinen, 2005, p.53). The object is always social or collective because it is specific to society and ‘an integral part of what is appropriated in societal relations with others’ (Roth, 2014, p.9):

First, it would be a mistake to assume that objects are ‘just given’; objects are constructed by actors as they make sense, name, stabilize, represent and enact foci for their actions and activities. Second, at the same time it would also be a mistake to assume that objects are constructed arbitrarily on the spot; objects have histories and built-in affordances, they resist and ‘bite back’. (Engestrom and Blackler, 2005, p.310)

The object of activity is therefore always present in two forms, ideal and material (Foot, 2002), and requires formulating, where subjects ‘figure out’ what it should be and instantiating, where subjects work on the object to ‘realise it’ (Nardi 2005, p.40).

Therefore, an object is ‘conceptualized, engaged, and enacted by participants in the activity in diverse ways’ (Foot, 2002, p.139). In her ethnographic study on a network of conflict monitors in the post-Soviet sphere, Foot (2002) aims to show object formation as a developmental process, as both subject and object are transformed through activity (Cole, 1996). As subjects in the study participated in the activity, their understanding of the object was transformed, mediated by their personal experiences, their relationship with other subjects in the activity and the cultural-historical properties of the object (Foot, 2002). Therefore, working towards the object has a transformative effect on both the individual and system of activity.

This view of the object as socially produced and a ‘transitional being’ (Engeström, R., 1995, p.202) challenges the view that motivation is internally driven and separate to the surrounding environment. Such a view is prominent within the literature on volunteer motivation, which concentrates on individual motivations, where motivation is separated into ‘intrinsic’ and ‘extrinsic’ factors (e.g. Finkelstien, 2009). This literature
has also tended to concentrate on initial, rather than ongoing, motivation, even though, for most UK health and social care charities, retention of volunteers is a bigger concern than recruitment (Darley-Nolan, 2013). Drawing upon a dialectical concept of individual-social motivation will be useful to understand how volunteers continue to be motivated in order to learn about challenging and often upsetting topics. This is particularly important in the area of health and social care where volunteers are supporting ‘vulnerable populations’ and training can feel overwhelming and induce anxiety (Hutchinson and Quartaro, 1993). These feelings can lead to burnout (Musick and Wilson, 2008), defined as physical, emotional and mental exhaustion, which can result in volunteers leaving the organisation (Scherer, Allen and Harp, 2016).

Roth (2014) describes the transformation of subjects as they work on the object as *subjectification*: subjects are transformed in the process of being ‘subjected’ to the activity. Therefore a subject, rather than moving in and out of different activities, or across boundaries, is an integral ‘moment’ in the whole of an activity (*ibid*.). Following the subject-object dialectic that is at the root of CHAT, the term subjectivity is more appropriate than identity as it refers to ‘the particular, possibly chosen, aspect that a subject presents in relation to the object of activity’ (Williams, Davis and Black, 2007, p.3). The idea of a ‘volunteer identity’ has been proposed to explain volunteering as not just something people do, but as being part of ‘who one is and is recognized as being’, which has been linked to the extent to which people donate time and money and also their intention of continuing volunteering (Finkelstien, 2009, p.653). However, the concept of subjectivity as defined by Williams *et al.* (2007) is helpful in moving beyond existing findings because the concept of subjectivity takes into account the object of activity, or motivation for volunteering, and also the division of labour that positions subjects within an activity.

Through the subject’s projection of their perceived needs onto the object of activity, values have a crucial role in shaping subjectivities (Williams, 2011). The emphasis on values is particularly relevant to voluntary activity, which has been described as
‘essentially value based’ (Gerard, 1983, in Kendall and Knapp, 1995, p.71). The charity and voluntary sector is distinguished by its ‘values-expressive character’ because organisations within it have generally been created to express the ‘social, philosophical, moral, or religious values of their founders and supporters’ (Jeavons, 1992, p.404). Values have even been attributed to guiding the behaviour of individuals within the sector (Kendall and Knapp, 1995). Training practices in particular have been considered as a way to link the values of the organisation to the individual aspirations of volunteers (Akingbola, Duguid, and Viveros, 2013). It is clear that any exploration of learning within this context must take into consideration values, which regulate activity and practices within these organisations.

In German and Russian there are two separate words for ‘object’: *Gegenstand*, the motivation that drives the activity, and *Objekt*, which is met by the activity of subjects (Blunden, 2013). Nardi provides a useful example of the dual meaning of ‘object’:

> The first sense of object in English [*Objekt*] denotes that which is to be realized, such as a cure for cancer. The second sense is a system of motive-object, such as making the world a better place linked as a motive to the object of a cure for cancer [*Gegenstand*]. (Nardi, 2005, p.40)

A cure for cancer could be described as a ‘runaway object’, which Engeström describes as having a global scale of influence:

> They are objects that are poorly under anybody's control and have far-reaching, unexpected side effects. Actor-network theorists (Law, 1991) point out that such objects are often monsters: They seem to have a life of their own that threatens our security and safety in many ways. They are contested objects that generate opposition and controversy. They can also be powerfully emancipatory objects that open up radically new possibilities of development and well-being… (Engeström, 2008, p.227)

Runaway objects have been described as having the potential to challenge and develop the theory and practice of expansive learning because they ‘require and generate new forms of expansive learning and distributed agency’ (Engeström, 2008, no page number). The notion of agency within CHAT is not an individual concept but a process between the subject and the system: ‘in the sense that people are created by the social conditions of their life at the same time as they also actively create and
shape these conditions (Stetsenko, 2007, p.111). Roth and Lee, (2007, p.214) demonstrate the importance of agency in their study on a school environmentalism project, where students are described as having ‘a degree of control over the object’. This sense of control creates emotional significance (Lompscher, 1999) or ‘positive emotional valence’ for the students involved in the activity (Roth and Lee, 2007, p.214). Engeström agrees:

Motivation is substantial when the study is founded on one’s interest in the content and usefulness of the subject matter, when the student perceives its "use value" in mastering and understanding or developing and transforming the practices he or she is engaged in. (Engeström 1994, p.20)

A study by Roberts (2013) on workplace learning in a large national retail company shows the impact on motivation when learners place little value on the usefulness of the subject matter. The study included 24 young men, aged 18-24, and focused on the accredited training available to them within the company. The training, which involved studying for a National Vocational Qualification (NVQ), was viewed negatively by the participants who described it as a ‘total waste of time’, that was not of any value to prospective employers and could even do more harm than good to prospective employment (ibid., p.274). Therefore, in this study both the use value to the young men and the exchange value of the NVQ to employers were viewed as limited, which resulted in a lack of motivation from employees to engage in training.

Leontyev claims that the relationship between the motives and the success, or possibility of success, of realising the action of these motives is reflected by emotions:

Here we are speaking not about the reflection of those relationships but about a direct sensory reflection of them, about experiencing. Thus they appear as a result of actualization of a motive (need), and before a rational evaluation by the subject of his activity. (Leontyev, 1974, p.120)

Therefore, capturing the emotions and ‘passions’ that imbue activity should be accounted for in order to develop ‘a rich theory of collaborative object-oriented activity in which human agency is a guiding principle’ (Nardi, 2005, p.41). This is an area that has been criticised as being absent from many CHAT studies (ibid.) and the traditional separation of affect and intellect has limited the understanding of ‘why the learners do
what they do’ (Roth and Radford, 2011, p.viii) (italics in original). Vygotksy (1987, p.8) argues that this separation results in the process of thinking becoming an *autonomous stream:* ‘Thinking itself became the thinker of thoughts. Thinking was divorced from the full vitality of life, from the motives, interests, and inclinations of the thinking individual’.

The process of working towards the object is relational and implemented through negotiation and dialogue (Miettinen, 2005), which also involves emotion or ‘the passions that imbue human activity’ (Nardi, 2005, p.41). Nardi (2005) outlines the transformative potential of the emotions of subjects on the activity and particularly its object, and Roth (2007a, p.41) argues that emotions are ‘integral to what people do and know in the workplace’. An ‘emotional investment’ has also previously been identified as being central to the motivation of long-term volunteers (Danson, 2003 in Rochester et al., 2010, p.29). This kind of ‘emotional payoff’, according to Roth, is why subjects assert their agency and participate in certain activities:

> Individuals choose to participate in activities and, as part of this participation, choose goals that promise some type of payoff – more often than financial, payoff is related to satisfaction, sense of accomplishment, expansion of action possibilities, expansion of control over life conditions – and higher emotional valence. (Roth 2007a, p.55)

In summary, the object of CHAT is a useful analytical tool in this study because it enables a more complex understanding of the motivations of volunteering activity, which are central to understanding learning within this context. It also enables an understanding of how both subject and object are transformed through activity. The aspects of emotion and values have been acknowledged as being integral to the object of activity, and studying learning within a voluntary and charity context aims to expand on these aspects. The next section will explain how a group of people work towards the object through organised and collective activity.
3.5 Practical activity

The previous section highlighted the importance of the historical context of activity, and introduced the notion of the object in capturing this temporal aspect. This section will explain how collective activity is organised to work towards this object, including the potential for transformation.

CHAT proposes that in order to analyse human psychological functions, such as learning, they must be grounded in everyday activities (Cole, 1996). This is important because ‘the object takes its shape and acquires its value by virtue of being transformed by human labour’ (Engeström and Blackler 2005, p.322). Therefore, in order to understand both processes of learning and the motivation for collective activity within an organisation such as a charity, the ways in which labour is divided to work on the object must be examined. Leontyev (2009) uses an example of the primeval hunt to describe an activity with a collective object, which is organised through the division of labour. In the example of the hunt, the activity is directed at a need (hunger-satisfaction) and an object (the animal being hunted), which is the motivating force for activity. Food is the motive of this activity, but individual participants within the hunt perform actions that are not directly aimed at obtaining food, and their shared motive and individual goals will not usually coincide (Leontyev, 1974). This example helps to outline the main concepts of CHAT:

A beater (the subject) frightens the prey (the object of action) in order to make it flee (the action’s goal). But the motivation of this act is to fulfil a need (arising from hunger, or cold). There is an idea of the prey as a potential object of consumption to satisfy needs (food, clothing). But this would be a meaningless, motivation-less act without the others in the community who will ambush the frightened prey (according to the division of labour in the hunt) and a set of rules, including the norms and expectations about how the prey will be shared. (Williams and Wake, 2006, p.323-4) (Italics in original)

The example of the hunt shows the expansive possibilities for a collective activity, which were also present in the ZPD detailed in section 3.3. Therefore, the division of labour in a collective activity allows subjects to gain more than is possible in an individual activity.
Presenting activity as something that is achieved through a division of labour is useful for exploring learning and development within an organisation, and in my case a charity. Taylor et al. (2008) drew upon this concept in their comparative study of two US-based voluntary organisations, which included the Triangle Lesbian Organization (TLO) and the No-Kill Cat Shelter (NKCS). They argue that the ‘highly routinized labor process’ in the NKCS, which had clearly ‘defined rules and expectations’, created ‘a more satisfying volunteer experience’, which in turn resulted in increased motivation and thus higher rates of volunteer recruitment and retention for the organisation (ibid., p.405). In contrast, volunteers within TLO experienced uncertainty and confusion around the expectations of their role, which the authors claim resulted in an ‘unsatisfying’ volunteer experience and led to volunteers leaving the organisation. This study illustrates that a collective activity is also regulated by emotions, which reflect the progress, or the subjective perceptions of progress, to the desired or imagined outcome of the activity (Roth and Radford, 2011).

Rather than being an ‘inner state’, emotions are understood within a CHAT perspective as revealing ‘the social nature of needs and desires as they are expressed in an activity system’ (Nardi, 2005, p.48):

The special feature of emotions is that they reflect relationships between motives (needs) and success, or the possibility of success, of realizing the action of the subject that responds to these motives. (Leontyev, 1974, p.166)

While subjects are positioned differently in an activity system, Williams et al. (2007, p. 3) argue that there needs to be ‘sufficient intersubjectivity to coordinate their work on their common object’. Taking into account how subjects are positioned in relation to each other enables a greater understanding of the dialectical relationship between subjects and the activity system:

Subject is often discussed in terms of individuals, groups or perspectives/views. We argue that the way in which subjects are positioned with respect to one another within an activity carries with it implications for engagement with tools and objects. It may also carry implications for the ways in rules, community and the division of labour regulate the actions of individuals and groups. (Daniels and Warmington, 2007, p.382)
In the previously mentioned comparative study, Taylor et al. (2008), argue that work was coordinated on the object more 'successfully' in NKCS because the activity involved fewer interactions between volunteers, which the authors claim avoids opportunities for 'conflict' and 'confrontation' that emerged through volunteer interactions in TLO. However, Matusov (1996) argues that intersubjectivity involves both agreement and disagreement, and 'dialogical exchanges' are considered to be central in developing shared meanings within shared activities (Rojas-Drummond, Gómez, and Vélez, 2008, p.320):

[Intersubjectivity develops in activity settings during joint productive activity, facilitates the activity, and becomes the shared meanings of culture through semiotic processes (largely linguistic) that accompany the members' shared activity. Intersubjectivity results from the shared experiences among people engaged in collaborative interaction: their history, values, thoughts, emotions, and interpretations of their world. (O'Donnell and Tharp, 2012, p.23)]

Developing shared meanings around a shared object is also an aim of volunteer training, as is shown in the study by Rath (2008) on the training experiences of UK Rape Crisis counselling volunteers. Training of these volunteers aims to develop shared meanings of topics relating to sexual violence, including 'male power and myths' and 'anti-oppressive practice', which are historically informed by 'second wave feminism's tradition of consciousness-raising' (ibid., p.21).

As was introduced in Chapter 1, Engeström (1987) developed the idea of division of labour within activity into an activity system, which is described as 'a group of people who share a common object and motive over time' (Russell, 2002, p.67). An activity system is visually depicted in a triangular formation (Figure 2) and is the smallest analytic unit that:

[Cannot be broken into 'elements,' but rather any pair of analytically identifiable, contradictory 'moments' always are mutually constitutive and therefore cannot be thought independently of each other. (Roth, 2007b, p.656)
However, although Roth acknowledges the usefulness of the triangular formation in considering human activity, he argues for the need to:

[T]hink about it together with the sensuous nature, emotive, identity-related, and ethico-moral dimensions of human actions and activities that currently are not highlighted in this representation. (Roth, 2009, p.65) (italics in original)

As well as neglecting the emotional aspects of activity, the triangular formation has been criticised for presenting activity as static, rather than dynamic and ever-changing, following the dialectic roots of the theory:

The structural approach to activity – with the pervasive triangles some scholars tend to draw – fails to capture one of the fundamental ideas of Marxian thought: the purpose of a theory of human activity must be to understand and capture the dynamic of life, not its structures. (Roth and Radford 2011, p.7)

Avis (2009, p.165) even describes this development of activity theory as a ‘conservative praxis’, which neglects power structures and aims only to reproduce the status quo rather than change it. However, for empirical studies activity systems have been viewed as a helpful analysis tool when researching complex learning environments, defined as ‘situations in natural settings where multiple individuals are involved in shared activities within a single or multi-organizational context’ (Yamagata-Lynch, 2010, p.vii). Furthermore, Engeström has argued that the third generation of
activity theory, which involves at least two interacting activity systems as shown in Figure 3, can incorporate multiple perspectives and dialogue:

An activity system is always a community of multiple points of view, traditions and interests. The division of labor in an activity creates different positions for the participants, the participants carry their own diverse histories, and the activity system itself carries multiple layers and strands of history engraved in its artifacts, rules and conventions. (Engeström, 2001, p.136)

![Figure 3. Two interacting activity systems as minimal model for the third generation of activity theory (Engestrom, 2001, p.136)](image)

To describe these different perspectives and voices, Engeström draws upon the concept of multivoicedness from Bakhtin. Multivoicedness is seen as a concept that allows for cultural diversity within and between activity systems (Kagawa and Moro, 2009) and was visible in the dialogical practice of ‘circle work’ in the Inside Out study (Maclaren, 2015). This multivoicedness, along with layers of historically accumulated artefacts, rules, and patterns of division of labour, both drives activity forward and is a source of tension and contradiction (Engeström, 2008). The concept of contradiction is fundamental to the process of development in CHAT and will be discussed in detail in the next chapter.

In summary, the division of labour enables an understanding of how subjects work towards an object in collective activity and how this provides expansive possibilities for both subjects and the activity. Particularly useful for understanding learning within a charity and voluntary context is the inclusion of multiple voices and different positions within this division of labour and the role of emotions in regulating the activity.
3.6 Summary

This chapter has presented an overview of the main concepts of CHAT and explained how CHAT offers a useful perspective on learning within volunteer training. The idea of mediation by Vygotsky was outlined as vital for understanding how learning is theorised to take place within CHAT: that learning is not an isolated process occurring in one’s head, but a process mediated by cultural and social aspects. This conceptualisation supports the argument that learning within volunteer training in a charity will be different to learning within an educational institution and therefore requires specific investigation. The examination of the concepts of CHAT in previous studies have revealed important insights into learning, and I believe that examining these in a new and relatively unexplored environment will forward the development of CHAT.

This chapter has argued that CHAT offers a fruitful approach to studying how people learn because it integrates the individual and the social in a dialectic relationship. However, this dialectic and dynamic relationship is a challenge to analyse in empirical data and researchers drawing upon this approach have been accused of simplistically splitting up the activity system to look for factors that had ‘somehow influenced or caused what was happening’ (Roth, 2014, p.7). Roth argues that this tendency to highlight forces external to the system as driving development, or explaining self-development as being driven by individual agency, both fail to specify: ‘what underlies the movement and development of individuals and institutions’ (ibid.). The next chapter will further examine how learning is conceptualised in CHAT and will go on to synthesise two theories of learning within this perspective, which are expansive learning (Engeström, 1987) and TAS (Stetsenko, 2008).
4. Conceptualisations of learning in CHAT

4.1 Introduction

The previous chapter outlined the main concepts of CHAT, which include mediation through cultural artefacts, the object of activity (both material and ideal), and the system of activity, including the division of labour. This chapter focuses on how a CHAT conceptualisation of learning can both further understanding of volunteer training and challenge the existing dichotomised view of learning within this area. Following this introduction two CHAT-informed theories of learning will be considered in detail: expansive learning (Engeström, 1987) and Transformative Activist Stance (TAS) (Stetsenko, 2008).

Within CHAT, learning is conceptualised as ‘a dynamic phenomenon stretched across people, places, and cultures’ (Roth, 2012, p.256). By drawing upon this definition of learning in my study, I aim to propose a more nuanced approach to studying practices of training within volunteering. Such an approach will involve both so-called ‘knowledge acquisition’ and ‘participation in practices’ as part of a co-constructed, relational and negotiated process with and within the specific context of the charity. Learning is broadly defined in CHAT as a process of re-mediation: acting on an object that involves the use of social and cultural tools to mediate ‘the behaviour of the group and each individual in it in a qualitatively new way’ (Cole, 1996, p.285). Drawing upon a CHAT perspective allows more than just exploring learning within a context, because it conceptualises learning as a process of interaction between the individual and their environment (Vygotsky, 1994). Therefore, as was described in the Inside Out study (Maclaren, 2015) detailed in the previous chapter, the experiences and knowledge of subjects are not just ‘brought’ into training, but they continuously interact within the activity, becoming tools for the process of re-mediation, as described by Cole (1996). As was outlined in section 3.4, subjects have a dialectical relationship with the object, so the subject always changes as the object changes through being worked on within
activity. By participating in the Inside Out project, students from the school and the prison changed their perspective on both themselves and each other. This process of mutual change is described as learning (Roth and Lee, 2007) where knowledge is a process rather than a product, which is ‘performed and enacted’, (Stetsenko and Arievitch, 2004a, p.68) in the dialogical practice of the circle work in the Inside Out project. In CHAT, knowledge embodies past practices in a certain historical and political point in time (ibid.). This knowledge can then be used in ‘future practices and visions of the world’ (ibid., p.69) thus becoming ‘a form of active transformative engagement (=meaningful activity) of people with their world’ (ibid., p.60). Therefore a CHAT approach overcomes the limited view of knowledge as an abstract outcome, detached from real life issues, and conceptualises it as a ‘deeply historical process imbued with human values and also linking the past, the present, and the future’ (ibid., p.71).

Engeström (1994, p.12) claims that meaningful learning occurs when ‘new knowledge, new tasks, run into and merge with the learner’s activity and former knowledge’. Such meaningful learning is conceptualised as a process of transformation in CHAT, which involves inner contradictions embodied in the dialectical subject-object relationship (Roth and Lee, 2007). These historically evolving inner contradictions create movement and change in activity systems (Engeström, 1999a). The concept of contradictions within CHAT, which was introduced in section 3.5, allows the conceptualisation of a more complex understanding of self-development, as can be seen from the experiences of the Inside Out students. Roth (2012, p.263) also conceptualises knowledge as a dialectical entity, rather than two different points of ‘prior’ and ‘post’ knowledge, which contains an inner contradiction. This dialectical entity contains both formal and informal knowledge, and the inner contradiction is that this ‘minimal unit’ includes both prior knowledge and post knowledge simultaneously (ibid.). Contradictions in the CHAT tradition have a specific meaning that is different to logical contradictions: ‘inner contradictions do not and cannot be made to disappear: they are
endemic, expressions of change, and always reappear in new form’ (ibid., p.272). Roth (2012, p.263) uses the term ‘sublation’ from Hegel to describe this process of ‘the simultaneous disappearance and retaining of a contradiction’. It is this dialectical approach and the potential for transformation that allows learning to be viewed as an ongoing and dynamic process, which challenges previous conceptions of learning within volunteer training, as reviewed in Chapter 2. The next section presents a synthesis of two CHAT-informed theories that explain learning as a process of individual and social transformation.

4.2 Expansive learning and Transformative Activist Stance (TAS)

This thesis draws specifically on the CHAT-informed theories of expansive learning (Engeström, 1987) and TAS (Stetsenko 2008), which provide concepts that form a useful analytical lens for this study. Both theories are particularly suited to the context of the charity and voluntary environment and this relevance will be further justified in the following sections. The following synthesis of expansive learning and TAS aims to explain how each theory conceptualises learning and highlights the similarities and differences between each approach, drawing upon studies of volunteering. Chapter 5 will build on this synthesis by defining specific concepts from each theory that will be drawn upon in this study.

4.3 Transformation

Expansive learning and TAS both explain the transformative potential of learning as a dialectical process (Engeström, 2007; Stetsenko, 2008) but have empirically conceptualised this potential from slightly different perspectives. Expansive learning is explained from the perspective of an organisation, a hospital or a library for example, which is defined as an activity system. Expansive learning occurs in the system when
subjects within it are faced with historically accumulated contradictions that force them to individually question the status quo, and collectively create new knowledge and activity that transforms themselves and the activity. In the words of Engeström (2009a, p.25): ‘the community learns to widen its object and possibilities for action by re-designing its own activity’. The stages of this process are illustrated in Figure 4:

Figure 4. The expansive learning cycle (from Engeström and Sannino, 2010, p.8)

The theory of expansive learning was developed primarily through studies on work activities, however more recently it has been called on to address wider societal needs. Engeström and Sannino (2016, p.16) have argued that the main challenge of expansive learning is to engage in ‘the formation and fostering of alternatives to capitalism’, where learning and instruction can help ‘build sustainable and equitable ways of life.’ Sustainability and equity are goals also shared by many charitable organisations. Mündel and Schugurensky (2013) argue that social change is an explicit
or implicit goal of many voluntary organisations working on community causes and that learning is the most effective way of working towards this goal.

TAS also focuses on how learning can make a difference in the world by ‘opening up new horizons for personal and social growth’ (Vianna and Stetsenko, 2011, p.319).

Following what Stetsenko (2008, p.471) has described as a relational ontology, TAS theorises that the grounding for learning and development is the ‘collaborative purposeful transformation of the world’ (italics in original). Within a Transformative Activist Stance, human nature and development concerns:

[...]

This conceptualisation provides a view of learning where knowledge is a purposeful activity and learning is the process of people acting on the object of this activity ‘conducted in view of social goals and agendas’ (Stetsenko and Arievitch, 2004a, p.60).

Learning is seen as becoming meaningful when it is aimed towards these social goals and agendas, ‘in the service of developing a meaningful life project centered on commitment to changing social and community practices’ (Vianna and Stetsenko, 2011, p.320). Such meaningful life projects or pursuits are mediated through the use of theoretical knowledge as a ‘transformative tool’ (ibid., p.317). In TAS, this process is not a ‘mundane occurrence’, but one that involves struggle as individuals take ‘an activist stance vis-à-vis the world’ and commit themselves to ‘a vision of how the world should be and to developing a life project to achieve this vision’ (Stetsenko 2012, p.151) (italics in original). Such a life project, or activist project, is ‘imbued with dialogism, ethics, and interrelatedness’ and is also grounded in collaborative and purposeful activity (ibid., p.147).

Although TAS has so far not been widely drawn upon in studies on volunteering, the theory can be identified in previous studies that have shown the wider, collective impact of volunteering. For example, in a study on hospice volunteers, Morris et al. (2015, p.2) describe these volunteers as ‘bridging the gap to the community’, as
volunteers not only ‘bring the community into the hospice’, but they also ‘take the hospice out into the community’. For example, by challenging external negative views about hospices, such as them being places where people just ‘go to die’. Hwang and Powell (2009, p.274) have described such a process as ‘exchanges of knowledge’. This kind of exchange, or wider awareness raising, has been described as integral to learning and training in the charity sector (Akingbola et al., 2013) and can be transformational for volunteers. For example, in a study on UK Rape Crisis training, Rath (2008, p.30) described ‘the complex, transformative processes’ that were experienced by volunteers during training. This manifested itself through career changes, changes in personal relationships and political awareness.

In TAS learning is theorised to occur as individuals act on meaningful life pursuits through collaborative activity and gain knowledge about the world and themselves:

[PPeople not only constantly transform and create their environment, they also create and constantly transform their lives and themselves. Moreover, it is in and through this process that people simultaneously gain knowledge about themselves and their world. (Vianna and Stetsenko, 2011, p.317)

This explanation of personal and social growth is demonstrated in the ethnographic study by Bloom and Kilgore (2003) on volunteers supporting families living in poverty in the US through a non-profit organisation called ‘Beyond Welfare’. Volunteers are partnered with ‘families struggling to emerge from poverty’, with the dual aim of reducing social isolation for these families and increasing understanding of the challenges of poverty for volunteers (ibid., p.434). The study outlined how, through their activity, volunteers learned about ‘poverty, the welfare system, the isolation of people in poverty, the stigmatization of those in poverty, and the relationship between poverty and domestic violence’ (ibid. p.447). Volunteers were also described as learning ‘about themselves’, gaining new perspectives on the reality of living in poverty and expressing compassion and empathy.

However, Bloom and Kilgore argue that while the learning experienced by volunteers through their activity changes them, it cannot change the ‘serious social problem’ of
poverty. Through the lens of TAS, this assertion can be challenged by the dialectical relationship between the individual and the social, where individuals are positioned as activists with the agency to transform their environment (Stetsenko, 2014). Within TAS, personal transformation is conceived as an integral part of collaborative practice, rather than an individual psychological process (Vianna et al., 2014). This kind of transformation was identified in the Inside Out project, introduced in Chapter 2, as students within the activity became ‘agents of their own transformation’, and also ‘creators of their own social conditions’ (Maclaren, 2015, p.382). Maclaren aligns this transformation to the concept of ‘practice of freedom’ from Freire. TAS draws upon the work of both Freire and Vygotsky and conceptualises the core grounding for human development as individuals collaboratively contributing to and changing their community practices (Vianna and Stetsenko, 2011). Both processes are a core part of volunteering, which is also considered to include social activism (Musick and Wilson, 2008).

Expansive learning is described as the construction of new knowledge (Engeström, 2000) and new culture in the form of tools, ideas and practices (Engeström and Sannino, 2012), which involves a widening of horizons and new possibilities for activity (Engeström and Sannino, 2010). Such widening of horizons can also be seen in the TAS-informed study of a peer activist learning community (PALC), where the transformation of one individual group member, Chris, expands the possibilities for the whole group:

Thus, rather than being limited to one case of personal transformation, as important as that was, Chris’s transformation was not only communally celebrated and a cause of collective pride, but it became embodied in narrative form as a symbolic (cultural) tool to both introduce incoming members to critical analysis of educational practices and models and to disseminate PALC’s mission. (Vianna et al., 2014, p.74)

Challenging the idea of knowledge acquisition, Vianna and Stetsenko (2011, p.318) claim that the processes of teaching and learning provide the opportunity for individuals to ‘acquire the cultural tools that allow for participation in and contribution to social practices and, thus, the pathway to becoming unique individuals.’ This process of
becoming as a form of personal transformation is central to the conceptualisation of learning in TAS and is defined as:

[A] path of a continuous, ceaseless, and dynamic moment-to-moment transformation in one’s standing and relations vis-à-vis the social world carried through one’s own active pursuits whereby a person is constantly changed yet without positing any ontological breaks with the previous states of Being. (Stetsenko, 2012, p.144)

TAS emphasises the unique position of subjects and their activist stance towards the object, or, in other words, their activist pursuits. Therefore educative processes, such as the training of volunteers, are ‘not about acquiring knowledge for the sake of knowing, but an active project of becoming human through one’s own activist pursuits’ (Vianna and Stetsenko, 2011, p.318).

This section has presented how learning is conceptualised as a form of transformation in both the theories of expansive learning and TAS. The next section will examine a fundamental aspect within such transformation, which is the concept of contradictions.

### 4.4 Contradictions

The concept of contradictions is fundamental to CHAT and originates from the idea of the inner contradiction between use and exchange value outlined by Marx. To illustrate this concept, Engeström and Blackler (2005, p.319) provide the example of a contradiction within the health condition of diabetes, where the use value for patients is personal ‘discomfort, suffering and fear’ and the exchange value is the consumption of care to treat the illness. Therefore, a contradiction arises when the object of diabetes is ‘commoditised’:

From the point of view of the patient, diabetes is not any more just his or her personal source of discomfort, suffering and fear. It has become a package where the illness and the care are inseparably intertwined and constitute each other. (Engeström and Blackler, 2005, p.319)

Within CHAT, such contradictions bring opportunities for transformation of the system, including the subjects within it (Engeström, 1999a). Therefore, contradictions are the source of transformation in both expansive learning and TAS because: ‘Activity
systems are never in perfect equilibrium. They are riddled with inner contradictions that can only be re-solved by transforming the activity systems’ (Engeström, 2009a, p.25). Engeström (1999b, p.67) argues that in some instances contradictions cannot be ‘re-solved’, leading to a ‘contraction and destruction of opportunities’. However, in her study of a scientific research group, Nardi (2005) demonstrates the opportunities for personal agency through overcoming constraints; and Stetsenko argues that in all their empirical work on the object, subjects and their environment are both transforming continuously. Ultimately, contradictions do not just ‘re-solve’ themselves, but they are intentionally worked on because people are reluctant to accept them (Popper, 1940, p.407).

Both theories claim transformation begins when subjects are prompted to question the existing status quo and imagine how it could be different. This process involves ‘learning what is not yet there’ as the horizon of possibilities is expanded (Engestrom and Sannino, 2010, p.2). The first stage of expansive learning involves individual subjects within the activity questioning existing accepted practice, which then expands into a collective movement (Engeström, 1999a) because individual actions are not enough to address these contradictions (Miettinen, 2005). The description of expansive learning as learning ‘new forms of activity which are not yet there’ (Engeström, 2001, p.138) is similar to what Stetsenko outlines as the transformative power of knowledge, which draws on Vygotsky’s work on imagination:

> Such a power has to do with people’s ability to imagine what does not yet exist, what they think needs and ought to be created and struggled for, through imagination and action that are challenging the present and stretching beyond the status quo. (Stetsenko, 2014, p.185) (italics in original)

Imagination is therefore central to both theories in addressing contradictions through the imagined object of activity. However, less discussed is the emotion involved in this process, which Vygotsky (2004, p.18) conceptualises as a key aspect of imagination: ‘images of imagination serve as an internal expression of our feelings’.
How subjects are positioned in activity, through the division of labour and through their stance towards the object, creates a dynamic, and potentially contradictory, multiplicity of positions and perspectives, as explained in section 3.5. An expansive learning cycle is described as a ‘re-orchestration’ of the different voices that coexist within the same collective activity system (Engeström, 2008). As within volunteer training, these different perspectives or voices are rooted in different communities and practices (ibid.) and subjects bring with them contradictions as they move between activity systems (Roth and Lee, 2007). However, while expansive learning concentrates on the transformation of the activity system, TAS incorporates both individual transformation and social transformation beyond the system of activity. Furthermore, rather than exploring systemic contradictions, Stetsenko (2007) places importance on societal contradictions, such as poverty and inequality.

Studies of expansive learning and the identification of contradictions have largely taken place in workplace settings (Engeström, 2011), which are described as creating: ‘forces of production that eventually change the world. Societal contradictions are intensively played out in these settings’ (Engeström and Glăveanu, 2012, p.516). However, the voluntary and charity workplace has rarely been included, which is surprising considering that challenging the status quo and advocating for social action are inherent characteristics of volunteering and the charity sector (Synder and Omoto, 2008). Furthermore, Engeström (2015, p.xxxvi) claims that ‘wildfire activities’, such as volunteer disaster relief work, which ‘offer little monetary reward but are very highly motivated’ with ‘strong object and use-value orientation’ have the potential to challenge and aid the development of the theory and practice of expansive learning.

Expansive learning is not a common phenomenon and can be difficult to identify (Engeström, 1999a). To address these methodological issues, an interventionist approach of developmental work research has been developed. This approach creates what is described as a Change Laboratory within an activity that aims to raise awareness among participants in the activity to existing contradictions (Engeström,
Virkkunen and Helle, 1996). The Change Laboratory method is based on Vygotsky's concept of the ZPD, outlined in Chapter 3, and through confronting existing contradictions aims to ‘create new models for the work practice’ (ibid. p.1). For example, a Change Laboratory was conducted within the Finnish Postal Services to redesign the work of mail carriers in response to organisational challenges, such as collaborative working, competition from private companies and a threat of job losses (ibid.).

The Change Laboratory method is specific to the theory of expansive learning and studies on TAS have not followed this method. However, Vianna and Stetsenko (2014) claim that research always intervenes and disrupts the status quo. US-based studies on TAS have been described as ‘transformative activist research’, which have explored social interventions, such as a ‘collective transformative project’ in an adolescent care home (Vianna and Stetsenko, 2011) and a ‘peer-supported activist learning community’ in a community college (Vianna et al., 2014). My study does not follow an interventionist approach and the reasons for this choice are further explained in Chapter 6.

This section has outlined how the theoretical concept of contradictions explains the process of transformation in both expansive learning and TAS. The next section will examine the agency of subjects to act on these contradictions, which is an aspect considered to be of central importance to both theories.

4.5 Agency

The concept of agency is central to both expansive learning and TAS, which relates to the ‘degree of control over the object’ (Roth and Lee, 2007, p.214), described earlier in section 3.4. The activity of volunteering has also been described as ‘a means of promoting human agency’ (ILO, 2011, p.ii), because ‘when volunteering, people “act” or engage deliberatively’ (McDonald and Warburton, 2003, p.382). TAS positions the
individual within the collective in a dialectic relationship that does not neglect the agency of individuals, but in fact conceptualises ‘individual subjectivity and agency’ as what makes the ‘very process of human development and social life possible’ (Stetsenko, 2005, p.71). This dialectical approach allows learning to be viewed as an ongoing and relational process, which challenges the idea of passive subjects merely reacting or adapting to their environment and positions them as active agents able to change themselves and therefore their environment. Learners have become ‘activists’ committed to social change:

[T]he deliberate, goal-directed and purposeful transformation of the world based in a commitment to, and a vision of, social change is the foundation for human development in all of its expressions encompassing processes of being, doing, and knowing. (Stetsenko, 2014, p.183)

Both theories reject an individualistic view of agency and instead agency is explained as ‘collectively produced and maintained’ (Haapasaaria, Engeström, and Kerosuo, 2016, p.235) and ‘a form of active engagement of individuals with their world’ (Stetsenko, 2007, p.111). However agency is conceptualised slightly differently within the two theories. Within expansive learning transformative agency examines: ‘disturbances and contradictions in a local activity and takes actions to transform the activity and its current work practices’ (Haapasaaria et al., 2016, p.257).

Transformative agency emerges and evolves over time and arises when subjects encounter contradictions within a collective activity and they search for new possibilities (ibid.). In expansive learning processes learners are described as striving to become ‘agents of their own learning, which coincides with active reshaping of their collective activity system of work’ (ibid., p.236).

Within TAS, agency is approached through a focus on the dialectical relationship between agency and structure: ‘people are created by the social conditions of their life at the same time as they also actively create and shape these conditions’ (Stetsenko, 2007, p.111). Therefore Stetsenko argues that:

[F]or agency to develop and be effectual, not only do individuals need to engage with their society but society also needs to develop the means to
engage individuals in ways that allow for them to be truly agentive participants who are welcome to make a contribution to social life. (Stetsenko 2007, p.112)

Through the perspective of TAS, this dialectic relationship enables ‘co-evolving individual and collaborative agency’ (Stesenko, 2008, p.489).

An example of the dialectical relationship between agency and structure can be identified in a study by McDonald and Warburton (2003), which examined two voluntary-led café services within a non-profit organisation in Australia. One was a daytime café, which provided a ‘safe space’ for elderly men and women shopping in the city centre. The second café was aimed towards homeless young people and opened at night-time. The ethnographic study presented data generated through non-participatory observation and focused on the role of volunteer agency in the promotion of both stability and change within the organisation. Volunteers were positioned as: ‘key institutional agents discursively constructing and perhaps deconstructing the institutional order of the field’ (ibid., p.384). The day café had been operating for over 50 years and volunteers, who were all women aged between 50 and 75, through their social relations and presentation of the physical space were all described as maintaining the traditional institutional order (ibid., p.392). In comparison, the night café volunteers actively constructed an ‘alternative institutional order’, through physically changing the space of the café and forming different relationships with café visitors (ibid., p.396). Overall, the study positions volunteers as active agents able to both sustain and transform the practices and culture of the organisation.

4.6 Summary

In summary, this chapter has outlined the usefulness of the theories of expansive learning and TAS in advancing understandings of learning within the training practices of volunteering. Expansive learning is a particularly useful concept to explore the learning of volunteers in health and social charities where volunteers are being trained to deal with complex societal problems. Therefore, they might be ‘learning what is not
yet there’ (Engestrom and Sannino, 2010, p.2). Furthermore, the nature of the volunteer role and the training content may encourage a questioning of existing knowledge or practices on an individual level and a wider level, which is the first step in expansive learning and TAS. Volunteers also contribute their own experiences and knowledge to training and to their volunteer role that may encourage the creation of new culture, concepts and practices, which occur in later stages of expansive learning. This process may transform the volunteers, the charities and their wider communities as theorised in TAS. This mutual process of transformation for both volunteers and charities is important when considering learning within this context, particularly in light of increasing episodic volunteering, where volunteers are transient but the organisation remains (Synder and Omoto, 2008).

Through my analysis of the literature I found few studies that drew upon both theories of TAS and expansive learning. This chapter synthesised the main concepts of these theories that I argued, used together, provides a useful lens to explore learning within the charity and voluntary context. By drawing on CHAT in this new area this thesis intends to contribute to the further development of the theory. The next chapter outlines and defines the main concepts from expansive learning and TAS that will be drawn upon in this study to interpret the empirical data.

5. Theoretical Framework

5.1 Introduction

The previous chapters outlined the research problem of this thesis and then discussed CHAT-informed approaches to exploring learning that could help address this problem. The argument was put forward that CHAT offers a suitable perspective through which to explore learning in the charity and voluntary environment. Chapters 3 and 4 also identified that this environment offers particular opportunities to further develop certain
aspects of CHAT that are currently under-explored. This chapter sets out the theoretical framework for the thesis and synthesises the CHAT developments most useful for generating and analysing data to answer the research questions. The use of theory in research is argued to increase rigor and transferability of findings (Henstrand, 2006) and by providing a clear theoretical framework the implications of theory on the study focus, data collection, fieldwork and analysis will be considered (Patton, 2002).

The framework used in this thesis does not follow a particular ‘generation’ of activity theory as outlined by Engeström (1987), but it aims to follow a CHAT perspective and brings together two CHAT-informed theories, Transformative Activist Stance (TAS) (Stetsenko, 2008) and expansive learning (Engeström, 1987), in order to interpret the empirical data of this study. Drawing on both theories intends to provide greater breadth in analysis (Mills and Bettis, 2006) and neither theory can be understood without the wider conceptual ideas of CHAT. Furthermore, following a theoretical framework aims to address the call from previous CHAT scholars for the testing of the ‘empirical usability and methodological rigor afforded by the theory’ (Engeström, Rantavuori and Kerosuo, 2013, p.82) through ‘illuminating everyday practices of learners from a broad range of contexts’ (Ritchie, 2008, p.517).

This chapter defines and explains the concepts the theoretical framework draws upon and justifies their use within this study, including how they enable an analysis of learning within the charity environment and volunteer role. The theoretical framework is organised under two main headings, which relate to RQ1 and RQ2 respectively. These headings are ‘Activity’, to define the charity environment, and ‘Transformation’, which explains learning within this environment. Within these headings are CHAT-informed concepts such as subject, object, contradictions, transformation and also the grounding of the theory by Vygotsky. Providing a clear outline of the main theoretical terms used throughout the study aims to define their meaning explicitly and ensure these terms are used consistently during analysis and interpretation of data. My intention by providing a
clear theoretical framework for this study is not to then ‘apply’ it to data, but rather to present the specific way of thinking that data will be interpreted within.

5.2 Activity

Within the perspective of CHAT, activity does not refer to brief events with a set beginning and end point (Engeström, 2008), but rather it has a collective motive and is ‘a societal formation that has historically arisen through division of labor’ (Roth, 2012, p.259). Engeström (2009a, p.23) argues that: ‘The cultural meaning and personal sense of an individual action can only be deciphered by seeing it in the context of the activity it realizes.’

Within activity, ‘human actions are organized with the intention to realize objects that satisfy societal needs’ (Chaiklin, 2007, p.181). Therefore, in this study, activity refers to the volunteering activity taking place within each charity, which intends to work on the object each charity is addressing, including stroke, HIV and sexual violence. In CHAT terms, this activity has been developed in a social and cultural context over time, where a community of subjects work towards the object and are organised through a division of labour, according to the rules of the community. Volunteers will have their own individual goals for getting involved in the volunteering activity and they relate to the shared object of collaborative activity through these different motives.

5.2.1 Activity system

The concept of the activity system from Engeström (1987) will be helpful in this study when considering the different aspects that constitute the volunteering activity and the dynamic and dialectical relationships between them. However, the triangular model Engeström used to depict these relationships (shown in section 3.5) will not be applied. After initially drawing on the model in a preliminary study, in agreement with previous
authors (e.g. Edwards, 2010; Roth and Radford, 2011), I considered it too static a representative of activity and not helpful for conceptualising the dialectical relationships within activity. However, taking into account the different aspects of the activity system of volunteering within each charity was considered useful in exploring learning and training practices. These aspects include the tools mediated by subjects to work on the object, the community of multiple viewpoints, the division of labour that makes up the collective activity and the rules that regulate the activity (Engeström, 2001).

5.2.2 Object

The object of activity is a central concept in CHAT and, as was outlined in section 3.4, it is conceptualised as the force driving the collective activity forward. In this study the dual meaning of object in German terms will be drawn upon in order to take into account the motivation that drives the activity (Gegenstand) and the object that is met by the activity of subjects (Objekt). For example, the Objekt of CS1 is the health condition of stroke, and the Gegenstand is the motive to make the world better through improved conditions for stroke survivors and fewer strokes (adapted from Nardi, 2005). Within this motive is the imagined outcome of activity, which is the motivating force of activity (Williams et al., 2007). The object meets a collective need and is transformed by the collective activity as subjects collaboratively work on it. Drawing upon a dialectical concept of motivation will be useful to understand the motivations of learning within volunteering activity: both the shared societal motivation and the different motives of individual subjects involved in the activity.

The object of activity is an internally contradictory unity of ‘use value and exchange value’ (Engeström, 2008, p.88). Section 4.4 provided the example from Engeström and Blackler (2005) of diabetes, where a contradiction arises between the use value for patients, which is personal ‘discomfort, suffering and fear’, and the exchange value, which is the consumption of care to treat the illness. The authors also discuss the
example given by Leontyev of a doctor whose object has a use value of reducing his patients suffering, but the exchange value is an increased number of sick patients because his job is dependent on their existence. Within the objects that the charities are working towards in my study, the use value is conceptualised as eradicating the health or social issue (e.g. stroke) to benefit society. However, this object also has an exchange value because the charities are receiving funding money to act on it and therefore their actual existence is dependent on it. The idea of a contradiction emerging from the use and exchange value within an object is fundamental to the concept of development in CHAT (Roth, 2012) and will be discussed further in section 5.3.

The concept of ‘runaway’ objects (Engeström, 2008) will be useful to describe the societal challenges addressed by all charities within this study. Engeström (2015, p.xxxvi) describes these objects as ‘affiliated with numerous activity systems’ and ‘pervasive’, with moving boundaries. Particularly relevant to the issues of stroke, sexual violence and HIV within this study is the description of runaway objects as both ‘contested objects that generate opposition and controversy’ and ‘powerfully emancipatory objects that open up radically new possibilities of development and well-being’ (Engeström, 2008, p.227). Conceptualising the objects within my study as runaway objects intends to make a substantive contribution to how these ‘monster’ objects that threaten ‘our security and safety’ (Engeström, 2009b, p.304) can be learned about and addressed by charities and other organisations, as well as a theoretical contribution to the development of expansive learning as called for by Engeström (2015).

5.2.3 Values

The concept of values is important in the charity and voluntary context, and in literature focusing on this sector the term is generally used in its traditional meaning, referring to ‘values related to altruistic and humanitarian concerns for others’ (Clary et al., 1998,
In this thesis, the concept of values is also considered in its dialectical sense, involving the use and exchange value contradiction outlined in the previous section. This conceptualisation of the term values will enable analysis to go beyond outlining the simple relationship between the main focus of a charity and the values it expresses (Blackler, 2009) and allow for movement and change (Roth and Radford, 2011) and thus transformation.

Following the epistemology of this study this conceptualisation also emphasises that values do not exist within the ‘head’ of an individual or within an organisation, but are part of the individual-social dialectic (Roth and Radford, 2011). Therefore volunteers might express their own values relating to the object, for example, of HIV, but these values are always in relation to and interaction with their social environment.

5.2.4 Subjects within activity

Within CHAT subjects are the individuals that come together to collectively work on the object of activity. Rather than moving in and out of different activities they are an integral ‘moment’ in the whole of an activity (Roth, 2014). Stetsenko (2012, p.149) describes human practices as ‘being enacted and carried out by human collectivities through unique contributions by individual participants who always act as social subjects’ (italics in original). It is the perspective of these individual subjects that is provided through analysis of an activity (Engeström and Sannino, 2010), which will be the volunteers within each charity in my study. These subjects have their own historicity and emotions, which interact with the activity and take a stance towards the object (Vianna et al., 2014). Engeström (1999c, p.25) defines historicity as ‘concrete historical analysis of the activities under investigation’ and argues that this definition allows an understanding of history that goes beyond an individual biography, but is not unmanageably general. In this study, historicity involves both the history of individual subjects and the interaction of this history with the current volunteering activity. Both
emotion and agency of subjects within CHAT are not considered an ‘inner state’, and emotions are understood within a CHAT perspective as revealing ‘the social nature of needs and desires as they are expressed in an activity system’ (Nardi, 2005, p.48).

TAS provides a framework that allows ‘the self’ to be conceptualised as an: ‘important agentive dimension within a profoundly social and relational view of human life and development’ (Stetsenko and Arievitch, 2004b, p.476). Following the subject-object dialectic that is at the root of CHAT, Williams et al. (2007, p.3) argue that the term subjectivity is more appropriate within this perspective than identity as it refers to ‘the particular, possibly chosen, aspect that a subject presents in relation to the object of activity.’ Through the subject’s projection of their perceived needs onto the object of activity, values have an integral role in ‘shaping subjectivities’ (Williams, 2011, p.279). In this study, the term subjectivity is used to refer to the stance of volunteers towards the object of the volunteering activity and their position within the system of this activity through which they work towards it. While volunteers and other subjects, such as paid staff, within the charity will be positioned differently in the division of labour, the concept of intersubjectivity will aid understanding of how these subjects coordinate their work on the object of volunteering activity (Williams et al., 2007) and create shared meanings and experiences (O’Donnell and Tharp, 2012). The multivoicedness of subjects will also help take into account the cultural diversity and dialogic interactions within the system of volunteering activity (Kagawa and Moro, 2009).

5.2.5 Practices

Chailkin (2011) claims that in empirical studies the activity concept as developed by Leontyev is used to address too many issues and argues that a practice concept should be separated from an activity concept. Edwards (2010, p.5) also focuses on practices rather than the activity system, but uses CHAT as a framework to include ‘the systems in which practices arise and change’. A distinction is made within my study
between the activity of volunteering and the practices of training. Practices are defined as occurring in institutional settings and being ‘knowledge-laden, imbued with cultural values and emotionally freighted by the motives of those who already act in them’ (Edwards, 2010, p.5). Conceptualising volunteer training as a practice is useful to encompass training in all its forms within this context, including organised group sessions, informal shadowing and self-directed learning. Training as a practice is therefore conceptualised as part of the wider volunteering activity.

5.3 Transformation

Learning in this study is conceptualised as a form of transformation, which transforms both the volunteer and their environment and is aimed at the object of an imagined future outcome (Stetsenko, 2014). This concept of learning is different to other theories of transformative learning (e.g. Meizrow, 1997) because the transformation is not just a cognitive process internal to the learner; it is mutually mediated and transformative to both the learner and their environment. The process of transformation within CHAT does not describe the linear movement from one static state to another. Rather it is an ongoing, dynamic process of change, with the agency of learners playing a key role (Engeström and Sannino, 2012). This process helps to describe more than learning within a context, and involves the Hegelian notion of dialectic contradictions to allow for movement and change.

In this thesis contradictions are defined as ‘historically accumulating’ (Engeström, 2009) in the sense that they do not just appear from nowhere but are developed within a specific cultural space over time. They are also intentionally worked on (Popper, 1940) but are not necessarily resolved as ‘they are endemic, expressions of change, and always reappear in new form’ (Roth, 2012, p.272). The notion of sublation from Hegel is particularly useful to describe this process of a ‘simultaneous disappearance and retaining of a contradiction’ (ibid., p.263). This study draws upon the concept of
contradictions to explain transformation, and therefore learning, of both individuals and their environment. This encompasses contradictions within the activity system, for example within the division of labour, and within what Roth (2012, p.263) describes as the ‘dialectic entity’ of knowledge. For example, the previous knowledge of volunteers may be negated by new knowledge constructed through the practices of training. This new knowledge is sublated into previous knowledge, creating a new form of knowledge; a process which both cancels and transcends (Roth, 2007b). Cole, (1996, p.285) describes this process of learning as re-mediation, where ‘the behaviour of the group and each individual within it’ is mediated in a ‘qualitatively new way’.

The dialectic conceptualisation of knowledge in this thesis is largely informed by the work of Stetsenko on TAS, due to the emphasis placed on values and activism, which are integral to the charity and voluntary environment. The following definition of knowledge is deemed particularly useful to this context:

[A] form of active transformative engagement (=meaningful activity) of people with their world – aimed at changing this world (including oneself), conducted in view of social goals and agendas, while making use of and contributing to culturally evolved cultural tools and practices. (Stetsenko and Arievitch, 2004a, p.60)

The thesis positions the concept of knowledge as a dialectical entity, containing previously separated components, such as formal and informal knowledge, and previous and new knowledge (Roth, 2012). The movement and contradictions involved in this dialectical entity will be conceptualised as the process of learning, which is manifested in transformative processes. It is argued that this process of transformation is vital to how learning is conceptualised within CHAT:

Not only do activity and consciousness co-exist, they are mutually supportive.[…] As we act, we gain knowledge, which affects our actions, which changes our knowledge, and so on. (Jonassen and Rohrer-Murphy, 1999, pp.64-5)

Therefore, rather than a cognitive process with a fixed outcome, learning is ‘a dynamic phenomenon stretched across people, places, and cultures’ (Roth, 2012, p.256).

Drawing upon a dialectic approach in this study aims to avoid separating the learning process into dichotomous categories such as informal and formal, as was outlined in
Chapter 2. This approach also aims to encompass both scientific concepts systematically taught through instruction and everyday concepts understood by experience (Vygotsky, 1987).

5.3.1 Individual and collective transformation

In the theory of TAS, the mutual transformation of the learner and their environment is conceptualised as a process of both individual and collective transformation (Vianna et al., 2014). In the thesis this process will help to explain how the learning of volunteers through practices of training has a transformational effect on the training group, the charity and their wider community.

TAS theorises that individual transformation takes place when learners act collaboratively on meaningful life pursuits towards an imagined outcome: ‘learning becomes personally transformative by providing tools for identity development and opening up new horizons for personal and social growth’ (Vianna and Stetsenko, 2011, p.319). Such cultural tools, including knowledge, are described as ‘transformative tools’, which enable individuals to participate in and contribute to social practices through which they become ‘unique individuals’ (ibid., p.317). This process of ‘becoming’ is central to individual transformation, as it is ongoing and in relation to the social world (Stetsenko, 2014). As learners are individually transformed, they transform their wider environment in a mutual process of collective, social transformation.

5.3.2 Expansive learning

Expansive learning describes the process of learning ‘what is not yet there’ and involves a widening of horizons and new possibilities (Engeström and Sannino, 2010, p.2). It is theorised to occur when subjects within an activity system are faced with historically accumulated contradictions that force them to individually question existing
practices. Through this process of questioning, subjects collectively create new knowledge and activity that transforms both themselves and the activity (Engeström, 2009a), in the form of individual and social transformation (Engeström, 1999c). This expansive learning cycle is described as a *re-orchestration* of the different voices that contradict and complement each other within the same collective activity system (Engeström, 2008). The cycle of expansive learning is conceptualised as a series of stages (Figure 4 in section 4.3), however Engeström (2008) states that this ‘ideal-typical model’ is unlikely to be found in empirical studies. Therefore, in this study the separate steps outlined in the cycle of expansive learning will not be specifically drawn upon, but rather what will be more helpful is the overall concept of subjects expanding their horizons and creating new possibilities by questioning existing practices and the status quo.

### 5.4 Summary

This chapter has outlined the main CHAT-informed concepts that formed the theoretical framework of this study. Following on from the outline of CHAT, including the theories of expansive learning and TAS, presented in Chapters 3 and 4, these concepts have been defined and justified in terms of their relevance to the research questions. Specifically, the activity of volunteering and practices of training have been theoretically defined, along with the concept of transformation as the process of learning within this activity. The next chapter outlines how the study was designed through the perspective of this framework, including data generation and analysis.
6. Methodology

6.1 Introduction

This chapter outlines the methodology used to answer the research questions posed in Chapter 1. Åsvoll (2014, p.294) argues that ‘the qualitative researcher approaches the subject with a framework (theory, ontology) and a set of questions (epistemology) that are examined in specific ways (methodology)’. I approached the subject of learning within volunteer training through the framework of CHAT with exploratory research questions that were answered through a multiple case study. It is acknowledged that researchers conducting qualitative research begin the process with philosophical assumptions, as well as their own worldviews and beliefs, and these considerations of historicity are also integral to a CHAT perspective. This chapter intends to make explicit the assumptions underlying this study and acknowledges how these assumptions influenced conducting the research (Creswell, 2007).

The research questions were developed through the perspective of CHAT, and therefore include certain assumptions taken from that theoretical framework, which was outlined in Chapter 5. Four main assumptions include that firstly, learning can take place within volunteer training in health and social charities. Secondly, learning is mediated by sociocultural aspects. Thirdly, learning is a social activity, which takes place within a specific social and cultural context. Fourthly, organisations are made up of practices, shaped and constructed by people, which can be observed and explored through dialogue. This epistemology justifies the qualitative methods selected for this study, including observation, focus groups and interviews, which are detailed in section 6.6.

This research explores the learning experiences of volunteers who are engaged in training practices within health and social care charities in England. A qualitative approach was deemed appropriate to explore the phenomenon of learning in a holistic way, within the temporal, historical, political, cultural, social and personal context
An exploratory approach was deemed appropriate to the aim of the research, as well as the sociocultural theoretical approach, due to its definition as:

[A] broad-ranging, purposive, systematic, prearranged undertaking designed to maximize the discovery of generalizations leading to description and understanding of an area of social or psychological life. (Stebbins, 2001, p.3)

An exploratory approach therefore enabled a systematic and rigorous way of looking for the new possibilities emerging from transformation. Yin (2003) argues that although exploratory research may not have specific propositions, it still needs a clear purpose and criteria for success. The purpose of this research was to explore the role of the charity environment in the learning of volunteers who are engaging in training practices within UK health and social care charities. The theoretical framework outlined in Chapter 5 was drawn upon to conceptualise learning as a form of transformation within this context. This study was conducted in line with the four elements of credibility for qualitative inquiry as identified by Patton (2015), which include: systematic in-depth fieldwork to generate high quality data; systematic and conscientious analysis of data; credibility of the inquirer; and justification for the value of qualitative inquiry. All four elements are discussed throughout this chapter.

The first section of this chapter has presented the research ontology and epistemology, which follows on from Chapters 3, 4 and 5, which provided the theoretical grounding of this study. The chapter goes on to justify the case study methodology and multiple qualitative research methods as ways that can provide an understanding of the multiple perspectives and voices of subjects involved in the volunteering activity and practices of training of interest to this study. Considerations of sampling, ethics, researcher positionality and data management will also be discussed. The approach to data analysis is presented in the following chapter.
6.2 Multiple case study

This research followed a case study methodology, which allowed for the preservation of multiple realities through the inclusion of different, and sometimes contradictory, views of what is happening within a particular situation (Stake, 1995). This methodology was also able to capture the complex interaction between individuals and groups (Cole, 2010), which is central to the theoretical framework. A useful definition of a case study for this thesis is provided by Simons who emphasises the inclusion of multiple perspectives, real life context and in-depth understanding:

Case study is an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, programme or system in a ‘real life’ context [...] The primary purpose is to generate in-depth understanding of a specific topic (as in a thesis), programme, policy, institution or system to generate knowledge and/or inform policy development, professional practice and civil or community action. (Simons, 2009, p.21)

The central position of the theoretical framework within this study and its influence on the research questions also made case study methodology more appropriate than an ethnographic or grounded theory approach as it focused what I was looking for within the data (Yin, 2003). Case study methodology is recommended for research that adopts an activity theory perspective because it provides an ‘extended, holistic view that allows for the contribution of multiple perspectives’ (Barab, Evans, and Baek, 2004, p.208). In this study, case study methodology allowed volunteer training to be examined within its real-life context (Yin, 2009), which aligned with the exploratory nature of this research. It also followed previous CHAT-informed studies, which focus on the subject-object dialectic and the contradictions and transformations integral to this relationship:

Who the relevant subject is and what its object/motives are can only be determined in the concrete analysis of concrete, real-life instants of human activity, that is, living praxis of people at work. (Roth and Radford, 2011, p.9)

A case study methodology was therefore selected over the interventionist approach led by (Engeström et al., 1996) described in Chapter 4. This follows previous CHAT-informed studies that have followed a case study methodology (e.g. Williams and
Wake, 2006) and those which have observed ‘complex human learning situations’ in natural settings (Yamagata-Lynch, 2010, p.24). For practical and ethical reasons, conducting interventions into the charities within this study would have also required more of their resources, such as staff time, which were already limited.

The aim of the case study methodology in this research was not scientific generalisation, but more particularisation: ‘to present a rich portrayal of a single setting to inform practice, establish the value of the case and/or add to knowledge of a specific topic’ (Simons, 2009, p.24). Another aim of the research was analytic generalisation, to expand and generalise theory (Yin, 2003). This follows previous studies underpinned by CHAT, for example, the case study design by Williams and Wake (2006) to investigate workplace mathematical practices. Williams and Wake (2006, p.319) justified the use of case study because the phenomenon they were investigating was ‘not readily distinguishable from its context’ and the limited number of units of analysis allowed for analytic, rather than statistical, generalisation.

In this thesis, in order to strengthen analytic generalisation a multiple case study design was followed. Multiple case studies are considered to produce more robust findings than single case studies (Yin, 2009) and help to specify the conditions under which learning within volunteer training may or may not occur (De Vaus, 2001), aiming to develop more sophisticated descriptions and more powerful explanations (Miles and Huberman, 1994). Multiple cases are also considered to be the ‘best resource for advancing our theories about the way the world works’ (ibid. p.207). Furthermore, it is important to highlight that the charity and voluntary sector is not homogenous (Macmillan, 2013; Milbourne, 2013) so presenting findings from multiple cases intended to offer broader applicability to similar situations. The multiple cases in this study did not intend to be comparative, but rather findings were synthesised across cases aiming to increase richness of data, gain a broader view of perspectives of learning experiences within volunteer training in different contexts, and deepen transferability of findings.
A case study protocol was developed to ensure each case study was conducted consistently to support reliability (De Vaus, 2001; Yin, 2012) and the systematic generation of data as outlined by Patton (2015) (see Appendix 1). I kept a research journal throughout the study to reflect on the research process and to encourage myself to be continually reflexive to support the credibility and rigor of the research (ibid.). This process of reflexivity also helped to make explicit my own interests and perspectives, which Hakim (2000) highlights as a weakness of case studies.

6.3 Defining the cases

A case is a specific, complex, ‘functioning thing’ (Stake, 1995, p.2). The unit of analysis in each case was the group of volunteers who were involved in training to deliver services, and the charitable organisation was the context of each case. Through the perspective of CHAT, this definition of the case allowed volunteering to be viewed as an activity, in the form of an activity system, which involved practices of training. Thinking about the cases as activity systems also helped to bind each case in an integrated, bounded system (ibid.). These boundaries helped to prevent the research from becoming too broad. Yin (2003) also advises that propositions or, in the case of exploratory research, the purpose, helps to identify relevant information to the case and avoids the impossible aim of covering ‘everything’. This is another reason why this thesis focused specifically on practices of training. Defining each case as a group of learners also intended to allow findings to be compared and contribute to previous, as well as future, research (ibid.).

The next section will outline the sampling criteria and selection methods for the cases and participants of the study.
6.4 Sample

The sampling strategy selected for this study was a purposive sample, which allowed the selection of participants that had relevant knowledge and insight into the phenomenon of learning within volunteer training (Patton, 2002). Purposive samples are considered to provide more depth than breadth (Cohen, Manion, and Morrison, 2011) and this strategy aligned with the study aim, which was analytic rather than scientific generalisation (Yin, 2003). This section outlines how this sampling strategy was applied to select the cases and the participants for the study.

6.4.1 Cases

Each case was selected for inclusion in the study as it was considered to contain certain qualities that made it instrumental in understanding learning in the context of volunteer training (Stake, 1995). This included the challenging cause that each charity addressed, the volunteer activities that involved directly supporting people using the services of each charity, and the initial and ongoing training available to volunteers. All cases were based in North West England as practically that allowed me to spend time in each case, building up trust and generating data within the available resources.

Stake (2006) argues that while four to ten cases are preferable for a multiple case study, there can be good reasons why fewer are chosen. In this study, three cases were chosen because this allowed for a richness and diversity between the cases, in size, issue and volunteer roles, whilst still being a realistic and manageable number within the scope of the study. Differences between cases helped to assess whether findings about learning in this context can be applicable to different contexts (De Vaus, 2001) and produce similar findings (Yin, 2003). Differences included training delivery, volunteer roles, charity focus and charity size. Examining how different systems enabled subjects to work towards similar objects of complex societal challenges, also strengthened the theoretical framework. As was outlined in section 6.2, the charity and voluntary sector is not homogenous and includes a wide range of voluntary and
community-based organisations (Milbourne, 2013). By focusing specifically on charitable organisations the sampling criteria could be met through publically available information, such as from the Charity Commission website.

The sample characteristics are shown in Table 1 (as previously referred to in Darley, 2016).

<table>
<thead>
<tr>
<th>Case number</th>
<th>Charity focus</th>
<th>Total number of volunteers (Charity Commission, 2014)</th>
<th>Charity size (Clark et al., 2012)</th>
<th>Volunteer roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS1</td>
<td>Stroke</td>
<td>5,388</td>
<td>Large: National</td>
<td>Variety of activities supporting stroke survivors including communication support, group support and ambassadors.</td>
</tr>
<tr>
<td>CS2</td>
<td>Sexual violence</td>
<td>50</td>
<td>Small: City-wide</td>
<td>Helpline and counselling</td>
</tr>
<tr>
<td>CS3</td>
<td>HIV</td>
<td>128</td>
<td>Medium: Regional</td>
<td>Variety of activities including facilitating group spaces, peer support and events.</td>
</tr>
</tbody>
</table>

6.4.2 Research participants

Within each case, two organised training sessions were observed, two staff members involved in training and six volunteers were interviewed, and one focus group ranging from three to seven volunteers was conducted. As is accepted in qualitative research, the sample was not wholly prespecified and evolved once the fieldwork began in the form of conceptually driven sequential sampling (Miles and Huberman, 1994).

The criteria for selecting participants, for both the volunteer focus groups and interviews, was that they were current volunteers at the charity and had participated in training. The amount of training and the length of volunteering time varied between participants to avoid what Miles and Huberman (1994, p.34) describe as ‘narrow sampling’, in order to obtain contrasting and comparative information to increase
understanding of the phenomenon of interest, which in this study was learning. A
variety of attributes were sought in each sample where possible, for example age and
gender. Selection did not aim to ensure representativeness (Stake, 1995), but was
based on the conditions of the research questions (Miles and Huberman, 1994).
Participants were primarily selected on the basis of increasing understanding of and
providing an opportunity to learn about the case (Stake, 1995), in the area of interest to
the research questions (see Appendix 2 for participant list).

Volunteers were selected for individual interviews from their contributions in the focus
groups, for example if they expressed particular experiences or problems during
training, or from conversations we had had during the observations. Six volunteers
were selected to interview from each case and this number was chosen by the
principles of sufficiency and saturation (Seidman, 2006). The principle of sufficiency
intends to include a range of participants so that others within the case but outside of
the sample can connect to the experiences within the sample (ibid.). This was achieved
to varying degrees within each case. In all cases, the length of time volunteers had
been involved in the charity and the roles they performed varied. In CS1 and CS3 there
was a mixture of genders and as a women only charity, the volunteers selected for CS2
were all female. In CS2 and CS3 there were a range of ages, however in CS1 all
volunteers interviewed were over 50 years old.

Two staff members involved in volunteer training from each charity were interviewed
and in all cases this included some or all of the staff involved in the observed training
sessions. This was important as it allowed triangulation of their interviews with my own
interpretations of the observations, as well as the volunteer interviews. Two participants
was deemed a satisfactory number for staff interviews as in all cases this provided
sufficient information and context on training for volunteers within the charity. As the
research questions directly address the experiences of volunteers, it was deemed
appropriate to spend more time interviewing and generating data from a higher number
of volunteers, rather than staff. Purposes of the staff interviews were to provide a
context for the training that volunteers talked about and to hear their perspectives on training from their position as staff members. Gaining these perspectives also enabled the identification of potential contradictions with the perspectives of volunteers.

As the staff members interviewed were responsible for volunteer training it was possible that these participants would want to answer in a way that put themselves and the organisation in a good light (Tuckman, 1999). Furthermore, as the staff members knew about my research it is possible that they provided me with the answers they thought I wanted to hear (ibid.). Both of these potential issues were addressed at the beginning of the interview when I clarified what the data would be used for, that findings would be anonymous, and encouraged the staff member to give their honest opinion. I also stressed at the beginning of all interviews that the research was not evaluative and I was not judging the training as good or bad, which I felt put the staff members at ease. I had met and spoken with all staff members interviewed on a number of occasions before formally interviewing them, to discuss my research, and to arrange observing and participating in a training session. I felt this helped build up a rapport with all staff so that they felt comfortable talking to me in the interview.

As this was a purposive sample it was the decision of staff and volunteers to participate in the research. It is likely that the volunteers who participated had more of an interest and possibly more positive experiences in training than those who did not participate. However, identifying and exploring experiences of training across multiple charities, which have different qualities (e.g. size, cause, activities), aimed to address this limitation.

6.5 Access to the research sites

When researching into any organisation trust needs to be developed between the organisation and the researcher. This is particularly true for charitable organisations that deal with vulnerable people and sensitive issues. Furthermore, within the
framework of CHAT, familiarisation with the culture being studied is important and Scribner (1997, p.358) acknowledges the difficulties of researching ‘the conditions of work in an unfamiliar culture’. The cases in this thesis were chosen through strict criteria, but were also organisations I had personal contact with as a volunteer myself and was therefore familiar. CS2 and CS3 were both organisations I had volunteered within for the last three years, and I was put in contact with CS1 by my main contact in CS3. By volunteering within all organisations I gained experience and knowledge of the training they provided to their volunteers so I was confident that they met my sample criteria. My experience within each case is detailed further in section 6.6.2.

My main staff contact within each case acted like a ‘gatekeeper’ who facilitated my access to participants and documents for the study (Cohen et al., 2011). This relationship was vital to the study and enabled me to arrange training observations and recruit research participants. For example, my main staff contact advertised the focus group on my behalf to all volunteers within their charity via email, leaflets and, in CS1 and CS3, via social media (see example of email in Appendix 3).

As this was a qualitative study myself, as the researcher, is included as a research instrument (Patton, 2015). My experience and knowledge as a volunteer within all cases, and my perspective and ‘stance’ were useful tools for the study in terms of gaining access to the research sites, understanding and being familiar with the charity environment and gaining the trust of research participants. However, to support the credibility and rigor of findings it was important that a process of reflexivity took place throughout the study to encourage a questioning of how my own experiences and knowledge influenced what I found and reported in the study (Patton, 2015) (see Appendix 4).
6.6 Methods of data generation

Learning was conceptualised in this study as an interaction between an individual and their environment, meaning that the experience of learning would be different and unique to each individual (e.g. Vygotsky, 1994). Therefore, methods for generating data within this study needed to encompass different perspectives and voices, and thus needed to provide in-depth detail and direct quotes from participants (Creswell, 2007). Previous CHAT studies show that contradictions cannot be observed directly (Engeström and Sannino, 2010), however purely relying on interviews risks neglecting 'joint-mediated activity' (Cole, 2010, p.364). Therefore, multiple methods were used in this study, which also intended to triangulate results and increase trustworthiness and credibility (Bryman, 2012).

Epistemologically, this situation requires close contact with participants in their natural environment (Creswell, 2007). Following a case study design, methods were selected that provided thick description, experiential understanding and multiple realities (Stake, 1995). These methods included observations, interviews and focus groups, which intended to capture the perspectives of individual subjects on the object of activity and their possible conflicting interpretations (Holland and Reeves, 1994). The use of interviews and focus groups intended to construct the activity of volunteering and the practices of training through the 'eyes and interpretations' of multiple members of the activity (Engeström and Miettinen 1999, p.10) and helped to identify the object of activity in each case (Foot, 2002).

Data generation was initially planned for a period of three months for each case to be carried out sequentially for practical purposes. However, due to availability of participants and changes in training dates in CS1 and CS3, time for data collection was extended in these cases (see Appendix 19 for timetable). Participant information sheets were sent in advance to all participants and then discussed face-to-face prior to each method being conducted in order to ensure informed consent (ethical
considerations are discussed further in section 6.9). Immediately after conducting each method I wrote a reflective note in my research journal, including notes on the procedure, reflections on possible improvements, and reflections relating to the research questions (see Appendix 4).

Data were generated in each case through what Wolcott (2009, p.81) describes as 'experiencing, enquiring and examining'. Experiencing involved my own experience as a volunteer within each charity, observations of training sessions and my reflections throughout the research process. Enquiring involved conducting interviews with staff members and volunteers and a focus group in each case. Examining involved relevant documents sourced from various sources within each charity. Each of these stages will be explained and justified in the following sections.

### 6.6.1 Experiencing

Experiencing the charity environment within which volunteers were training and where they performed their volunteering activity was important in understanding the complex interactions and qualitative changes that occurred through these interactions within the activity (Cole, 2010). The process of experiencing came from volunteering within each charity, observing organised training sessions and reflecting on my own experience as a volunteer in each case and reflecting throughout the data generation and analysis process. I volunteered at CS2 and CS3 before starting this study and continued as a helpline volunteer and event volunteer respectively throughout the data generation process. At the beginning of my research, I had been put in touch with CS1 through my main contact at CS3 and became a communication support volunteer for this charity. I volunteered within each charity for approximately three hours at a time, on average once a month, and I also attended volunteer meetings and conferences (see Appendix 4 for reflections on these activities).
As a volunteer within the charities in the study, I brought certain experiences, values and assumptions to the research, which Creswell (2007) describes as axiological assumptions. This section intends to make these assumptions explicit and explain how they were managed during the research. However in this study, within the CHAT perspective, the idea of being an either ‘insider’ or ‘outsider’ researcher is rejected due to the static nature of identity within and binary conception of these terms (Thomson and Gunter, 2011). Instead, I positioned myself alongside the other subjects within the charities, with my own historicity of volunteering that was an integral part of my interactions within the charity and with the research participants. I used my research journal throughout the process of data generation and analysis to reflect on my own historicity and how that impacted on my decisions and interpretation of data. For example, a note from my research journal in October 2014 brings together a theme emerging prominently during data generation with my own experience as a volunteer in CS2 and also the theoretical framework:

The theme of sharing experiences – in training and in volunteering – that are deep and challenging. You can make very close bonds with other volunteers just in that moment. Just thinking about my own experience on the helpline – doing a shift just once with another volunteer you do create a bond even in just three hours. (Research journal note)

Drawing upon a theoretical framework throughout the study was useful in critically and systematically positioning my experiences and interpretations.

The personal involvement of the researcher has been seen as a limitation in case study research, however Simons (2009) argues that as long as this is appropriately monitored this personal involvement is essential to understanding and interpreting the case. I felt that my position as a volunteer within the charities studied enhanced the ability of the research to gain an emic perspective (Hancock and Algozzine, 2011). Spending time volunteering and being in the charities also increased my understanding of the environment I was studying, providing the opportunity for an ongoing interpretive role, which Stake (1995) argues is central to qualitative case studies.
**6.6.1.1 Observations**

Wolcott (2009, p.85) describes participant observation as being ‘at the heart’ of qualitative inquiry. The aim of conducting observations in this study was to observe the practices of training and the charity environment that I was questioning participants about within the interviews and focus groups, and to gain a full understanding of the complex situation (Patton, 2002). It was also important to observe training sessions with the focus of this research in mind, rather than relying on my personal experience of attending training as a volunteer in all cases. Observation enabled me to experience the training sessions, record information as it happened and notice any unusual or contradictory aspects (Creswell, 2009). Noticing contradictions within the practice of training was particularly relevant to the theoretical framework outlined in Chapter 5 and would help answer RQ2. In all cases, I took notes during observation and wrote them up immediately afterwards. Observation took place in two face-to-face training sessions in each case and focused on observing the trainers leading the training session. Focusing specifically on the trainers, rather than the group of volunteers, helped to ensure comparability of cases (Miles and Huberman, 1994). Multiple observations within the same case also aimed to generate more reliable data (Cohen *et al.*, 2011).

Training sessions within each case were selected for observation if they: involved volunteers; were organised and delivered by the charity within the charity’s premises; and aimed to support volunteers perform a service-providing role within the charity. As the observations had the potential to be disruptive to the training session, I discussed and arranged the selection of training sessions with my main staff contact at each charity. These types of organised group training sessions were not the only training to take place in each charity, and in the focus groups and interviews both staff and volunteers talked about other modes of training, such as shadowing. However, it was mainly for ethical reasons that I chose to observe the organised training sessions. No service users were present at this training, whereas if I had been observing volunteers, for example, being shadowed in their role they would have been directly dealing with
service users. Observation of the training sessions was the first data generation method conducted in order to provide a context for what I would be discussing in the focus group and interviews. However, volunteers did mention specific sessions when I interviewed them, such as the CS1 volunteers who talked about the blood pressure training and the law session in CS2. It would have been useful to observe these sessions as they appeared to be very meaningful for the volunteers. However, I had to arrange the observations around the schedules and preferences of the staff members, which limited to some extent the choice I had of which training sessions to observe. Initially I intended my role to be an ‘inactive and known’ non-participatory observer to limit my impact as a researcher on the training session (Newby, 2010, p.367). However, the method needed to be flexible to fit in with each trainer’s preference, which, except for one session in CS3, was for me to act as an active and known participatory observer. Overall I deemed it of most importance for the trainers, and the volunteers within the session, to feel as comfortable as possible and followed their preference for how I would least disrupt the training session.

6.6.1.2 Observation schedule

The purpose of observation is ‘to take the reader into the setting that was observed’ (Patton, 2002, p.23). It was therefore important for the data generated through this method to have depth and detail, and be descriptive. In a pilot study prior to data generation, I tested the method of observation in CS3 using the activity theory eight-step model (Mwanza, 2002) as a framework for observation. Drawing upon this framework helped prepare me for the observation, which is essential to the method (Patton, 2002, p.261), and this framework follows the CHAT perspective as it addresses the multiple aspects within an activity system. However, after piloting I decided this framework was more restrictive than helpful and it only generated a limited
description. Therefore, I decided not to proceed with this framework and instead used the following more general observation guiding prompts:

1. Participants and setting?
2. Individual conducting observation?
3. Role of observer? (Participant, non-participant)
4. Time, place, length of observation?
5. Descriptive observations?
6. Reflections?

(From Hancock and Algozzine, 2006, p.54)

These questions provided a structure and focus, but also allowed a rich description of the training and the environment.

6.6.2 Enquiring

The previous section explained how data were generated through ‘experiencing’ (Wolcott, 2009), which involved my own experience as a volunteer within the cases and participatory observations of training sessions. This section explains how data was generated through ‘enquiring’ (ibid.), which involved focus groups and interviews with volunteers, and interviews with staff members.

6.6.2.1 Focus groups

Focus groups are considered a useful method to ‘provide information about a range of ideas and feelings that individuals have about certain issues, as well as illuminating the differences in perspective between groups of individuals’ (Rabiee, 2004, p.656). The aim of using focus groups was to generate a diversity of experiences and to encourage interaction between participants. In particular, focus groups were seen as a useful method for eliciting the multiple voices and dialogue within a system of activity (Engeström, 2001).
One focus group was held in each case for volunteers to discuss their experiences of and opinions on training. Each focus group took place in the training room within each charity and lasted between one and two hours. All volunteers who had participated in training within the charity were invited to attend, and the aim was to bring together a homogenous group who had similar experiences of training within the charity (Patton, 2002). Following guidance from Morgan (1997) the focus group aimed to include six to ten volunteers. Attendance was low, however, for the CS1 focus group, which included only three participants. Attempts to run a second focus group did not gain any further participants. The focus group for CS3 was similarly small and included four participants. A contributing factor to these low participation rates may have been my reliance on charity staff members to pass messages and reminders on to volunteers, as staff members were so busy already. Another problem was articulated by Klara, a staff member in CS2, as she described the challenges of getting volunteers more involved in delivering training: ‘it’s always going to be an extra and people who are volunteering are already giving extra.’ Attending my focus group would be another demand on the time of volunteers. Therefore, I tried to make it as convenient as possible for volunteers to participate in the research, by arranging the focus groups and interviews around their preferences.

Despite the low attendance, data from both CS1 and CS3 focus groups were deemed useful. Smaller focus groups are recognised for being more advantageous when expanded answers and comments are sought (Morgan, 1998) and are useful when the focus is on what is said rather than on who says it (Bryman 2008). The focus group for CS2 involved seven participants. The timing of this focus group may have contributed to the higher turn out as it was scheduled immediately after the final helpline training session. During the focus groups I made notes about body language and other impressions to accompany the audio recording (Barbour and Kitzinger, 1998). The focus groups were voice recorded with the permission of participants and a transcript was written up afterwards.
6.6.2.2 Focus group schedule

Each focus group followed the same schedule, which contained questions and prompts to stimulate discussion (Gilbert and Stoneman, 2016). During the focus groups the main questions from the schedule were displayed on flip chart paper. The main discussion topics for the focus groups were informed by the theoretical framework and included:

a. Historicity of subjects: Training volunteers had participated in, reasons for participation and any previous relevant knowledge.
b. Multiple voices: Thoughts about training, experience of any challenges, any proposed changes to training.
c. Potential transformation: Possible impacts of training on the volunteering activity and beyond the charity.
d. Imagination: Future training needs or other resources to help volunteers perform their activity.
(See Appendix 5 for full schedule)

The aim of the discussion topics was to gain an insight into the perspective of volunteers on training within the charity and to identify any experiences of possible contradictions, and personal and social transformation. At the end of each focus group volunteers were invited to share any other comments that had not yet been discussed, but that might have arisen through the group discussion. I was able to use material gathered from the observations to prompt further discussion, which also helped check my interpretations from the observations.

6.6.2.3 Interviews

Interviews with staff were conducted at the beginning of the data generation process and interviews with volunteers were conducted following the focus groups. The interview method assumes that the perspective of others is meaningful, knowable and able to be made explicit (Patton, 2002), which aligns with the epistemology of this study, outlined in section 6.1. Interviews are described as ‘the main road to multiple realities’
(Stake, 1995, p.64) and were selected as a method because they enable an understanding of ‘the lived experience of other people and the meaning they make of that experience’ (Seidman, 2006, p.9).

Where possible, interviews took place at the charity premises in a quiet private room because it was a place where participants felt comfortable. A small number of volunteers across the cases preferred to meet outside of the charity, in a public place as this fitted in better with their location and schedule. Interviews lasted between 40 minutes to an hour and a half. During the interviews I used a friendly tone and words to make participants feel comfortable, avoided any academic jargon (Newby, 2010) and asked for clarification on anything that was unclear (Seidman, 2006). Each interview was recorded and transcribed verbatim, and I also made notes during each interview to capture main points that were later referred to during analysis. These notes also captured non-verbal information, such as tone, emphases, pauses and laughter (Cohen et al., 2011). It was important that the emotional content, which is central to CHAT, was not lost through transcription. During both the data generation method and the transcription process I noted any features such as laughter, emphasis or gestures that accompanied what participants were saying. I also listened back to the audio recordings of data during the analysis process to note any emotional emphasis. Original recordings were kept securely and referred to during analysis in order to preserve the ‘oral discourse unfolding over time, face to face, in a lived situation’ (Kvale, 1996a, p.280) and to avoid the loss of this through transcription.

The interview method has been considered as being prone to subjectivity and bias from the researcher (Cohen, Manion and Morrison, 2000). However, within the theoretical framework of this study, interview data were considered to be a co-construction between myself as the researcher and the research participant. My active engagement within the interviews was, as Stetsenko (2014, p.194) describes, infused with my subjectivity of: ‘goals, hopes, expectations, beliefs, biases, and commitments’. Through this perspective my subjectivity could not be avoided, but it was managed by consulting
each participant after the interview to ensure the transcript and my interpretation reflected what had been discussed (Smythe and Murray, 2000) as a way of member checking (Robson, 2011). Only a few participants slightly altered the notes I sent them.

6.6.2.4 Interview protocol

All interviews were semi-structured and followed the same interview protocol to address issues around data reliability and bias that can arise from the flexibility of semi-structured interviews (Robson, 2011). The interview protocol provided guidance, and structured questions enabled comparisons to be made across the different cases (Cohen et al., 2011). This structure also aimed to reduce the possibility that conclusions were influenced by ‘qualitative differences in the depth and breadth of information received from different people’ (Patton, 2002, p.347). Furthermore, the same questions ensured that the same basic lines of enquiry were pursued with each participant and helped make the most of the limited time available within each interview (ibid.). As I was aware of what I wanted to focus on in the research an unstructured interview would have been less appropriate (ibid.).

The interview protocols were slightly adapted to each case, but all contained four main areas, informed by the theoretical framework:

For volunteer interviews

1. Practices of training: Perspectives of training, tools and motivations.
2. Historicity: Previous knowledge or experiences and identification of any possible tensions or contradictions.
3. Mediating tools available within training: Resources that had supported learning.
4. Potential transformation: Qualitative changes, including self-perception and changes in practices.
   (See Appendix 6 for full protocol)

For staff interviews

1. Division of labour: How training is made available for both staff and volunteers.
4. Potential transformation: Perceived or intended outcome of training for volunteers, the charity and wider environment.

(See Appendix 7 for full protocol)

The interview protocol for both staff and volunteers involved the key characteristics set out by Kvale (1996a) including: using natural language (gained through my experience as a volunteer in the charity); descriptive questions that aimed to elicit descriptions of specific situations and actions, focused on specific ideas and themes; and flexibility to allow for openness to new data and phenomena. There were a limited number of prompts to minimise interviewer interaction and to encourage the participant to speak in their own voice (Mishler, 1986). The interview protocol included questions and issues to be addressed in the interview but also allowed for necessary probes and the freedom to explore (Patton, 2002). In this study the freedom to probe deeper into answers was important to capture unanticipated areas and it also allowed space for the unique experiences of each participant (Stake, 1995).

6.6.3 Examining

The previous section explained methods used to enquire into the research setting, including focus groups and interviews. This section focuses on the stage of examining, which refers to the ‘examination of materials made by others’ (Wolcott, 2009, p.82). In this study these materials were charity documents including: training materials, volunteer handbooks, policy documents, web pages, and volunteer role descriptions. Examination of these documents intended to provide data on context, culture and history in order to enhance the understanding of each case (De Vaus, 2001), and was also appropriate to the theoretical framework. Documents provided another perspective of the external face of each charity and its relationship with and expectations of volunteers.
The questions outlined by Clark (1967 in Handcock and Algozzine, 2011) helped to check the authenticity of documents that were examined (see Appendix 8). Only documents that were publically available, or that were approved for my research study, were drawn upon to avoid any ethical concerns over sensitive or confidential information.

6.7 Data Management

This chapter has so far explained the approach and specific methods used to generate data for this study. This section will outline the management of this data.

During data generation, all notes and transcripts were typed up and organised using digital folders so they were easily retrievable during analysis (Merriam, 1998) and could be securely backed up (Miles and Huberman, 1994). The software Nvivo was used in this study to help manage data generated and was also used as a tool in the analysis process. All data generated within the study was stored in Nvivo, including audio files, documents and transcripts (see Appendix 9). These practices helped to avoid data overload and manage the large amount of data commonly collected in case studies (Hancock and Algozzine, 2011). Furthermore, Nvivo provided a useful place to keep an audit trail to detail and justify data collection (Merriam, 1998) and support the sincerity and transparency of the research (Tracy, 2010). This audit trail included, for example, all generated data, notes and reflections following methods of data generation and also during data analysis.

Text was the main data for analysis, although within Nvivo the corresponding audio file could easily be accessed to check emphasis, which enabled increased ‘closeness’ to my data (Lewins and Silver, 2007). It also proved to be more efficient to be able to quickly and easily retrieve all data from one place, rather than viewing data in separate Word documents.
6.8 Preliminary studies

Preliminary studies help to identify problems within the research design, including research methods and analysis, which can be addressed before starting the main research. For case studies, Yin (2003) claims such preliminary, or pilot, studies specifically help to refine the data collection, including the content of the data and procedures to be followed. During my MSc in Educational Research, which I completed the year before beginning this thesis, I had the opportunity to trial data generation methods at CS2. This involved interviews with staff and volunteers and observations of training, which helped me test out instruments and explore the topic area. These pilot studies also allowed me to become more familiar with the ethical approval process, gaining informed consent from participants and generally managing the researcher and participant relationship.

During this MSc I also piloted an analysis of interview data drawing upon a theoretical framework. Although this framework was Communities of Practice (Wenger, 1998) and not CHAT, the pilot provided me with experience of creating clear definitions of concepts, systematically drawing upon these concepts to interpret data and justifying the use of these concepts in the analysis process. This process was also a useful lesson in avoiding a restrictive coding process. Initial ideas and plans for the research were shared and discussed in years 1 and 2 of my PhD with a variety of audiences in order to get feedback, clarify my thinking and expand and improve on my theoretical knowledge. I presented at various education and voluntary sector conferences, attended research methods and CHAT workshops (see Appendix 10) and participated in the University of Manchester Social Theories of Learning course. Participating in and conversations from all these activities contributed to the planning, implementation and reflection on this research study.

In case study methodology, piloting can also be incorporated into the study itself (Robson, 2011). Reflection on each data generation method and reflexivity throughout
the study contributed to improving instruments and procedures as the study progressed. For example, during the first staff interview in CS1 I realised that the last interview question, which addressed the challenges of training volunteers, could end the interview on a negative note. During this interview I asked a question following this one to avoid finishing on a negative point and then included this extra question in future staff interviews.

6.9 Ethical considerations

This chapter has so far explained the development, approach and methods used to generate data for this study and how data was managed. This section will discuss the ethical considerations that were an integral aspect of every stage of the research process.

There was a particular moment in an interview in CS2 that emphasised the meaning of ethics in the context of my study. The volunteer, who in her interview had disclosed that she had personally experienced sexual violence, was talking about a helpline call she had recently received:

This one caller was saying how she’d finally told her husband what had happened to her and he said I’ve lost all respect for you or something. And I was thinking how bloody lucky am I – it was kind of like a [snaps fingers] oh shit that actually still happens! I’ve like created a world for myself now where I can openly talk about sexual violence and also with people that I trust about what happened to me as well. (Helpline volunteer, CS2)

The ‘world’ the volunteer mentions here is the environment of the charity, which was a place where she, and others with similar experiences, felt safe and confident to talk about their personal experiences. CS1 and CS3 also created the same supportive environment, where there was generally a shared understanding and viewpoint about the cause of each charity. The majority of data generation methods took place within the charities, except for a few interviews, so it was likely that volunteers felt they were still in the safe environment where they felt able to share their personal experiences.
Most of the volunteers had also met me before, during training observations and volunteering within the charity, so may have felt they knew me and could trust me.

In this situation informed consent, which Howe and Moses (1999, p.24) describe as ‘the most central’ of ethical principles, was vital to ensure participants had full information about the study, what their role would be, how the information would be used and that participation was voluntary. This information was provided in written format in the Participant Information sheet (PIS) (see Appendix 11), which was emailed to participants in advance of taking part in the study. Information contained in the PIS was also discussed in person with each participant to provide further clarification and to answer any potential questions before commencing the observation, focus group or interview. Participants in the study were all adults and were deemed capable of granting their own consent to participate in the research.

Confidentiality and anonymity were important factors to protect the identity of participants and charities. I only included personal experiences in the data if I felt that they were relevant to my research questions and that the experience was not highly sensitive. For example, the experiences of stroke in CS1 were talked about very openly and within the context of learning, so these were included in the data. However, I have not used the pseudonym for the volunteer quoted at the beginning of this section from CS2, as this was deemed too sensitive to include in the data. At the start of each focus group I told participants that they were free to reveal their own personal experiences if they wanted to, but confidentiality could not be guaranteed in a group situation. Furthermore, I asked participants not to reveal experiences from anybody not present, for example other volunteers or service users, to avoid any breach of confidentiality. These initial procedures intended to address the ‘unique ethical issue’ in focus groups, which is ‘what participants tell the researcher is inherently shared with other group participants’ (Morgan, 1997, p.32).

Many volunteers said they would be happy for me to use their real names in the reporting of findings, but for reasons already outlined in this section and to protect their
identity, pseudonyms were used for all participants. Pseudonyms were not randomly chosen but were selected to match the age and ethnicity of participants (as outlined by Lahman et al., 2015). The use of pseudonyms and the removal of any identifying information, including the name of the charity, follows ethical guidelines from BERA (2011) and the University of Manchester (2013). The decision to use pseudonyms highlights the power relations between researcher and research participant, particularly within interviews (Cohen et al., 2011). These issues were addressed during the data analysis process through member checking and reporting back findings to the charities. Throughout the research study I continued dialogue and ongoing renegotiation with each charity to ensure voluntary, informed decisions (Miles and Huberman, 1994).

The considerations discussed so far are what Guillemin and Gillam (2004, p.263) describe as ‘ethics in practice’, the ‘everyday ethical issues that arise in the doing of research’. These authors also describe ‘procedural ethics’, which in my study involved submitting an application form and relevant documents to gain approval from the School Research Integrity Committee within my University. Olsen (2012, p.91) argues that, ‘ethical clearance has direct links with the development of the research design’ and completing this form was useful in clarifying my research design, sample and methods as well as ensuring my research met and was approved by ethical guidelines.

6.10 Summary

This chapter has explained the case study methodology that was selected for this study and justified the choice of following a multiple case study design. Data generation methods were outlined and justified, which followed the general approaches of experiencing, enquiring and examining. Considerations of sampling, ethics, researcher positionality and data management were also discussed. Overall, the methodology and methods chosen aimed to answer the research questions set out in Chapter 1, according to the ontology and epistemology of the theoretical framework outlined in
Chapter 5. The next chapter outlines the approach to data analysis, including both within and across case analysis.

7. Analysis and interpretation

7.1 Introduction

The previous chapter explained the approach and methods used to generate data for this study. This chapter presents how data were analysed in order to answer the research questions. It also discusses the challenge of systematically analysing data through a dialectical theoretical framework. To address this challenge, a distinction is made between the systematic examination of data through analysis, which includes the process of coding, and the more reflective, intuitive process of interpretation (Wolcott, 2009).

Analysis and interpretation of data took place throughout data generation, following a continuous, iterative process (Miles and Huberman, 1994) common to the case study methodology (Handcock and Algozzine, 2011). Analysis intended to provide rich, thick description in order to provide transferable findings (Merriam, 1998). Following the general aim of qualitative data analysis, the intention was to ‘move from description to explanation and theory generation’ (Cohen et al., 2011, p.539) and to enable this process the analysis was organised in the following way:

1. Detailed descriptive account of each case (presented in Chapter 8)
2. Identifying themes that cut across the data (presented in Chapter 9)
3. Linking these themes together to make inferences and develop theory (presented in Chapter 10)

(From Merriam, 1998)
Overall, the analysis process intended to create new meanings through ‘direct interpretation of the individual instance and through aggregation of instances until something can be said about them as a class’ (Stake, 1995, p.74).

This chapter begins by outlining the general analytic approach of abduction and will go on to discuss in detail the practical stages of both within-case and cross-case analysis.

### 7.2 Approach to data analysis

In order to answer the research questions the process of abduction was drawn upon, which refers to: ‘the process of moving from everyday descriptions of the social world to social scientific descriptions and analyses of it’ (Vogt, 2005, p.1). Brinkman (2014, p.722) argues that abduction avoids a simplistic and restrictive relationship between data and theory, and concerns ‘the relationship between a situation and inquiry’ (italics in original). For the analysis of my data, I followed three stages as outlined by Åsvoll (2014, p.293), which include: looking for surprising ideas within the data, then looking for explanations; testing new ideas that come out of this process by drawing upon the theoretical framework; and returning to the data with these new explanations to ensure they had sufficient empirical basis. Each of these stages is outlined in further detail in the following sections. Although explained sequentially, these stages are not individual components but intend to be ‘mutually interdependent in scientific investigations’ (ibid.).

This approach allowed the incorporation of the theoretical framework in a way that rigorously tested it. Analysis was therefore guided by the theoretical framework or ‘theoretical orientation’ as defined by Yin (2003) who advises to use the original theoretical propositions to focus analysis. For example, by being sensitive to possible contradictions I paid particular attention to what Engeström and Sannino (2011, p.372) describe as ‘discursive manifestations of contradictions’ within the data. These manifestations include expressions such as ‘but’ and ‘we/I have to’, which can be seen
in the extract below from David in CS1 as he discussed information he saw as being ‘withheld’ from him because of his position as a volunteer:

That makes it difficult. **But** you are not going to be party to all information. **You have to** accept that. (David, CS1) (my emphasis)

Within analysis this example was highlighted as a potential contradiction within the division of labour. Drawing upon the theoretical framework to identify such contradictions was useful because it identified potential areas of transformation to explore in further detail.

The process of abduction intends to avoid the theoretical framework becoming a self-fulfilling prophecy (Mills and Bettis, 2006) and allows the incorporation of new ideas, as well ideas from CHAT. In this study, the theoretical framework is used as a lens to ask interesting and relevant questions and to sensitize me to certain points in the data for both agreement and resistance. In this way, Mills and Bettis (2006, p. 83) describe the theoretical framework as directing the study in two directions: ‘both toward and away from the perceptions and concepts of the framework’, which enables analysis to ‘go beyond what our frameworks provide us’. The testing of ‘rival explanations’ (Yin, 2003, p.111) and deliberately identifying, ‘disconfirming evidence’ (Miles and Huberman, 1994, p.246) is particularly important within case study design where the interpretation of data is the responsibility of the researcher (Åsvoll, 2014). This included questioning whether any identified transformational experiences would have happened without participation in training practices. For example, in his interview Noel in CS1 said he felt like he had brought the necessary skills into the charity with him, rather than learning them through practices of training. However, in the same interview Noel also talked about the knowledge he had gained about stroke through training and how this knowledge had been transformative for him within the charity and more widely.

This chapter outlines the general approach to analysis in the study, but it is important to note that the multiple methods used generated different types of data with particular considerations for analysis. For example, the interview data were co-constructed
between myself as the researcher and the participant, so it was important to include my own questions and interjections in the analysis process. Furthermore, Krueger and Casey (2015, p.143) warn against the danger of micro-analysing comments in a focus group that are ‘simply a characteristic of a discussion’. They provide the example of a minor point being over emphasised because the participant feels the group is dismissing or ignoring it. To address this potential issue, where possible, I followed up individual contributions to the focus group in individual interviews.

This section has explained the general approach to analysis taken in this study. The following sections detail the processes of analysis undertaken within this approach.

7.3 New ideas and explanations

The first stage of the abductive approach as outlined by Åsvoll (2014), involved looking for surprising ideas within the data and then looking for explanations. A vital part of this initial process was becoming familiar with the data, which took place from the very beginning of data generation. I wrote reflections in my research journal after each method of data generation, and throughout the transcription process (see Appendix 4). 

Transcription itself is viewed as being an early stage of analysis because data is changed from ‘a social encounter’ to ‘a record of data’ (Cohen et al., 2011, p.426). I completed a verbatim transcription of the audio recordings following each method when the encounter was fresh in my mind. Transcribing immediately also helped me keep up to date with the transcription process and ensured efficient data management. The process of member checking was also part of early analysis, because the notes I sent to participants were organised under different subheadings, which reflected emerging themes.

I wanted to avoid coding my data too early in the analysis process and, following the abductive approach, I firstly wanted to highlight interesting or surprising things in the data. Taking each case study, every individual file of data was read a number of times
in order to ‘get a sense of the whole’ (Tesch 1990, p.142) and initial ideas were noted using the annotation tool in Nvivo, which embedded comments in the data (see Appendix 12). For each piece of data I created a memo to include the most salient points that I was thinking of during annotation. These notes included repetitions or aspects of particular prominence to the research questions. Reading and annotating the data, I noticed not only points of interest (e.g. informal assessment during training) but also what this seemed to relate to (e.g. emotional challenges of the role). Therefore, during this early stage of analysis, I began to make initial connections within and across data sources. This process aimed to prevent the theoretical framework limiting the findings and at this stage I deliberately avoided the use of specific theoretical terms.

**7.4 Viewing new ideas through the theoretical framework**

Following the first stage of finding new ideas within the data, these ideas were then tested in a systematic and critical way, by drawing upon the theoretical framework to provide explanations. For example, any conflicts identified in the data were examined using the theoretical framework to assess whether they were manifestations of historically accumulating contradictions (Engeström, 2001). This stage was achieved through coding, which refers to ‘the process by which segments of data are identified as relating to, or being an example of, a more general idea, instance, theme or category’ (Lewins and Silver, 2007, p.81). The act of coding could be viewed as being in opposition to the dialectic approach of CHAT, where aspects of an activity system are viewed as being integral moments of an activity and not separate parts. However, ensuring a systematic and thorough analysis of the data was essential in ensuring a rigorous study (Tracey, 2010) and is considered the first step in the process of data reduction (Miles and Huberman, 1994). In my study coding helped to ‘guide attention’ during the analysis process (Stake, 1995, p.81) and identify relationships across the
data, including negative instances. Using Nvivo as a tool to code data was useful because it enabled coded data to be viewed within the interview text, thus preserving the context surrounding it (see example in Appendix 13).

A coding scheme was created by drawing upon the annotations and reflections outlined in section 7.3, as well as the theoretical framework. Coding was an iterative process that was altered and changed during the early stages of analysis, until the final coding scheme (in Appendix 14) was reached. The unit of analysis to code was two sentences maximum. Overlap in codes was avoided and one code was applied to each unit of analysis in order to create clearer concepts (Newby, 2010). It was useful to have a printed copy of the coding structure in front of me when I was coding using Nvivo to view all the codes and ensure I was applying the most appropriate one. Memos were written and saved in Nvivo to create a description and notes for each code, and to reflect on my reasons for applying the code (see Appendix 15). Once data had been coded for each case, a process of data interrogation was carried out to support validity. The matrix query tool was run in Nvivo to view data within each code for each case (see Appendix 16). During this process I also checked back with the original data source to ensure the context of the data was not being lost and I listened again to the audio recordings. I wrote reflections during the analysis process for each case and if there were similarities to another case I would note this in a footnote. This ensured it was included to follow up during the cross-case analysis, but that it did not influence individual case findings.

The next section explains how, following coding, data were analysed in context and an emphasis was placed on relationships between codes, not just the codes themselves. This process intended to make the theoretical framework enriching, rather than classificatory.
7.5 Developing themes

The previous section outlined how the process of coding allowed initial ideas and explanations taken from the data to be systematically viewed through the lens of the theoretical framework. Once coding had been completed, further analysis built upon these initial interpretations by examining data with the same codes and visually depicting the relationships between them using the model tool in Nvivo (see Appendix 20). Visually displaying data helped move into what Miles and Huberman (1994) describe as ‘conclusion drawing/verification’, as connections were made between themes. My reflections and notes made throughout the data generation process were also referred to at this point. Prominent themes emerged during the iterative process of coding with two main themes, transformation and emotion, emerging after coding the first few interviews and focus groups. As well as frequency, themes were identified through contrast or ‘external heterogeneity’ (Patton, 2002), distinctiveness and their relation to theory. Saturation in information was reached when no new themes were identified.

Once I had noted down themes from each case, I went back through them and narrowed down the themes, merging some themes with others. For example, in CS3 the theme of ‘boundaries’ was included under the theme of ‘unique position of volunteers’. In this process the major themes of each case emerged. The themes had slightly different prominence in the different cases and included:

- **Emotion**: feelings or ‘passions’ (Nardi, 2005) expressed towards volunteering activity.

- **Historicity**: history of individual subjects (including knowledge, experiences, perspectives) and the interaction of this history with the current volunteering activity.

- **Transformation**: The ongoing, dynamic process of change, for both learners and their environment.

- **The dynamic object**: The driving force of collaborative activity, including both ideal and material forms (Foot, 2002).
• **Unique position of volunteers:** The position of volunteers within the charity and their position or stance (Vianna *et al.*, 2014) towards the object of volunteering activity.

• **Values:** The principles that are part of the individual-social dialectic (Roth and Radford, 2011), which guide the meaningful life project (Vianna and Stetsenko, 2011) of subjects as they work towards 'a vision of how the world should be' (Stetsenko 2012, p.151) (italics in original).

When writing each within-case analysis, the major themes were reintegrated to show how they work together to provide explanatory power (Ayres, Kavanaugh, and Knafl, 2003).

### 7.6 Within-case analysis

This chapter has so far outlined the aim and approach of data analysis and interpretation. This section details the process of within-case analysis, which enabled me to gain a deep understanding of each case (Miles and Huberman, 1994) and become 'intimately familiar with each case as a stand alone entity' (Eisenhardt, 1989, p.18) before moving into cross-case analysis. As Eisenhardt, (1989) argues, this stage helped to identify unique patterns within each case before generalising patterns across all cases.

Each case was described in context, including the cultural and historical background of each charity. Within the theoretical framework, gaining an understanding of the cultural and historical background of the charity and the cause it addresses is fundamental to understanding the activity of volunteering and practices of training. Describing each case in rich detail aimed to enable readers to contextualise the findings, and thick description is also considered central to generating insight into the data (*ibid*.). Data that provided this description came from the charity documents outlined in section 6.6.4. Data from staff and volunteer interviews were also drawn upon to provide a background of each charity and its aims. It was important to describe how the charity was developed, which in each case involved volunteers, and the history of the cause.
each charity was addressing. The description of each case also provided a check against my analysis and interpretation (Wolcott, 2009).

A narrative description of one training session was presented in each case, which provided an illustration of training, including a description of the physical environment. Observation data and my own notes from the fieldwork were used to provide a ‘vicarious experience’ (Stake 1995, p.63) of both the charity environment and an example of training. The training session that provided the most useful example of a general training session that most volunteers in the charity would attend was selected. For example, the induction session was selected in CS1, the first training session out of eight sessions was selected in CS2 and update training was selected in CS3. In order to address the issue of consistency and retain contextual sensitivity within the data (Silverman, 2014), a short vignette of one participant from each case was provided at the beginning of each within-case analysis. These vignettes also aimed to address the challenge of working with a dialectical theoretical framework, by providing a detailed example in context and aimed to illustrate the prominent themes from each case according to the research questions.

Findings from the individual cases studies were shared with the charities involved in the research by a basic report (Appendix 17). To further explain these reports, I asked my main staff contact at each charity their preferred method in which I could share detailed findings with them. This approach intended to provide a way for staff to feel involved in the research, but in a way that took into account their limited resources and avoided burdening them with any extra activities. Therefore, research findings were distributed slightly differently in each case. CS1 preferred that I write a short article for their volunteering newsletter; CS2 asked me to attend a volunteers meeting and talk about the findings; CS3 were happy to receive the written report.

This section has outlined how cases were analysed and presented individually. The next section will outline how findings from the individual within-case analyses were synthesised across all cases.
7.7 Cross-case analysis

Following the within-case analyses that were explained in the previous section, the next stage was cross-case analysis, which involved identifying cross-cutting themes across all cases. It was important that these themes were exhaustive, mutually exclusive, sensitising and conceptually congruent (Merriam, 1998). This stage aimed to make inferences and develop theory by linking the themes from across the cases together in a meaningful way (ibid.). The aim of conducting a multiple case study was to synthesise findings across the cases to strengthen the thesis. Stake (2006) describes the main process of cross-case analysis as reading the individual case findings and then applying them to the research questions across all cases. This process was part of the more reflective, intuitive process of interpretation described by Wolcott (2009) and involved bringing prominent themes together, drawing upon the visualisation of each case as well as the within-case analyses. Three main themes were identified across all cases, which included dynamic object, subjectivity and transformation.

It was useful to examine the nuances between the cases and explain any differences as this process helped deepen understanding and explanation (Miles and Huberman, 1994). After writing an initial synthesis of the three cases I felt a matrix, as outlined by Miles and Huberman (1994), would prove useful in bringing out the nuances and differences between each case (see Appendix 18). I drew upon this matrix to assess the prominence and relationships of themes within each case. As Stake (2006) argues, studying what was similar and different about the cases increased understanding of the phenomenon of the study, which was the learning of volunteers within the practices of training.

Findings from the cross-case analysis were shared with the wider voluntary sector through presentations and papers submitted to conferences, talks at local community
meetings and a knowledge exchange event. Kvale (2007, p.125) describes this process as ‘audience validation’ and it provided a way of including different perspectives and feedback on the research throughout the analysis process.

7.8 Summary

This chapter has outlined the approach and processes involved in the within-case analyses and cross-case analysis. The general approach of abduction was explained as allowing a systematic interrogation of the data, as well as interpretation through the theoretical framework. The various stages of data analysis were detailed which included creating a coding schedule from both the data and theoretical framework and identifying wider themes drawing on visual data displays. The development of a deep understanding of each case through within-case analysis was explained, followed by how these understandings were synthesised across cases. The next chapter presents the findings from the within-case analyses.

8. Case Studies

8.1 Introduction

This chapter begins the presentation of the empirical findings analysed from the study. The main themes that relate to the research questions will be presented, which have been interpreted from the data and through the lens of the theoretical framework. The research questions will be more directly addressed in Chapter 10. As previously outlined in Chapter 5, in each case the object of activity is conceptualised as the force driving the collective activity forward, including the activist pursuits of individuals (Vianna and Stetsenko, 2011). For example, drawing on the German terms of the dual meaning of object: the Objekt of CS1 is the health condition of stroke, and the
*Gegenstand* is the motive to make the world better through improved conditions for stroke survivors and fewer strokes (from Nardi, 2005). The object meets a collective need and is transformed by the collective activity. The collective activity system of volunteering is analysed in each case within the community of the charity.

Each case is discussed separately through a within-case analysis and then the synthesis of findings from all cases will follow in Chapter 9. Each case will begin with a description of the charity, explaining its development and the role of volunteers. This introductory description intends to contribute to providing a full understanding of each case, which is the main objective of case study methodology (Stake, 1995). All cases are registered charities and are governed by a board of trustees, but the history of the cause of each individual charity and the development of each charity to address this cause through their values and priorities is an integral part of understanding each case. The introductory section of each case study will highlight the cultural-historical background of the cause each charity addresses as, within this study, the cause is considered to be the collective motivating force of the activity of volunteering.

Additionally, it is important to show the position of volunteers within each charity and their integral role in the development of the charity and how its work is implemented. Providing a rich description of the environment that volunteers are training within intends to contextualise the findings and contribute to answering the research questions.

A narrative account of training is provided after the history of each charity has been discussed. This narrative is taken from one of the training sessions I observed and intends to provide an example of training that volunteers participate in and the kind of knowledge and opportunities for learning that are made available to them. Finally, a vignette of one of the volunteers interviewed is presented, which aims to introduce some of the main themes from the findings, including historicity, values and transformation.
These preliminary descriptions intend to provide an intensive and holistic description of each case, which is of ‘paramount consideration in analysing the data’ (Merriam, 1998, p.193). They also intend to provide the reader with a ‘vicarious experience’, which contributes to the potential of ‘natural generalization’ and transferability of the findings to similar settings (Stake, 1995, p.86). Stake (1995, p.110) also argues that providing ‘a substantial body of uncontestable description’ provides readers with the opportunity to conduct their own triangulation of data, thus adding to the credibility of findings.

8.2 Case 1: ‘it’s there in every one of us’

8.2.1 Introduction

In this case (CS1) I interviewed staff members Gillian who was the volunteering advisor across England for the charity; and Eiliyah who was the regional volunteer support and training officer. Volunteers David, Keith and Glenn attended the focus group and I individually interviewed David, Carmel, Noel, Jerry, Hazel and Greg (see Appendix 2 for further information on participants).

8.2.2 History and Culture

CS1 is a national charity that works on a regional basis to provide a range of services to support people affected by stroke. It campaigns for better services for stroke survivors and also funds research into stroke and rehabilitation. A stroke occurs either when a blockage cuts off the blood supply to the brain, or when a blood vessel bursts on or within the surface of the brain. Statistics released by the charity state that a stroke occurs every 3 minutes and 27 seconds in the UK and that the country has 1.2 million stroke survivors. Stroke is the fourth leading cause of mortality in the UK and often results in impairments to physical functions such as walking, balance, speech,
bladder and bowel control. Further effects of stroke can also include depression, social isolation, family breakdown and financial hardship.

Officially the charity was established over 100 years ago in 1898 and originally focused on tuberculosis. However, it was in the 1970s that the charity began to concentrate on stroke after an amateur speech therapist pioneered a scheme using volunteers to support stroke survivors with communication difficulties. Her idea was that volunteers could enhance the work of speech therapists who were limited in the time they could spend with each patient. Volunteers continue to make up a large part of the charity today with 4,000 volunteers working alongside 649 paid staff. Since the 1980s, campaigning for better stroke services in hospitals, raising awareness and educating the public about stroke have been central to the activities of the charity. In particular, the charity has campaigned to raise awareness that stroke is a preventable condition that does not just affect the elderly. Part of this awareness raising includes educating the public about transient ischemic attacks (TIAs), also described as ‘mini strokes’, which temporarily stop blood flow to the brain. Although symptoms of a TIA can disappear after 24 hours it is a warning sign that the person is likely to experience a future stroke and medical assistance should be sought immediately.

A wide range of volunteer roles support the activities of the charity, including: volunteers who support stroke survivors one-to-one and in groups, administration support, ambassadors who raise awareness of stroke to the public through presentations and events, fundraisers and volunteers who bring specialist skills into the charity. Descriptions of a range of volunteer roles are available from the website of the charity, and such descriptions include potential tasks and personal benefits, required skills, and provided support and training.

The website of the charity claims that volunteering has a huge impact on the services it can offer and what it can achieve, and this value placed on volunteers is also evident in the corporate strategy, which describes volunteers as ‘the lifeblood’ of the charity. Eiliyah said volunteers make up a ‘massive part’ of the charity as they ‘do so much for
us’ and Gillian emphasised that a lot of the charity’s services ‘would just not operate without volunteers’. These services provide support for both stroke survivors and their carers, who are often at risk of social isolation following a stroke. Carmel, a volunteer who supports carers during stroke group meetings, described the group she supported as ‘a lifeline’ for people affected by stroke. The vision of the charity is the occurrence of fewer strokes and for people affected by stroke to get the help that they need. The charity has five key values, which include professionalism, passion, innovation, working together, respect and openness. The objective ‘education, information and training’ is key to the charity in achieving its vision and it aims to be the leading UK provider of quality stroke information and training to the public and to caring professionals. Campaigning and wider awareness raising addresses the statistic that 80% of strokes could be prevented.

Training is provided for both staff and volunteers within the charity, with certain mandatory sessions, such as induction, and then role specific training. Training takes a variety of forms, including group sessions, team meetings, an annual conference and an online learning platform. Both staff and volunteer training include the personal experiences of stroke survivors, and Eiliyah emphasised the importance of being ‘able to hear that and see that first hand’. Training is viewed as part of the volunteering activity because volunteers are ‘still giving time to us’ (Gillian). Gillian said the charity supports and actively encourages training sessions that involve both staff and volunteers because this allows volunteer managers to gain clarification of training received by volunteers and a better understanding of their role as volunteer managers. All volunteers joining the charity must participate in a half-day induction training, which provides information on the charity, its vision and values, information on stroke and aphasia, supported conversation skills, safeguarding and health and safety issues. Gillian described the volunteer induction training as setting the ‘ground rules’ of the charity. However, Gillian acknowledged that training aims to be a two way process as, particularly at this initial stage, volunteers may still be deciding whether or not they
want to become involved in the charity. Volunteers are supposed to attend induction training before they start volunteering, however there are exceptions, such as Noel who I interviewed, who had completed his induction two years after he began volunteering. Gillian mentioned that volunteers who have been with the charity a long time may also attend induction sessions as a way to keep informed of developments within the charity. After completing induction training, volunteers are then able to attend training for specific roles. For example, volunteers involved with public blood pressure events must have practical training in how to take blood pressure, which involves learning about atrial fibrillation and the meaning of blood pressure measurements.

This section has provided an introduction to the history and culture of CS1. The following section presents a narrative account of the training for the charity's ambassador volunteers, which I observed in July 2014.

8.2.3 Ambassador training

This training is taking place at the regional head office of the charity in a small training room. There is a screen at the front of the room where the trainers present PowerPoint slides and five tables are arranged facing the screen, where volunteers will sit. The tables are positioned at a slight angle, making the room feel slightly less formal than if they had been set out in straight lines. There is a sign in sheet at the back of the room near the door, where volunteers sign their name as they enter. Each volunteer is given a training pack that includes particular information and literature relating to the ambassador role.

Two trainers, both female, lead the session, taking it in turns to discuss the information presented, and one other member of staff is observing the session. She tells the group that she is currently working with volunteer ambassadors and is interested in seeing what the training covers. Seven volunteers are in the session, including six males, all of whom are stroke survivors, and one female, who has not experienced a stroke.
Throughout the session the stroke survivors are keen to share their personal experiences of stroke, and they regularly bring these up following points raised by the trainers. All volunteers are already involved with the charity and either want to become more involved or have been recommended to attend the training by their volunteer managers.

The session begins at 10.20am with an introduction to the day and then personal introductions of the staff and attending volunteers. The trainers say that, although they have volunteers working in this role, this is the first training session the charity has provided for ambassadors. They describe it as a pilot and tell the attending volunteers that their feedback from the session will be used to further develop this training. The main issues around stroke are briefly outlined and the trainers talk about how the charity is responding to these issues, including their current research. They go on to explain the benefits of ambassadors delivering awareness sessions and place particular emphasis on volunteers sharing personal experiences of stroke. The volunteers are then asked what they think is the role of a stroke ambassador. One of the trainers writes their comments on a flipchart, which is next to the screen, and relates them to the work existing ambassadors are doing.

A PowerPoint slide is then presented on how the charity views the ambassador role. This includes a flexible, evolving role, reacting to the external environment and individuals, which works right across the charity. The trainers outline the diversity of the role, which ranges from delivering presentations to stocking leaflets in GP surgeries. The purpose of the ambassador role is outlined by the trainers, which mainly concerns raising awareness of stroke to the general public, and looking for potential fundraising opportunities. A particular activity that ambassadors are encouraged to become involved in is the charity’s regular blood pressure events, which aim to forward their preventative message about stroke, as high blood pressure is one of the biggest risk factors. Additional training is required for volunteers to be able to take people’s blood pressures at these events and the trainers give details of this training at the end of the
session. Expectations of the role are also presented, which include presenting a positive image of the charity, being confident to meet presentation commitments and to undertake appropriate training.

At midday the training breaks for 45 minutes for lunch, which takes place in the same room. Sandwiches are brought in and placed on a table towards the back of the room and there are also some hot drinks facilities at the back of the room. Volunteers help themselves, mostly eating back at their seats and chatting to the person sitting next to them. Some volunteers go out into the main office of the charity where they are familiar with many of the staff. After lunch, a current volunteer ambassador talks about his experience of the role and shares advice on how to perform the role. At the end of his talk volunteers ask him questions about his role.

The trainers start a presentation on how to plan an awareness session. They ask volunteers what they would need to think about before delivering an awareness session and write the points raised on the flip chart. The current ambassador adds that it is useful to be honest about the limits of your knowledge. The trainers tell volunteers that the training packs which they have been given contain a lot of useful information for their ambassador roles, including the main leaflets to distribute, key facts, a list of organisations to approach for potential fundraising and the presentation slides from this training session. The packs also contain instructions on how to sign up to the charity’s online learning platform.

The trainers then talk about the ‘next steps’ after this training session. They re-emphasise the expectations of the role and tell volunteers not to worry about answering every question at public events as they are not expected to know everything about stroke. The trainers also outline what volunteers can expect from the charity, which includes regular support, accurate information, further training, and opportunities to shadow existing ambassadors. The trainers reiterate that there is no pressure on volunteers at this point to become ambassadors and that they are free to decide after this training session.
The trainers bring up a PowerPoint slide with a pledge for ambassadors on it, which says they will approach at least one local organisation to raise awareness of stroke. They invite volunteers to contribute any other pledges and four volunteers make suggestions. With the session drawing to a close, the trainers mention further training opportunities for blood pressures and presentation skills. All volunteers in the session sign up to the blood pressure training. At 2.10pm the trainers end the session and encourage volunteers to complete the evaluation form on the training session that is in their training packs. Volunteers chat briefly to each other before leaving the building.

8.2.4 Vignette: Greg

Greg had been volunteering at the charity for almost three years when I interviewed him. He helps out at awareness raising events, such as information stalls, and takes blood pressures. He undertook the ambassador training 18 months ago and is trained to go out and give talks, although he has not done this yet. Greg also helps out at three local stroke groups run by the charity, which are regular social meeting spaces for stroke survivors and carers. Greg and his wife, who is a stroke survivor, both attend these groups and Greg helps out making drinks during the group meetings. Speakers from various external organisations often attend these meetings to give talks and workshops, and the most memorable workshop for Greg was a short poetry course. Group members continue to write poems and Greg says that every few weeks they will get together and discuss the poems they have written. Before attending this course, Greg never would have imagined writing poetry, and it was certainly never something he was interested in at school. However, Greg now really enjoys writing poems, and regularly writes poems about stroke.

Greg began volunteering at CS1 after his wife experienced a stroke and, following this, they both received much support from the charity. He admits that before volunteering he had no knowledge about stroke, but has now learned about it through his wife’s
experience and through training within the charity. Greg now feels confident to share his knowledge about stroke at awareness raising events and enjoys the feeling of helping people increase their knowledge of stroke. He often encounters people at awareness raising events that have never heard about stroke, or think it just affects elderly people, or even deny its existence. Drawing upon his training, Greg is able to share facts and figures around stroke with these people in order to help increase their knowledge.

Greg goes to two volunteer conferences and a carers event every year run by CS1. He really appreciates these opportunities to meet and learn from volunteers working in different areas of the charity, because different groups across the region are involved in different activities. Greg feels volunteers are all in the same boat because they all want to give something back to the charity. He is always keen to attend training events and keeps up to date with upcoming events through the charity’s website and their emails. Greg is retired and says the only restriction he has to the amount of time he can spend training and volunteering are his caring responsibilities for his wife. Greg feels fully supported in his volunteer activities and knows if he needs any help he can call the charity office. Greg also feels involved in the work of the charity. For example, he and his wife were invited to be part of a presentation to bid for additional funding for CS1. This involvement, along with his volunteer activities, has boosted his confidence and Greg feels he has gone from being a shy, reserved person to being someone who is happy to stand up and talk in front of groups of people and even share his poetry. Greg also places importance on having confidence in the people supporting his volunteer activities, which he feels increases his opportunities to learn.

Greg sees himself as training all the time through his activities with the charity and feels he is continuously learning about different aspects of stroke through talking to stroke survivors within the stroke groups. He has not accessed the online learning materials provided by the charity, but says he intends to as he thinks they look interesting. Greg places great value on training sessions as he claims volunteers
cannot perform their roles without learning about and being confident in what they are doing. Greg has drawn upon what he has learned in training during events like blood pressure testing and also in his personal life. For example, he was able to identify that his wife was experiencing a TIA and immediately called an ambulance, which the doctors told him had prevented her from having a massive stroke. Greg likes to talk about stroke to his friends, who sometimes complain that he talks about stroke too much. However, he says it is just because he is so enthusiastic about his volunteer work.

8.2.5 Main Themes

The previous section provided a description of CS1, the training it provides to volunteers and a particular experience of training from the perspective of one volunteer. The following section presents the main themes identified within the CS1 data, which include emotions, historicity, position and transformation. These themes will be discussed in turn but their relationship to each other will also be outlined throughout the sections.

8.2.5.1 The emotional connection to activist pursuits: ‘I am absolutely passionate about what I do’

As has been outlined in previous volunteering research, long-term volunteers are considered to have a ‘strong emotional investment’ in their volunteer activity (Danson, 2003 in Rochester et al., 2010, p.29). Such emotional investment was identified in this case as volunteers regularly used words like ‘passion’, ‘joy’ and ‘enjoyment’ when they were talking about their volunteer activities. The interviews and focus groups were also brimming with emotion, as volunteers came close to tears when talking about their own experience of stroke and the high amount of laughter as they discussed their activity. As discussed by previous CHAT scholars (e.g. Nardi, 2005; Roth and Radford, 2011),
the emotions expressed by volunteers are useful in understanding beyond the actions of subjects to focus more on why they 'do what they do' (Roth and Radford, 2011, p.viii). David described how these emotions, which focused on the object of stroke, also strengthened the community of the activity:

From the people in London at the top of the organisation to all the volunteers and people who work in all the different support groups. The passion that the people have for what they’re doing is immense. (David)

In the focus group, David described how the object of stroke within the system of the charity creates the shared emotion of 'passion', which both unites subjects in the activity and motivates them:

I think that comes over from just about everyone that we meet and there must be something about this particular subject, this particular charity, this particular work that causes that passion to rise, that people feel so deeply about. There must be something in it, that would be extremely, be hard to define, but it's there and it's there in every one of us. (David)

The following exchange within the focus group, when David asked Glenn what he considered to be his 'reward' for volunteering, is an example of how this emotion helps reveal the reasons behind why volunteers are participating in the activity:

David: All the wonderful things that you do and so on – do you want a reward?
Keith: No
[pause]
Glenn: The only reward I want is to see somebody feeling better in their own mind [voice raises] in their way. I don't expect people to get up and walk straight away.

David went on to say:

David: Right OK. So obviously it's very [laughs slightly] very difficult to describe but we do the work that we do and we are rewarded tremendously with the rewards that we get.
Glenn: Yeh. It's true.
David: And that's all that we expect and want.

The ‘reward’ volunteers refer to here could be described as what Roth (2007a) calls an emotional payoff for their volunteering activity. For the volunteers in this case the emotional payoff was closely connected with the service users of the charity, as Hazel described: ‘I get more from [volunteering] than they do. They don’t think that. They think you’re some kind of angel and trust me I’m not!’ When discussing the perceived
outcome of his volunteering activity, Greg linked together service users, himself as a volunteer and the organisation through the shared emotion of happiness:

And people go away happy, I'm happy, CS1 is happy because we're getting the message across. To me that's what it's all about, that's why I became a volunteer. (Greg)

The passion that David describes as being already 'inside' the volunteers was shown in the data to be mediated by training practices. As the volunteers directed this passion towards the object of stroke, they described training as helping to increase their confidence, as Greg described:

But as I say it's just down to confidence. My confidence has gone [makes noise] sky high now. Just because of the training I've had and I know that when I do go to events I can help people just by giving them information. (Greg)

Training enables volunteers to feel as though they are 'doing the job well', as both Greg and David described. This confidence allows volunteers to get 'joy' from their activity, as David explained:

The wonderful thing about me doing stroke work is that it's something I can do and I can do well [...] You know – you would get the joy out of doing something and doing it well, that's the thing, that's what it is. (David)

Greg and David both described this feeling of confidence as helping volunteers distribute, not only knowledge, but also their passion as Keith described: 'I mean as volunteers this is our aim if you like, to try and get this passion across to the people we’re talking to.' David described the passion he feels for the volunteering activity, which he described as his 'purpose in life now', as vital for both understanding the object of stroke and for conducting his activity:

I think I’m capable of doing the job that I do because I am absolutely passionate about what I do and I think that’s important. I think you need to understand your subject and be quite passionate about it. You can’t do the job that I do unless you care about what you’re doing. (David)

The quote from David indicates the need for an emotional connection to the object of stroke in order to drive the activity of volunteering forward. This emotional connection could be mediated through the practices of training and the following section will further explore how this mediation takes place, particularly through the historicity of volunteers, in which emotion is an integral aspect.
8.2.5.2 Historicity of volunteers: ‘their experience belongs to them’

Volunteers come from a diverse range of backgrounds and, as was described by Leontyev (1974) in Chapter 3, they do not simply ‘bring’ this historicity into training. Rather, this historicity interacts with the current activity in the social and cultural context, which enables potential transformation and therefore learning. Personal experience of stroke was a common reason for people volunteering at CS1. An expectation of this personal experience became clear to me when I attended the regional volunteer conference for the charity at the beginning of my research. I sat down next to a lady in her late sixties, who immediately asked me ‘So when did you have your stroke?’

The historicity of volunteers contributes to how they are positioned towards the object of activity, or the stance they take towards it (Stetsenko, 2012). For example, Greg was motivated in the volunteering activity by his historicity and experience of stroke:

> I feel if I go to an event and I give information to one person and they go away happy, I’m happy. Cos I feel then that I’ve helped somebody who, like myself, when it happened didn’t know anything about stroke. (Greg)

The historicity of volunteers could be re-mediated as volunteers participated in the volunteering activity and within the practices of training. In instances where volunteers were drawing upon skills from their professional work, this process of re-mediation seemed to be smooth and unproblematic. David and Noel viewed drawing on their existing presentation skills gained from their previous jobs as straightforward, as did Carmel with her beauty therapy and reflexology skills. As Noel said, ‘A lot of the stuff that I do, I sort of brought - without meaning to sound bigheaded! - I brought those skills with me.’

However, when the process of re-mediation related more closely to the object and personal experiences the process was more noticeable for volunteers who described more of a ‘qualitative’ change (Cole, 1996). For example, Hazel, who had retired from a busy sales job, said in her working life that she had never come across any ‘bad
illnesses or stuff, generally speaking people wouldn’t come back to work if they had a sort of stroke’. Through her activity within the charity and engagement in training practices, both Hazel and her perspective of the object had been transformed: ‘I think I’ve gained, not only a lot of knowledge about stroke, but perhaps some more patience with life.’

Within training, volunteers drew upon, or re-mediated, their own personal experiences of stroke and the experiences of other volunteers within the training group. The emotions imbued within this process of re-mediation could explain why volunteers perceived this learning as separate to the parts of the training that ‘gave’ them ‘information’ like ‘facts and figures’ (David). For example, in the focus group Glenn described the emotions imbued in his personal experience of the object when the group were discussing how knowledge of stroke was taught in training:

Glenn: [To David] You say you’ve looked in to it, well looked in to it and you’ve taken that on and got this and that, but when you have had a stroke [slight pause] there are things that [slight pause]. It's deep. Excuse me, we’ve looked over the edge and you don’t like it. And you can tell people that, I’ve sat on the end of the bed having a cry
David: Yes
Glenn: You know. You wouldn't believe it [voice breaks slightly]
David: But that’s something I would never know.
Glenn: No you wouldn’t.
David: I could never learn
Glenn: No
David: that kind of fact about stroke
Glenn: And you wouldn't learn that even if you were showed how to do it so that’s something.

Both Glenn and David are saying that the unique personal experience of the object of stroke is something that can never be learned. However, these unique personal experiences were mediated within the practices of training to become tools of learning for other volunteers. Therefore, the emotion Glenn describes is not an ‘individualistic psychological state’, but is ‘a relation of emotion’ to the wider activity of volunteering and the object of stroke, which has transformative potential (Nardi, 2005, p.48). The experiences and ultimately the historicity of volunteers became mediating artefacts for
widening possibilities directed at the shared object of stroke within what Stetsenko (2012, p.149) describes as the ‘unfolding collective practices’ of the charity. For example, in the focus group, Glenn told the group that following his stroke he was encouraged to set a personal goal, which he chose as cutting up his own Christmas dinner:

Glenn: I want to go and have me Christmas dinner without people cutting me meat up for me. You know? Before that they were saying, come on I'll cut your meat up. I had this big fork and a knife with a rubber thing on it. Anyway I did it, Christmas day I cut me own turkey up we took pictures of it and showed it to them. Eh I felt great! Really good! Really good! I felt that happy I could have, you know, my glass eye was crying!

[the group laughs]
Glenn: That’s a feeling you won’t find anywhere else.

The emotion of this experience is strongly expressed by Glenn. David, who had never experienced a stroke himself, described hearing these kinds of experiences from stroke survivors as ‘new learning’ and related it back to another experience he had heard about in his volunteering activity:

David: I spoke to a lady whose husband had had a bad stroke and she said something on a similar line to [Glenn]. She said, every conversation I have with him is like a game of charades. [Keith laughs] Without the humour. [pause] And now you’re telling me that the one aim, one of the aims you had, was something simple like being able to cut your own meat

Glenn: Exactly – simple.
David: Which gives me a far better understanding
Glenn: Of what I was going through
David: of how a carer feels and how a stroke survivor feels

Whilst Glenn’s experience is personalised, ‘what I was going through’, David is able to generalise the experience within his activity of volunteering to act on the object of stroke. He went on to emphasise the importance of such experiences to the training of volunteers:

David: That is the kind of things [sic] I feel have got to come with the training. And people have got to be given this new learning, this information about stroke and the effects of stroke before they can go out and talk to people and convince people that having a stroke is something that you don't want! You know. You must try and avoid it!

Glenn: They’ve actually got to go and do this, almost tasting it in their mouth [makes tasting noise] Knowing what people have gone through
David: Exactly. That to me is worth a thousand, a thousand hours of lectures. Here David and Glenn are expressing that without an emotional connection to the object of stroke, through their own historicity or the historicity of other subjects, volunteers are limited in their ability to act on it, no matter how many ‘hours of lectures’ they experience. However, volunteers such as Noel and Greg, whose historicity involved personal experience of stroke, claimed they had no knowledge about it until they completed the training within the charity:

To be honest with you when I had my stroke I couldn’t tell you what a stroke was. I didn’t know. (Noel)
Because I didn’t know anything [emphasised] about – I’d never even thought about stroke! (Greg)

Therefore, personal experience of stroke alone in this case did not necessarily contribute to learning, or motivation to learn. David illustrated this point when he talked about feeling unable to teach others about diabetes, even though he had been living with diabetes for a ‘long time’:

I’ve never bothered to learn about it. So because I haven’t learnt about it, because I’ve had no training about it, because I don’t understand it, I wouldn’t be very good at trying to give a talk on diabetes. (David)

Gillian also described how volunteers could get ‘stuck’ if they relied solely on their own personal experiences to act on the object of stroke and David expressed the need for volunteers to learn beyond their own experience:

Sometimes a person who’s had a stroke feels that they know almost everything there is to know about stroke. One thing I’ve learnt over the years is that no two strokes are the same. So therefore it stands to reason that one’s experiences of having had a stroke will vary tremendously across the board. So one person’s experiences will not have been shared by somebody else who has had a stroke, although we know that there are common factors and effects of stroke that it’s highly likely that two individuals will have experienced, but it doesn’t apply to everything. (David)

Gillian describes a contradiction within personal experience of stroke as being both valuable and not valuable to the volunteering activity:

[Volunteers] need to have dealt with their own experience and realise that their experience belongs to them. What we can see sometimes is people impose that experience on to others and say, I’ve done this, you can do this. Now they need to have dealt with it, they need to know that that’s their experience and that’s really valuable. We can’t replicate that as non-stroke survivors and that’s going to be really valuable in supporting someone, but they have to remember that
that's their experience and that person they’re supporting could have a very different experience. (Gillian)

The contradiction that Gillian describes could be explained as emerging between the ‘use’ value of this experience and the ‘exchange’ value. The personal experience is valuable to the volunteer when they use it to position and motivate themselves towards the object of stroke and the activity of volunteering, as described by Glenn. However, when they come to ‘exchange’ this experience within training or their volunteering activity tensions can arise because, as Gillian describes, ‘their experience belongs to them’ and thus it becomes alienated from them. David warned that simply ‘passing on’ the experiences of a stroke survivor could lead to these experiences getting ‘distorted’.

This could be described as verbalism, which is ‘a mindless learning of words’ (Vygotsky, 1987, p.105) where there are just ‘empty words’ without action and therefore without the possibility of transformation (Freire, 1970, p.68). Therefore the concept of re-mediation is useful because, whilst personal experience of the object was insufficient on its own, the re-mediation of the historicity of volunteers enabled the development and expansion of their own understanding of stroke, which allowed for wider transformation.

The next section focuses on how, through their historicity, volunteers are positioned within the charity, which can both afford and constrain their access to knowledge and thus the potential for transformation.

8.2.5.3 The unique position of volunteers: ‘it’s a great opportunity to learn’

In CHAT, the division of labour creates expansive opportunities for a collective activity. Such expansion was evident in this case for both the volunteers and their surrounding environment. For example, in terms of the charity, Gillian claimed that without volunteers a lot of the services of the charity would not be able to operate:

[A] lot of the stuff we just couldn’t do without the support of volunteers and I know all charities say that but it is true, it is true. You know, we would have less awareness in communities, we wouldn't raise as much money, we wouldn't be able to - I think primarily, you know, a lot of the things in terms of […] stroke
support services we wouldn’t be able to offer. So, you know, a lot of our services would just not operate without volunteers, so yeah they’re a really important part of what we do. (Gillian)

The practices of training in particular expanded the possibilities for volunteers and through participating in these practices they were able to hold multiple positions within the charity. For example, service users such as Greg, Glenn and Keith became volunteers and volunteers such as David and Hazel became trainers. Greg attributed his expanded volunteer activities to training: ‘it’s all due to the training, the information I’ve had and the things I’ve done that have helped me learn more’. Possibilities for the charity were also expanded as more experienced volunteers were able to support other volunteers, as Greg described: ‘once you’ve built your confidence up and you feel that you can do it, then you can help others that are coming in.’ Furthermore, Eiliyah described the importance of training for providing volunteers with the ‘same messages’ that ‘fit in with our key message and ethos’ because ‘it’s very difficult capacity-wise to follow every ambassador to their presentation and see what they’re saying!’

While the role of volunteers and their possibilities were expanded, their position remained distinct to that of paid staff:

It’s not just a job. And God forbid that anybody ever offered me a job in stroke. I would never take it. Being a volunteer has tremendous advantages and one of them is you can never sack me! [laughs] (David)

The distinct position of volunteers gave rise to particular motives, tools and learning experiences. For example, both Glenn and Hazel described the value placed on them from service users who recognise their voluntary position within the system:

That’s right I say, I always say the same thing, we get nothing for this, we don’t even get [mimes getting something out of his pocket] that for it! Oo you know and aren’t they all thankful, thank you very much for giving your time to, to come here and you know it’s, it’s nice when you’ve done it. (Glenn)

So it’s really nice that that’s the case where they think we’re better than we are. They think we’ve done something really exceptional and we don’t think we’ve done anything exceptional. I think we’ve just given our time and effort to help them improve a little really. (Hazel)

Volunteers in the focus group also expressed the feeling of being valued by the charity and the position they hold within the charity as being another ‘reward’ for volunteering:

David: I mean I feel that it’s an honour and a privilege to be asked by CS1
Glenn: Oh yeah.
David: and I feel that that's a bit of a reward
Glenn: Oh it is yeah.
David: for what I've done. So in that sense I do look at it, I look [emphasised] at what the CS1 thinks of me and what they ask me to do. I look upon that as a bit of a reward for the kind of work that I've done in the past. And they are prepared to ask me or they're confident to ask me, knowing [emphasised] that you're going to do, you know
Glenn: Yeah a good job
David: when you're asked.

Volunteers also spoke about the value they placed on their own position in the charity.

For example, Jerry described the ‘sense of responsibility’ he felt in his ambassador role:

It is an important role, you have to take it seriously. And that's it! You can't just – I'm an ambassador and do nothing! You have to be seen to be doing things around and that's it. You might as well not be one. (Jerry)

The value volunteers placed on their position within the system also motivated them to participate in training:

I think a great deal of responsibility lies upon the student's shoulders who must [emphasised] make every effort to enlarge their own knowledge of the subject and combine it with the training that can be given. (David)

Therefore the rules regulating the activity, and specifically the practices of training, are not just imposed by the charity making certain training mandatory. These rules are also imposed from the subjectivity of volunteers and their own expectations of the volunteer position. For example, Jerry described attending training as his ‘duty’ as a volunteer.

However, while their position could motivate volunteers to engage in training, it could also restrict the training they felt able to get involved in. For example, David described it as ‘other people’s decisions whether you are invited to those courses and they are often by invitation as opposed to a personal choice’. He went on to describe occasions where he was told, ‘you are not in a position to need to know’ certain information, such as organisational structure or strategies: ‘they wouldn’t tell you because it’s not for volunteers, it’s for staff only.’ He also described ‘hearing information’ rather than ‘being told':
I know that in the last 20 years the incidence of deaths from stroke in people over 65 has been reduced by a significant figure. That was something I heard, I was never told it. I don’t know exactly what the figure is. It’s a very important statistic that I would like to use in my talks, but I would want to be far more certain about the facts in order to use that kind of figure. I think it’s an important figure for us to use. I’m also told that blood pressure in school children is rising, again something I’ve heard, I’ve not been told. Rising by how much? How significant is the threat? What can we do about it? What can we tell people in clear terms? (David)

Among the different motives that arose from the position of volunteers within the charity was the feeling of belonging to the charity. This sense of belonging was an important mediator in enabling volunteers to act on the object of stroke and engage in training practices. Noel said he valued training because ‘it brought us together as a group of volunteers’ and helped ‘bond’ them as a group. However, Noel also described how his position as a volunteer could restrict his feeling of belonging to the charity:

[V]olunteering can be a bit of a funny thing. You don’t belong to the organisation. And it’s kind of - if you were an employee of CS1 they would have a responsibility to train you […] I know if I feel I have a training need I should be pushing for it, I’m sure it’s there. But in some ways I think it would be good if it was coming from them – what training needs, have you done this? A lot of it might not be relevant to what we do, but again it’s that bonding thing, it’s that belonging thing. If you pull people in, make them feel part of something, I think you get more out of them. (Noel)

Gillian also described how long-serving volunteers who had not participated in any initial training could be ‘a little bit out of step with what we’re doing as an organisation’. Therefore, training can act as a tool that creates a shared understanding and sense of belonging to the charity.

A contradiction is identified here within the division of labour of the volunteering activity. On one hand, the position of volunteers is much valued by all subjects in the system and it also allows expansion of the system. However, on the other hand, their position can restrict their feelings of belonging and ability to act on the object of stroke. The following quote from David illustrates how, through his activity within the charity, he is addressing this contradiction. He begins by describing the conflict he felt when denied access to particular information:

It’s extremely difficult, it’s very very difficult to accept that you’re not entitled to know. It’s not important to you. Well it is to me! Well you’re not going to know, we’re not going to tell you. That kind of thing. That makes it difficult. (David)
He goes on to recognise the conflict between his desire to ‘know’ and his position as a volunteer:

But you are not going to be party to all information. You have to accept that. You have to say, look I’m not going to be party to all that information and you have to be prepared to say to your manager – I feel that it would help me if I knew what this was. If they agree, they would soon tell you, they would soon let you have the information. If they didn’t they would say, I’m sorry we’ve decided to not proceed along that path or, you know, whatever. And you have to say to yourself, it’s not my decision, it’s not up to me. So it’s a pity, but it’s not. (David)

This process of the negation of his desire to know and the preservation of his position within the system creates a new form, as David refers to the diplomatic skills needed for his volunteer role:

So getting that situation is a bit difficult but you’ve got to do it. You’ve got be as diplomatic in everything else as you are in, you know. It’s no good saying well I’ll put up with it in one field and not another. You’ve just got to learn to say well, you know, that’s the way it is. (David)

This tension between the position of paid staff and volunteers could be revealing what Engeström (2001) describes as a historically accumulating contradiction. Within volunteering this situation has been described as ‘professional amateurs’ (Andreassen et al., 2014). In this case, volunteers enter the charity as amateurs (although they may have professional experience in the area) but they are trained to provide a professional service and are expected to fulfil their role in a professional manner. Many of the volunteers I interviewed were aware of this tension and Noel described the ‘danger’ of ‘putting yourself forward as some kind of stroke expert and we’re not.’ David described how the idea of ‘learning on the job’ adds to this contradiction:

[When I did my first event with [charity staff member] although I was only watching and standing by we still had to give the customer the best service we could. It was no good telling the person - well I’m not sure whether this will be right because I’m only learning. It’s no good telling somebody that when you’re doing their blood pressure! (David)

However, David also commented that despite his position as an amateur within the system, through his volunteering activity he was still able to act on the object of stroke:

Very often people will say to me when I’m giving a talk, well I had so and so did I have a stroke? I experienced this – did I have a stroke? This will happen and clearly of course you’re in no position to tell them whether they’ve had a stroke or not. But at the same time, you have raised an issue in their mind that it may very well have been a warning to them about stroke. And obviously the best
advice is to talk to their health professional about it and to talk to somebody who can really understand what’s going on. (David)

Hazel also described how the contradiction of her amateur position and the professional expectations of her volunteer role had motivated her in learning about the object of stroke:

I spent a lot of time researching because I thought – there’s no way I’m going out there, standing in front of a group, unless I know the subject matter and I know it well enough to know I’m on the right ground. Because I’m not medical and I don’t want to be medical, I’m simply interested in preventing strokes or making people aware of these sorts of restrictions people have after a stroke. (Hazel)

The amateur-professional relationship here is different from a novice-master relationship where novices generally work to become a master. Linear progression is not the aim of volunteers and their position as amateurs within the system affords them a certain freedom to expand their learning opportunities. This affordance of their position was contrasted by some of the volunteers to other areas of their lives:

Another thing you’ve got to do as a volunteer is that you’ve got to open your mind. You’ve got to be prepared to learn and it’s a great opportunity to learn because it’s not like a job where you’re under pressure. When you’re the manager you’re supposed to know everything. I know nothing, I play dumb all the time, it’s great! And you do pick up so much more from people. (Noel)

This quote from Noel indicates that a lack of expectation ‘to know everything’ within his volunteer position had afforded him the freedom to learn. Greg similarly described how, through his position as a volunteer, he had participated in a poetry course, which was an activity he never expected to get involved in: ‘if I’d been at school and talked about poetry I’d have got battered! [laughs] A couple of the others said the same – talking about poetry, it’s not us!’

In this case, the contradiction between the amateur position of volunteers and the professional expectation of their role appeared most prominently in the volunteer activity of taking blood pressures at public events. Volunteers are trained how to take blood pressure readings and given the knowledge of what a healthy blood pressure should be and the rules of what to do when a blood pressure is dangerously high. However in practice, as Noel described, it is not this straightforward. The largest
conflict seems to come from how volunteers are subjected to the activity, or in other words, their position within the system. Volunteers talked about how they cannot tell people what to do and can only offer advice: ‘whether people take our advice as they walk out the door - it’s up to them whether they go and get [their blood pressure] checked’ (Jerry).

Greg also repeatedly made the point that as a volunteer he could not tell people to follow up on a high blood pressure reading:

[Y]ou see we have to explain when we do go out to these events and we take blood pressures we’re not actually telling them, we’re advising them. We take the blood pressure and depending on how it is we can then advise them – it’s fine you don’t have to do anything or it’s a little bit high, go and see your doctor, or it’s that high go straight away now to your doctor or to hospital. That’s – we just advise we’re not actually telling what it is – we just advise them. (Greg)

In the event that a blood pressure is dangerously high the knowledge of what to do in this situation, as well as the rules of the system, come into conflict with how the volunteers perceive their authority and position themselves within the system:

Some of the BP reads you get are actually quite scary. Jerry and I were doing one and a gentleman presented and we did his BP, from memory a standard BP would be 120 over 80 his came out over 200 over 20 – it was huge, massive! That’s life threatening, potentially. Now the gap in the training, the gap in our skills, was what to do in that situation. On paper it says when it’s that high you should ring an ambulance. We really aren’t qualified to do that. (Noel)

Noel explained how additional learning was required to address this conflict:

‘Investigating it a little bit more, in actual fact you look for other signs – blood shot eyes, sweating, pale, that sort of thing.’

Individual subjects are limited in how they can act on these contradictions within the activity. However, training as a practice within the collective activity of volunteering can help position them as belonging within the system and increase the expansive possibilities for all subjects. Overall, the position of volunteers within the system and how they position themselves impacts on their ability to work on the object, which can both afford and constrain their opportunities for learning. The following section explores these opportunities for learning by examining how this process is manifested through transformation.
8.2.5.4  
Transformation: ‘I feel that I’m the face of stroke in whatever I do’

For volunteers in this case, knowledge about stroke had become meaningful through training because it was linked it to their activist pursuits (Vianna and Stetsenko, 2011). For example, David explained his reasons for participating in training because these practices enabled him to work on the object of stroke:

I like the idea of gaining new skills in order to improve my capabilities of spreading the word about stroke and to become better at it in the hope that it will prevent some strokes occurring. And in the hope it will improve the life of some people who have perhaps suffered from stroke. So I want to be better at that and I will become involved in any training that will lead to that end. (David)

Through working towards this object of activity, David described a process where he was becoming the object of stroke: ‘I feel that I’m the face of stroke, I feel that I’m the voice of stroke [...] yes I feel that I’m the face of stroke in whatever I do’. This process of becoming, through his ‘activist pursuits’, describes a personal transformation of David as conceptualised in TAS (Stetsenko, 2014), and also a social transformation as he is motivated to learn and to transform his environment:

I feel that I’m the face of stroke, I feel that I’m the voice of stroke and therefore I’m always conscious of the impression and – a. that the information I’m giving is totally correct, and b. that the impression I’m giving is one of professionalism and in full compliance with the ethos of CS1. (David)

Greg also described how the training he had participated in had felt personally transformative:

For myself personally it’s brought me out of myself. I’ve always been shy – my wife says whenever we go somewhere you sit in the corner and say nothing! But now I can stand up in front of people and talk, I can do my poetry. I’ve been at events when something has gone wrong and people have said – read one of your poems Greg! At one time I’d have never stood up in front of people and done that! So my confidence has been boosted by being a volunteer and all the training I’ve had – it’s really boosted my confidence. At one time I wouldn’t have said boo to a goose. But now I feel confident that I can do it. (Greg)

This personal transformation enabled Greg to achieve his original motivation for volunteering and enact wider, social transformation:

Every bit of training that I’ve done has always been really helpful to me personally, but also helpful that I can then put it out to the public. I can help people. And that’s what I volunteered for – so I can help people. (Greg)
Volunteers like David and Greg could be seen as becoming *activist learners* where learning has become ‘a meaningful quest for personal and social transformation’ (Vianna *et al.*, 2014, p.72). Social transformation as a ‘meaningful quest’ was described by Greg, who saw the outcome of his activity creating a ‘ripple effect’ beyond the charity system:

OK so you can never stop a stroke or say one’s coming up but you’ve got an idea when it does happen what to do about it. And to me that’s brilliant. To me that’s what volunteering is all about, that’s what training is all about. So you can get it out to the public when you go to events and as I say if I can make one person go home happy I’m happy because I’ve done what I’ve set out to do. But it’s always more than one person. (Greg)

For Greg this ‘ripple effect’ had actually saved his wife’s life, as by drawing on the knowledge he had learned through training he had been able to recognised she was experiencing a TIA:

Greg: I mean my wife had a TIA about eight months ago, she didn’t know what was happening. And I wouldn’t have known if I hadn’t had the training I’ve had now. We were just sat in the house and I thought there’s something not right, she was slurring her words, she was unsteady on her feet and I just thought – TIA. So I phoned the ambulance and they were there within 10 minutes, took her into the hospital, did all the scans and everything [...] And the doctor did say to me after the operation – they got to her just in time. If they’ve left it much longer she could have had a **massive** [emphasised] stroke.

Me: Thank goodness you took her to the hospital when you did-

Greg; Well, that was down to the training I’ve had! A lot of other people might not have noticed it who haven’t had the training, or have not had a stroke before.

Noel also described how participating in training had enabled wider social transformation, mediated by the ‘transformative tool’ of knowledge (Vianna and Stetsenko, 2011):

The knowledge I’ve gained has challenged me to look at what we do, what I do what my wife does, where I can influence gently what my friends do. So yeah it’s helped me. (Noel)

Unlike the other volunteers I interviewed, Carmel initially placed little importance on the training she had undertaken at the charity. She saw herself as bringing her professional skills into her role as a volunteer, along with her general life experience. However, when I asked her about her understanding of stroke she described conducting her own personal learning and learning from speakers who visited the stroke group she
supports, which included talks on benefits, alcohol and cancer. As with David and Greg, it was her activist or ‘meaningful life pursuits’ (Stetsenko, 2014) relating to the object of stroke that motivated Carmel in her learning: ‘Of course when you’re working with stroke survivors and carers you read more into it. You kind of look up things, you’re more interested in it.’ Therefore, volunteers were motivated by their stance towards the object to expand their horizons for learning (Engeström, 1987).

The theories of TAS and expansive learning both explain learning as a form of transformation through the process of addressing contradictions within the system. In this case, a contradiction seemed to emerge within the practices of training, which David described as the ‘gap’ between ‘what you can learn in a classroom and what you can learn by standing by someone and shadowing someone.’ On one hand, the importance of organised training sessions as a way of accessing knowledge about stroke was emphasised and David argued that this kind of knowledge could not just be ‘picked up’ in the volunteer activity:

I have stressed and will continue to stress that a good ambassador needs an in-depth knowledge of stroke. You cannot be a good ambassador until you understand and have a good understanding of stroke. At the ambassador training, one hopeful ambassador said to me well, I’ll pick that up as I go along. You won’t. Sorry you may, but it’s going to take you a long time and in the meantime you may have some problems. (David)

However, on the other hand, the dynamism of the role and the environment was expressed by Keith and Glenn in the focus group, who both emphasised the importance of being ‘hands on’ rather than ‘learning from a book’:

Glenn: You can’t beat being hands on
Keith: No. Well, there’s certain things you’ve got to be hands on, and certain things-
Glenn: Because in a place like that you can actually be hands on and if I was doing something wrong you could actually ask and say - well I would do this or I would, you know, what do you think? You’re not told in a book what to do because things come up and you’re entirely, you know, you’ve no idea! But to be hands on I think is a very good idea.

Within the theory of expansive learning, such a contradiction is worked upon through the reconstruction of the object of activity (Engeström and Sannino, 2010), which could
be seen in this case. For example, the object for volunteers such as Greg, became continuous learning about stroke:

> I talk to a lot of carers and survivors and you’re learning different things about stroke and how it’s affected different people. And as I say, to me I’m training all the time, I’m learning so I’m training all the time. But I know if I need any specialist training I know it’s there for me with CS1. It’s all about training because you can’t go into somewhere and start doing things without some sort of training, of learning what you’re talking about – otherwise you could be going in somewhere talking a load of gibberish! (Greg)

In the above quote Greg brings together learning from the everyday experiences of stroke survivors and carers with the specialist knowledge required for performing the volunteer role. Through this process, learning becomes ‘a dynamic phenomenon’ (Roth, 2012, p.256) and the object of activity has been transformed from acting up on stroke to learning about stroke in order for it to be acted upon.

### 8.2.6 Summary

Four main themes were identified within this case including emotion, historicity, position and transformation. The strong emotional investment volunteers have in the object of stroke both strengthens the community of the activity and motivates individual subjects within it. This emotion is part of the historicity of volunteers that interacts with the environment of the charity. Their personal experiences, which are imbued with emotion, became artefacts for learning when they were re-mediated within training. Without this emotional connection to the object of stroke, through their own historicity or the historicity of other subjects, volunteers are limited in their ability to act on it, no matter how many ‘hours of lectures’ they experience. However, personal experience of stroke alone did not necessarily contribute to learning, or motivation to learn. Therefore the concept of re-mediation is useful because, whilst personal experience of the object was insufficient on its own, the re-mediation of the historicity of volunteers enabled the development and expansion of their understanding of stroke, which allowed for wider transformation.
The unique position of volunteers within the system of the charity offers expansive possibilities for both the charity and individual subjects. Volunteers described a freedom and agency over their own learning in this environment, where training was considered a tool that enabled a sense of belonging to the community of the charity. However, contradictions emerged within the division of labour, most notably between the ‘amateur’ position of volunteers and the ‘professional’ expectations of their activity. A further contradiction was identified when volunteers talked about the existence of a gap between knowledge learned in training and participation in practices. In acting upon these contradictions, volunteers described engaging in a continuous learning process, which provided transformational opportunities for themselves, the charity and the wider environment.

8.3 Case 2: ‘it’s just that I feel really different’

8.3.1 Introduction

In this case (CS2) I interviewed staff members Klara, who was the clinical lead at the charity, and Nadja, who was a trainer for the charity. Volunteers Sophia, Gina, Hayley, Shauna, Terry, Rebekah and Stephanie attended the focus group and I individually interviewed Sophia, Terry, Rebekah, Joni, Harmony and Justine (see Appendix 2 for further information on participants).

8.3.2 History and Culture

The charity has existed since the early 1970s, as part of a wider feminist movement across the country in response to sexual violence against women. The charity is supported by a national body, which supports a number of local sexual violence centres across England and Wales. However as a local centre the charity functions independently. The annual report of the charity claims that its original aim still remains
today, which is to support women who have experienced sexual violence at any point in their life. Three main areas contribute towards this aim, which are to believe women without judgement, to actively listen and hear what women coming to the charity say, and to support women through counselling, a helpline and practical support.

In training, the approach taken to supporting women using the services of the charity was described as empowering them, and not to, as Klara described ‘repeat the dynamics of abuse and control’ that she claimed happens in some statutory organisations. Therefore, CS2 was viewed as sitting ‘outside the system’ (Shauna) and is not part of, for example, a SARC (Sexual Assault Referral Centre). Although SARCs deal with the same issue of rape and sexual assault as the sexual violence centres CS2 belongs to, their history, purpose and way of working are very different. For example: SARCs work closely with the police whereas the majority of women supported by CS2 have not reported their assault to the police; and SARCs offer women a limited number of counselling sessions, whereas CS2 offers open ended counselling. SARCs also support both women and men, whereas CS2 is a women-only service and all staff and volunteers are women. The charity has always been based in a women-only building, which has a long feminist history, and is shared with another women’s charity.

The charity operates from a small office within the women only building and offers one-to-one counselling, therapy groups and a helpline. The helpline, which primarily offers a listening service to female survivors of sexual violence, has been operating since 1979 and has always been staffed largely by volunteers. The annual report (2013) states that the helpline that year took over 4,500 calls from survivors of sexual violence. This was a significant rise from previous years and the report suggests that the highly publicised cases of sexual abuse in the media at that time, such as Jimmy Saville, could have been an influencing factor. The charity has always received a higher number of support requests from women who have experienced historical childhood abuse and non-recent rape and abuse, than women who have been raped in the last twelve months.
One reason for this may be the lack of statutory organisations that offer support to women in this area. Therefore, the training for volunteers to support these women needs to cover specific areas, one of which is Dissociative Identity Disorder (DID), a condition that specifically affects survivors of childhood trauma (Spring, 2012).

The website of the charity states that it relies on volunteers for the successful running of its services and Nadja agreed: ‘the organisation wouldn’t be able to run without the volunteers.’ There are two main roles within the charity that volunteers are involved with and these include counsellors and helpline workers. Volunteers who join the charity as counsellors need to have completed, or be near to completing, professional counselling training and have experience of working with adults in counselling relationships. Volunteers joining the charity as helpline workers do not need any specific qualifications, but are required to complete an application form and participate in an eight session training programme, which takes place within the charity over ten weeks. The training programme covers listening and communication skills, a feminist understanding of sexual violence, the impact of sexual violence on women’s lives, dealing with distressed callers and the law around sexual violence. Due to the challenging area that volunteers are being trained in, self-care is an important theme throughout training and grounding techniques are often practiced at the beginning and end of training sessions.

The training involves role-play activities, where volunteers are provided with a short scenario and work in a group of three, with one volunteer playing the role of the caller, one playing the role of the helpline worker and one observing and giving feedback. Once volunteers complete this training, and have been approved by the trainers, they must then sit in or ‘shadow’ two helpline shifts before volunteering on the helpline. On the Saturday training days, existing volunteers, the charity manager and trustees are invited to join the training group for lunch to give new volunteers the opportunity to meet other members of the charity and ask questions about the helpline work.
Counselling volunteers are given an induction to the charity but are not offered such extensive training as the helpline volunteers. Klara explained that the reason for this difference in training was because the charity assumed that counselling volunteers were already trained in communication skills and had the ability to self-reflect. However, the charity did provide them with training specifically related to working with sexual violence, relevant organisational policies and the charity’s particular model of counselling.

Although some helpline volunteers work in the daytime, the majority cover the evening shifts as the helpline is open for three hours in the evening twice a week. The charity’s helpline is confidential and callers can ring anonymously; there is no requirement for, or even possibility of, helpline workers reporting any concerns to the police or any other organisation. Klara described this situation, which is an integral part of the work, as being potentially challenging for some volunteers and that it was through the process of training that volunteers had the chance to decide whether or not they would be able to work in this particular way.

This section has provided an introduction to the history and culture of CS2. The next section presents a narrative account of the first helpline training sessions for volunteers, which I observed in October 2014.

### 8.3.3 Helpline training

This is the first of eight training sessions for new helpline volunteers. The training is taking place in the training room within the building of the charity, which is next door to a kitchen and dining area. Chairs are arranged in a circle around the walls of the training room and at one end is a flip chart easel and table with a number of folders. On the sheet of paper displayed on the flip chart is written the name of the training and names of the three trainers: Klara, Nadja and Karen. There is a material banner hanging on one of the walls celebrating the rights of women.
The session begins just after six o’clock and 22 volunteers join the session, and the centre manager joins for the first part of the session. Nadja begins by providing some housekeeping information and then the trainers introduce themselves. The manager introduces herself and gives a short introduction to the charity, emphasising the importance of volunteers to the work of the charity. She explains the different services the charity provides and her role as manager, and then draws a diagram on the flip chart to show how volunteers are both at the top of the charity as trustees and also at the bottom as counsellors and helpline workers carrying out the bulk of the services. She says that the charity employs only three paid staff members, two of whom are part-time. The manager then sits down and offers to answer any questions volunteers may have. She assures volunteers that they do not need to worry about ‘saying the wrong thing’ on the helpline because the most important thing is listening and believing the callers.

The manager then returns to the upstairs office and the trainers emphasise the importance of attending every training session. They hand out folders and ask the volunteers to introduce themselves. Nadja then suggests writing a group agreement for the course of the training. Volunteers shout out suggestions for this agreement and the trainers write these suggestions on the flip chart and comment on each point. Points include confidentiality, disclosing personal experiences with caution, respect and non-judgement. Klara adds ‘no media stories’ to the agreement, as she says news stories reported in the media can be a distraction.

Nadja returns to the flip chart and draws a diagram of what she explains as ‘Yerke-Dobson’s Law’. This is a psychological model explaining the relationship between stress levels and performance, and Nadja discusses how this relates to calls on the helpline. She then encourages the group to think about how they cope when they have overwhelming feelings. She hands around some post-it notes and asks volunteers to write down their coping strategies. Nadja reassures the volunteers that these will not be shared, but are intended for their own reflection. She says that these coping strategies
will be useful preparation for the training weeks that cover heavy topics like sexual violence and rape, as well as useful in preparing volunteers for challenging calls on the helpline.

At this point Nadja asks volunteers to complete the ‘hopes and expectations’ sheet within their folders. A volunteer asks a question about how many volunteers are accepted to work on the helpline and Nadja replies that actually very few volunteers end up working on the helpline because volunteers are busy and sometimes life gets in the way. However, she tells the volunteers that she never considers the training a waste if it is useful in their personal lives, or helps them challenge uninformed comments regarding sexual violence. Klara adds that they see the training as a mutual process and they give volunteers feedback throughout the training. There are a few other questions from volunteers and then the group has a 20 minute break. Some volunteers stay sitting on their chairs in the training room, but most go into the kitchen for drinks and snacks.

After the break, Nadja asks volunteers to talk about the ‘hopes and expectations’ sheet with the person sitting next to them. After ten minutes, the group is then split into three small groups, depending on their level of helpline experience. Each trainer takes a group to a different area in the building and the groups have a discussion about what they think makes a good conversation. One volunteer within each group writes down points made on flip chart paper. After 20 minutes the groups come back to the training room with their flip chart paper. Nadja and Klara then model a role-play of a helpline call, as this will be one of the main training activities. The role-play lasts for ten minutes and afterwards Nadja asks the volunteers what they noticed about the call.

During the last five minutes of the training session, Nadja asks the volunteers what they thought worked well today and Karen writes their responses on the flip chart. The trainers thank the volunteers for coming and end the session. Some of the volunteers stay to chat to each other for a while before leaving the building.
8.3.4  Vignette: Joni

Joni had previously volunteered within a large international charity, which she had not enjoyed, so she had deliberately chosen to volunteer at CS2 because it was small and local. She was also very interested in women’s issues and considers herself a feminist. When Joni initially signed up to volunteer at CS2 she had no idea that the training would last for eight sessions. However, she was pleased about the length of the training because she felt this would prepare her for the demanding nature of the volunteer role.

In terms of volunteering experience and listening skills Joni felt fairly prepared for the role. She works at a large university supporting students, which involves dealing with problems in a sensitive manner. However, she found that the listening skills she learned in the helpline training were useful to draw upon in her work role and talked about using some of the same phrases she had learned to use on the helpline. She also enjoyed learning about the psychological models Nadja used during the training and related them back to her Sociology undergraduate degree. Joni said that she had not expected the training to involve a detailed understanding of trauma and had imagined it would just cover responses to particular calls. Instead, during the training, Joni felt that she ‘was learning’, which she did not expect. Joni did not feel that the training had challenged her views around sexual violence but said that it had made her feel ‘sadder’ about it, particularly the session about rape and the law. Joni looked forward to attending the training sessions every week and also enjoyed being in the company of the other women volunteers. She described talking about sexual violence every week as draining, but said that the grounding techniques included at the end of each session were useful for dealing with learning about such challenging topics.

The experience of participating in training encouraged Joni to successfully apply for a sexual harassment advisor post at her work, which is in addition to her current job.
During the first meeting in this post she said she drew upon the techniques she had learned during the helpline training. Joni also enrolled in a counselling course at a local college and said that she felt ‘empowered’ to do this course by the CS2 training. Initially Joni was nervous about starting the training but had enjoyed the experience and is now confident that she can do this type of work. Joni described the training as having a big impact on her life. It encouraged her to take on more responsibility within her work role and she also talked about how inspiring she found the trainers. She said it was their attitude and support, plus the support from all the other volunteers, which made learning about challenging and often distressing topics worthwhile. She feels proud of herself for completing the training and is proud to be part of the charity.

8.3.5 Main Themes

The previous sections provided a description of CS2, the training it offers to volunteers and a particular experience of training from one volunteer. The following section presents the main themes identified from the CS2 data, which include position, historicity, transformation and new possibilities. Each theme will be discussed separately, but their relationship to each other will also be outlined throughout the sections.

8.3.5.1 The unique position of volunteers: ‘there’s no way that I should know the answers’

Volunteers in CS2 described how they looked forward to attending training every week because they were ‘interested in learning about something I’m really passionate about’ (Joni). This value placed on the object of the volunteering activity influenced how volunteers were positioned within the charity and their access to training practices. Nadja expressed that volunteers ‘deserve the training’ because of the activity they are involved in:
If they give the time, the commitment to support people who are really in a place maybe of darkness, of a place of – my life is just falling apart, I’ve been raped, all the consequences on their mental health, on their family, on their friends, on themselves. People are prepared to give that, then they should be supported and trained. (Nadja)

The value that volunteers placed on the object furthered their motivation to engage in training practices:

Talking about the reasons for the training though, I don’t want to do it badly. I don’t want to engage in some voluntary work, and this is crucial work for women, and do a poor job. So the training is crucial, but it also makes volunteering more appealing, the fact that you gain skills. (Stephanie)

Volunteers also placed a lot of value on training because they felt a lot of trust towards the trainers. This was expressed by many of the volunteers I interviewed when they spoke about a desire for more feedback from the trainers during the role-play activities. For example, Harmony talked about one of the trainers providing feedback on a role-play activity she was involved in:

[T]hat was quite nice to have because obviously as volunteers we’re pretty much on the same level of ignorance, so we’re not really sure if what you’ve said is really helpful because it’s just another person like you who’s being really nice. So it was nice to have a sort of critique. (Harmony)

Harmony and other volunteers expressed a desire for ‘more able partners’ (Luckin et al., 2003) to help them advance their learning, which is a vital part of learning within a ZPD. Training became a ZPD as volunteers were supported by more knowledgeable subjects and where their emotions and the historicity of the system were mediated to provide support. For example, Nadja described how existing volunteers provided continuing support to new volunteers:

[T]hey see they have been helped and supported to lose their fear from the helpline to really get going and they have received that help not just from us but from other volunteers. And then, when a year later, I ask again who would feel ok to let people shadow? Then those people remember, oh yeah, these people have helped me so I’m now willing to help the next group. (Nadja)

However, positioning themselves as without experience, or even as amateurs, could limit the motivation of volunteers to further their learning around the object. This situation was described by Joni when she talked about independently trying to learn more about the law in regards to rape:
I looked at the law stuff briefly. Just because I didn’t want to give someone wrong information, but everything I saw was really long and convoluted! So I thought I’m just going to stick with what they told me at CS2! [laughs] This is doing more harm than good! (Joni)

This amateur position also impacted on the interaction of volunteers in dialogue within training practices. Justine expressed feeling restricted in how open she could be within this position: ‘there’s always the worry, what if I say something really inappropriate or just wrong – it’s in front of my peers so what are they going to think about me?’ This position also restricted the value volunteers placed on learning from each other in the role-plays and they expressed a desire for feedback from the ‘professionals’:

I liked the fact that they [the trainers] sat in with us and gave us feedback because without that I don’t think we would have known, well I wouldn’t have known if I was doing right or wrong. You think you are but you need feedback from an experienced person. (Gina)

Some volunteers deemed the feedback they received from each other as not like ‘getting proper real feedback’ (Sophia). However, Rebekah and Justine described how through ‘being on the same level’ had enabled them to learn from other volunteers during the role-plays:

[[It’s just really interesting to see how different people react to the same sentence. I found it really interesting how perhaps I would pick up on something at the end of a sentence and they would focus on something at the beginning and you can kind of see how the call could have gone in different ways, which is really interesting I think. It taught me quite a lot because it’s nice to hear, and that’s what nice about the shadowing as well, it’s nice to hear how other people speak, react to things. (Rebekah)

The position of volunteers as ‘amateurs’ within the system of the charity also provided them with a sense of freedom in their learning. Rebekah described feeling able to ‘ask the slightly ridiculous questions’ as she had ‘no embarrassment about not knowing the answers because there’s no way that I should know the answers!’ This sense of freedom with regard to learning may also be explained by the freedom volunteers had over the object of activity. The object of sexual violence motivated all volunteers in their volunteering activity, and their choice to act on this object created ‘positive emotional valence’ (Roth and Lee, 2007). Joni described the training as ‘really rewarding’ and expressed pride in completing the training course: ‘I feel proud that I’m going to
become a volunteer there. I think I have pride saying yes I volunteer with CS2. Yes I do feel proud of it.’

Volunteers positioned themselves as feminists, which linked them to the values and history of the charity. In the focus group the volunteers discussed how the suffragette history within the building of the charity motivated them in their volunteer activity. Training was also a tool through which volunteers felt a sense of belonging and the volunteers described what they felt was a unique experience of being in the sole company of women during the training:

[O]ne of the main things I enjoyed that I’ve never been is being in a room with that many women before. And I loved it! It was so great. One of my favourite things! I really looked forward to going to it because being in a room with like 15, 20 women who all share the same – everyone is going to be nice who volunteers there aren’t they? And everybody had the same kind of idea and interest in women’s issues and interest in this topic, and everyone was so supportive. It was just so nice being around women I think! I haven’t been around that many women, just women, in like – ever! [laughs] (Joni)

This shared experience helped to create intersubjectivity through which subjects coordinated their work on the object of sexual violence (Williams et al., 2007). Being in the same group every week during the training helped volunteers feel as though they were ‘developing together and you’re comfortable with each other’ (Terry). However, this sense of belonging and community may be missing in the volunteering activity, as Rebekah described:

[W]hen I came to the shadowing a girl called [name] was doing it and if we weren’t there she was on her own. And I was thinking God! You just come in, do your three hour shift, hopefully there’s someone else there and then you go home and you don’t know what’s happening. (Rebekah)

Nadja also described how the bonding that occurred in training did not necessarily continue into the volunteering activity:

But I’ve noticed that there are groups that would organise going to the pub together afterwards, and it looked really good but actually hardly anyone of that group ever came to the helpline. So they gelled as a group, they hung out they socialised, they had a brilliant send off after the last [training] session, went to the pub, had a real sing along, but only two people out of a very large group ever came and worked on the helpline. (Nadja)
Therefore, while volunteers were motivated to act on the object and felt a sense of belonging through training practices, this motivation and belonging could be lost in the wider volunteering activity.

The next section outlines the historicity that also positions volunteers within the volunteering activity, and how this historicity is re-mediated through practices of training.

8.3.5.2 Re-mediation of historicity: ‘how I feel about rape has changed and is changing’

Volunteers came into training with their own historicity, which was re-mediated through training practices. For example, Hayley and Stephanie reflected on their own historicity in the focus group and discussed how their perspective on their previous experiences had changed:

Hayley: I’ve not really had any barriers to my career and other things, actually probably benefited from being a woman in society, so this kind of makes you reflect back on all of that.

Stephanie: Even the language you use sometimes you know it can be really subtle differences, because I was the same. I think I’ve never been discriminated against, I’ve never had to deal with any major issues but then –

Hayley: You think back and think actually I have.

[laughter]

Harmony also described drawing upon knowledge about active listening she had learned in training to reflect on a previous experience in a different activity:

When I was working with the women in the criminal justice system, they were getting a BTEC in drama and performance and that involved some written work and for some of these women that was quite difficult, quite challenging. And I had promised one woman that I’d help her with her piece and she wanted me to help, and I was kind of eating my lunch and I didn’t have enough time and I sort of gave her advice and she completely broke down and burst into tears.

(Harmony)

Harmony went on to draw upon the culture within CS2 of self-care, which was an integral part of training practices and the volunteer activity. Terry described this culture of self-care as ‘part of the structure of what you do’ in the activity and ‘part of the package that they’re offering you as a volunteer’:
I wish I’d sort of known, a lot of the [CS2] training is sort of taking care of yourself and I wish I’d been able to say, now’s not a good time for me let’s sit down later, and then when we’d sat down I could really give her the space to tell me everything first before I told her what I’d do. (Harmony)

Finally, Harmony described the realisation that her actions of ‘telling her what I would do’ had been ‘quite a destructive thing’:

It made her feel very inadequate and if I’d had that training, that active listening – I sort of really understood what Klara was saying about not jumping in there with loads of advice. And I sort of gave that as an example of how sometimes our own experiences can be a negative thing to share. We need to really listen first. (Harmony)

Harmony had been able to reflect on her previous experience mediated by the principles of self-care and active listening learned in training, which had created new learning that she went on to exchange with other volunteers. Through this process of re-mediation, volunteers within the charity were able to gain a new perspective on the object of sexual violence, and their relation with it, as Harmony described:

I think there was a point in the process where I was really reflecting on my own history and looking at things in a new light, which I found quite unsettling because it’s difficult to think that you’ve been sexually assaulted. People don’t want – but I think that was also quite important and I think that if lots of women and young girls spoke about these experiences I think you’ve actually got them all in common I think, unfortunately. (Harmony)

Through the practices of training Harmony was able to connect her personal experiences, or ‘unique contribution’ (Stetsenko, 2012), with the wider object of activity. It is this connection, even if it is ‘unsettling’, that motivates her in the volunteering activity:

But I think it’s important to come to terms with that as well. So yeah, so in a personal way how I feel about rape has changed and is changing, but I think that’s really good. I think more people should engage with those thoughts rather than ignoring them, so we can change it. (Harmony)

Rebekah also described how the connection she felt to the topic of the law, which was covered in one training session, made it ‘more kind of within my ability to understand’ than ‘stories of women’s prolonged abuse’. However, it was this connection and ‘familiarity’ with the topic that resulted in this session being the most challenge for Rebekah and ‘the one, like, I really took home with me’.
In the focus group, volunteers talked about how they thought they were aware of sexual violence before participating in training, but the training had challenged them in ‘accepting those facts’ (Hayley). Participating in training had even led some volunteers to re-evaluate their previous knowledge about the object, as Joni commented:

> But I felt like I took so much from the training. I think I thought I had more knowledge than I did at the start, then at the end I was like – oh well I knew nothing! [laughs] (Joni)

Stephanie agreed:

> I didn’t have the knowledge, it’s frightening really, I’m an intelligent woman, I know what’s going on and then you spend a few weeks in a room full of people, some experts and it just widens you completely. I was actually oblivious to a lot of things and I didn’t know much at all actually. (Stephanie)

This change in perspective was particularly linked to the complex object of sexual violence:

> I think that there’s [sic] a lot of issues around sexual violence and obviously you’re dealing with women in very difficult situations. Although I kind of assumed that I would be capable of listening and supporting those women, the depth and wealth of information I got on that training course made me realise that there’s a lot more to it than that. (Harmony)

Terry, who had professional experience of working within the area of domestic violence, said that although she knew ‘all the stats and the systems’, during the training she had been confronted with ‘the actual deep impact on an individual’. This confrontation particularly came from the role-play activities. Rebekah described how the multiple voices included in these role-plays brought the object of sexual violence to her attention:

> I think some of the case studies or role-plays that we did with examples, especially when we did one and Karen was observing us and she obviously had spoken to the woman that the anonymous case study was based on. And that really hit me because I was like – oh that’s a real person, this happened to a real person. And that’s like, as you go on the phone that takes more and more getting used to. Like it’s not just scientific and a random list of horrible events, it’s an actual person. (Rebekah)

Multiple voices were deliberately brought into training practices as a tool for this kind of re-mediation. For example, Klara described a training session that involved volunteers being asked to share all the ‘judgements’ they have heard about women who had experienced sexual violence. Klara saw the process of sharing these multiple
perspectives of the object as integral in the process of volunteers learning to challenge themselves and, within their volunteering activity, gently challenge callers on the helpline. The challenging of these voices, or ‘re-orchestration’ (Engeström, 2008), helped expand the object of activity for volunteers. For example, Rebekah described how the practices of training had made her reflect on her previous reaction to hearing a news story about rape:

> [W]e were talking about it at work and I think I said something like – what was she doing walking there at two o’clock in the morning? Because she’d cut the corner or something, and it’s completely irrelevant! Like she should be allowed to walk where she bloody well likes! But that’s kind of like your instant reaction, like well I wouldn’t have walked there at two o’clock in the morning. So I think it’s really important that you just challenge that social conditioning all the time. Like if someone had said to me – what does that mean? Nothing, it doesn’t mean anything, it certainly doesn’t make it her fault. There’s no blame on her at all, but it is interesting how quickly you say – well I wouldn’t have done that. (Rebekah)

Therefore, through the practices of training volunteers began to re-orchestrate their own voices, which is a process regulated by the rules of the charity and the values held towards the object. Challenging voices that were outside these rules and values was an integral part of the training practice:

> [I]t is really important isn’t it so that other volunteers, you know, don’t get the wrong idea and know that those kinds of ideas aren’t acceptable here. So that everyone feels safe in actually what we are doing. (Klara)

Therefore, the rules and values of the system volunteers were training within were also tools that re-mediated their knowledge and experiences.

This section has described the process of re-mediation identified in this case, where the perspectives and experiences of volunteers relating to the object were mediated in a ‘qualitatively new way’ (Cole, 1996, p.285). The next section goes on to examine this process in more detail, focusing on the dialogic practices of training that provide opportunities for individual and social transformation.
8.3.5.3 Dialogue as a transformative practice: ‘you just don’t talk about it in day-to-day life’

For some volunteers, like Shauna, the training practices, at times, made the object seem unattainable:

I feel what eventually stuns everybody is that this is totally unresolved. We’re 2014, we can stand a military plane 90 degrees in the air, create concussion grenades, but we – can’t – solve – this [emphasised]. To any passable degree [...] There’s no kind of solution. (Shauna)

This description from Shauna presents the object of sexual violence as a ‘runaway object’: a ‘monster’ that threatens ‘security and safety’ (Engeström, 2009b, p.304). However, the practices of training for volunteers such as Rebekah and Sophia, transformed sexual violence from ‘a really embarrassing, scary topic’ (Rebekah) to something they could talk openly about:

I mean you couldn’t be on the helpline without the training, but it also changed the way I think about the world. Like the way I speak to friends now, I don’t sort out their problems for them anymore, I definitely do active listening. This training made me feel like it was ok to talk about sexual violence properly. (Sophia)

As in the study by Foot (2002) through participating in training understanding of the object had been transformed for volunteers, which had also transformed themselves. Such transformation of the object, and accompanying transformation of the activity system, indicates the process of expansive learning (Engeström, 2010). Rebekah described how talking about sexual violence on a weekly basis had brought the object to her attention: ‘it just makes you more aware of how you instantly react to it and how other people are reacting around you.’ In the focus group, Stephanie and Hayley spoke about how their transformed view of the object of sexual violence had transformed practices in their personal lives:

Stephanie: I think I was aware of the enormity of it – like you [to Terry] say, the stats and the depressing headlines that come with the subject matter, but what has been challenging for me is to do a bit of reflection on my conduct and my principles. And I was explaining before, it’s something really simple but I actually refuse – television programmes now – I refuse to laugh at certain jokes because without, I’m not voluntarily trying to part of a problem but I’ve never been conscious that by not acting or by doing something different that I am contributing to the problem.
Hayley: Like letting something go past and not saying anything you are actually allowing that to happen. A definite revelation for me as well yeah.

Shauna: It takes good men to stand by and do nothing for evil to happen.

Here the volunteers seem to be becoming aware of their own unique contribution to the object (Vianna and Stetsenko, 2011). Stephanie continued:

What I was trying to say is that I wasn’t conscious of being part of the problem, but not trying to challenge yourself, never mind other people, but by challenging yourself and what you do and what you consider acceptable you are part of that problem. (Stephanie)

In the process of becoming aware of this contribution to the object, or what Freire (1974) might describe as conscientização or ‘the awakening of critical awareness’, volunteers began to feel more able to act on the object. Rebekah described how after participating in training she felt ‘really different’ and able to talk more widely about sexual violence in a way that she felt she could not have done before:

And it’s one of the things Sophia said which is you never talk about it and I feel able to talk about it with other people. Like I told my Mum and Dad about it and I don’t know whether six months ago I would have been able to talk to my Dad about sexual violence! [laughs] But I was able to explain to him and have a conversation about it and I just feel much more like this should be talked about and I’m not going to be embarrassed to mention it or say anything […] The only way this is going to get better if it’s not this secret shameful thing. (Rebekah)

Rebekah is describing here the dialogic nature of training, which allowed volunteers to negotiate and formulate the object that they are working towards. Klara also described this dialogic process, which she considered central to training practices, because bringing the object of sexual violence into awareness for volunteers made them ‘realise the enormity of it’. Shauna also spoke about how the very practice of training drove the collective activity of volunteering towards the object of sexual violence:

[Training] clarifies that it matters. That it’s relevant, that it’s happening, substantially happening. And that people substantially care about it as well. That’s what I was kind of surprised to find a whole room full of people who give a shit and who are not completely apathetic, because the subject is apparently too big and too terrifyingly and the fantastically great white elephant in the room. Like you said [to Rebekah], you can’t have the conversation about it because it’s too unapproachable, too difficult. (Shauna)

Klara described how the dialogic practices of training continued into the volunteering activity and provided volunteers with ‘a shared understanding’, ‘a shared awareness’
and ‘a shared experience’. Sophia described this dialogic process, which was embedded in training practices, as creating a continual learning process for volunteers:

I don’t think the training ends here because you have the meetings or you have the opportunities to speak to Klara to help you improve. But you also sort of train yourself, when you put the phone down and you kind of think I should have said that better or I should have done that and you realise that nobody’s perfect, everybody makes mistakes. (Sophia)

Some volunteers in the focus group, however, spoke about the potential difficulties of the dialogic nature of training particularly in a large group, which could feel ‘intimidating’ (Terry) and ‘daunting’ (Stephanie).

As Miettinen (2005, p.64) argues, this process of dialogue and negotiation ‘both constrain and opens up new possibilities for joint activity’ as well as for the subjects involved. It was also through these dialogic practices that trainers enacted the rules of the system in order to protect the values of the object. For example, Nadja described herself and Klara as having ‘a loose eye on everybody throughout the training just to see how are they responding, how are they participating’. For example, these rules protected the values and stance of the charity towards callers expressing suicidal or self-harm thoughts. Both Klara and Nadja explained how this stance created contradictions for some volunteers who may have different values, particularly developed in other activity systems, such as statutory organisations:

[F]or some people that’s really hard to understand because the Samaritans work different from us [sic] and so the people who know Samaritans they say well they do it, but we don’t. We don’t call the ambulance, we don’t report. We talk to the person, we give them the helpline of the Samaritans who will report, who will call the ambulance and so, but it’s like about personal responsibility and it’s about supporting someone through – kind of how at the end of their tether they are and how suicide looks a very attractive at that point, but we are not taking charge and we have our good reasons for that. (Nadja)

Rebekah described how training provided a place to talk about such issues that ‘you just don’t talk about it in day-to-day life normally’, and where volunteers were ‘constantly being aware of the reason that we’re learning about it’:

Rebekah: I think CS2 have quite a different take on [self-harm] too, you know, as a creative outlet to keep the woman alive, to deal with whatever situation she’s in at the time. I think that’s quite a challenging viewpoint for a lot of people
I think, and it takes you a little while to be like – ok that makes sense, that’s logical. So I think that was quite interesting.

Me: Like you say, things that you don’t normally talk about?

Rebekah: Exactly you wouldn’t normally talk about! Having that sort of thing that really challenges how you react to people and how you see the world. Because it is slightly different than what you would expect. You can sit there and process it and be ok well that’s logical and I understand why and agree with it but it wouldn’t have been I guess my reaction if someone had asked me about it before the training. I would have been like, that’s awful! Try and stop them doing it! [laughs] I think that sort of thing challenges the way you think about things.

As the rules and values of the charity, or the system, have transformed Rebekah’s view on self-harm, this process has also transformed her own view of the world. For other volunteers like Terry, rules were less transformative to their own perspectives, but became a useful tool in their volunteering activity:

One thing that I found helpful was when they said – this is what we do here. This is the rule. You don’t have to think about it, this is our approach to something. So for example with self-harm, we were sort of told this is our approach to it – we don’t criticise a woman for doing it, we don’t urge her to stop. It’s about safety and if we’ve got to know somebody after a while we might talk about different ways of dealing with pain. So that we were given a response[ …] You know, as an organisation we do this, we don’t do that, and it takes away having a dilemma about how you respond. So I found that quite refreshing, just being told – that’s it, this is what we do. (Terry)

Within the rules of the system, certain knowledge was fixed and non-negotiable, such as knowledge regarding the law:

There are things, like around listening skills that we can kind of do this way or that way, but the law is the law there is only one way. You can’t say, well this could work or this could work, you have to know. (Nadja)

This fixed knowledge could create inner contradictions, which as the following quote from Rebekah shows, are manifested through emotions for the volunteers between their previous beliefs and imagined outcome of the object:

[T]he one like I really took home with me was the law session. It was just really depressing. Really depressing! And it makes me really angry. It’s really unfair and it’s really frustrating and I think that one – it felt more kind of within my ability to understand as well. (Rebekah)

As their perspective of the object is transformed, the perspectives of volunteers themselves and their wider position in the world are also transformed. Rebekah described how the session on the law had changed her own attitude:
I just came out of that session thinking, I don’t think I would. I don’t think I’d report it, and I always really kind of – because you talk about this when you’re younger and I was always like, no! Of course I would report it, it would be my duty to, I’d have to protect the public. But I just don’t think I would, it’s horrendous! (Rebekah)

This change in perspective could be described as a process of ‘becoming’ (Vianna and Stetsenko, 2011), which emerges from the subject-object transformation. The object, the societal challenge of sexual violence, was transformed for volunteers, who were also transformed by engaging in the activity of volunteering and dialogic practices of training. As Vianna and Stetsenko (2011) argue, teaching and learning both allow and are constituted by individuals acquiring the cultural tools that allow them to participate and contribute to social practices. Following this perspective, training in this case was not simply about ‘acquiring knowledge for the sake of knowing’, but was ‘an active project of becoming human’ through the ‘activist pursuits’ of volunteers (ibid., p.318). The activist pursuit in this case was acting on the shared object of sexual violence. Therefore, through participating in the practices of training, volunteers are able to move beyond adapting to the world and actively transform it according to their aspirations and motivations, as outlined by TAS (Vianna et al., 2014).

This process of transformation is not linear, but is continuous due to the dynamic nature of the object. Therefore, volunteers could be described as learning expansively as they ‘learn what is not yet there’ (Engeström and Sannino, 2010, p.2). Stephanie described this as the ‘eek moments, the gaps’ that she imagined would occur during the volunteering activity. Sophia also referred to this ‘gap’:

[T]here is still a gap because the training can’t give you the first call and the training can’t tell you what calls you’re going to get, because it’s life and it’s spontaneous and it’s random and you never know what’s going to be on the end of the phone. But it gives you the most skills it possibly can to put you in the right position to deal with that. (Sophia)

Therefore through the practices of training, volunteers can both access and contribute to transformative tools that are used to mediate their volunteering activity. This section has discussed the transformative practice of dialogue, which became such a tool for volunteers in their activity, as Sophia outlined when she described how this practice
enables volunteers to continually train themselves. The next section examines how these transformative tools were mediated to provide new possibilities within the activity for both volunteers and the charity, including the contradictions involved in this process.

8.3.5.4 New possibilities: ‘it’s actually quite a life changing thing’

New possibilities for joint activity emerged from the transformation of volunteers and the object of sexual violence. For example, Joni signed up to complete a counselling course after the training because she said she ‘felt so empowered’, and Terry drew upon the knowledge of trauma and grounding techniques in another voluntary role at a domestic violence charity. Sophia said that the training had ‘cemented that I wanted to work in sexual violence when I finish all my studying so it's actually quite a life changing thing.’ Justine talked about how she had shared the grounding techniques with her friends and also in her role as a first aider at work. Sophia outlined a situation where she had been able to provide guidance for a friend who disclosed someone she knew had been raped.

The dialogic practice of training also extended beyond the system of the charity, as the activity of volunteering for CS2 sparked dialogues in other activities and systems. Volunteers talked about their conversations with family, friends and work colleagues and Klara describes this outcome as volunteers ‘perpetuating the training’:

I suspect one of the outcomes is that trainees will be talking to other people in their lives about sexual violence [laughs] and having conversations about it that they may not have been doing before doing the training. And that will probably be about their understanding and their confidence and knowledge [laughs] and the fact that people might say, you know, why are you volunteering there for? I think that’s probably an outcome for everybody who does the training. (Klara)

The system of the charity was also transformed as subjects acted on the object, particularly by taking multiple positions. For example, Nadja entered the system as a volunteer to participate in the helpline training, but had been supported by CS2 to become the main helpline trainer. She drew on her experience of feeling ‘overwhelmed’ by the large volumes of sexual abuse cases during the training she had participated in
and, through rewriting the training materials, had shifted the emphasis on to listening
skills.

There were contradictions however, as volunteers imagined the activity and their
contribution to acting on the object that both allowed and limited the potential for
transformation. These contradictions manifested themselves in emotions, particularly in
this case ‘anxiety’ (Terry). Klara described how volunteers entering training tended to
imagine the worst outcome in their activity: ‘somebody always says, what do you do if
someone rings and they want to kill themselves? [laughs] You know it comes up
straight away.’ Contradictions in this case seemed to arise from the challenging subject
area of sexual violence, which volunteers described as ‘stressful’, ‘a dark subject’,
‘disturbing’ (Justine), ‘depressing’ and ‘heavy’ (Harmony). Harmony described the
necessary process of exploring emotions around the object of sexual violence during
training, including: ‘the anger and that kind of upset that you feel about like all the
issues involved’.

A further contradiction between volunteers and their ability to act on the object was
described by Nadja as she spoke about the session that covered rape and the law:

[[It’s so black and white, there is so little success in prosecuting and what the
women go through to go to trial and not have prosecution and a judgment at the
end. I always find that session very heavy. I always find that kind of the whole
mood of the group usually goes like – wow, this is the stark reality. So no matter
how well we support someone on the phone and build them up and everything,
that’s the harsh reality of how it is. And I find that quite challenging. And to find
ways of bringing that session across without crushing people, and without,
without kind of destroying the hope really that they could do some valuable
work. (Nadja)

The contradiction outlined here by Nadja is that no matter how well volunteers support
callers to the helpline, the ‘harsh reality’ is that justice through the law process is
unlikely. The contradiction between this harsh reality and the desire of volunteers to act
on the object could be identified when volunteers talked about the destruction of their
previous beliefs in relation to this topic of the law:

I had assumed that if somebody called and said, what’s the procedure for
making a complaint with the police? It would be quite like, oh you feel ready to
do this, oh good, let’s – but it’s not. It’s like, oh you be aware that this is a long
arduous process that maybe won’t have any positive impact for you whatsoever. So it’s just one of these, like the realisation that these crimes are going to go unpunished […] And I suppose I like to have faith in our justice system. (Joni)

Rebekah also spoke about crimes of sexual violence going ‘unpunished’, which shows how the inner contradiction emerging from this realisation almost paralyses her ability to act on the object:

There’s no way you can get away from it. It is what it is. This is what happens and it just – it makes it really difficult to get a conviction, which therefore makes it, you know, that’s actually a thought in people’s minds as well that they can get away with it. So it kind of feels like it’s self-fulfilling, like it’s the cause as well – like it’s the end result and because that end result is failing, I feel like it causes more violence and I feel like that’s rubbish! [laughs] (Rebekah)

Like Joni, Rebekah also described a personal contradiction between her faith in the justice system and what she was learning in the training:

But I kind of had a weird reaction to it as well because I feel really passionate about the justice system as well. I feel like we have to trust it! If we don’t trust it, it’s so so weird! But if we don’t trust the justice system then everything else just falls down. (Rebekah)

However, through the shared practices of training involving the development of shared values towards the object of sexual violence, volunteers still felt able to work on this object:

I feel like it will be worth it. I think that’s my overriding feeling with the training – yeah it was hard and the topics it was sad, it was difficult but it really just feels worth it […] Just Klara, she works there and she constantly said how rewarding it was and how deeply she feels about these issues. And it did feel like a really supportive environment. And the fact that all those other women felt the same way I did. It really is worth it. (Joni)

As Leontyev (2009) outlined in the example of the hunt, here emotions are reflecting progress in the volunteers’ understanding of the sexual violence, and they also help to drive the action towards future activity. In this process emotions are also transformed, as through the collective practice of training volunteers were able to transform their anger and frustration into determination.

This social transformation and wider awareness raising appears to be partly how the trainers imagine the object of sexual violence being acted on and is an integral part of the training practice:
We hope that some of the volunteers will be retained for actual work on the helpline in the future, but anyone who is trained, that knowledge will always be with them. So when they’re out there and a friend confides in them that they’ve been raped or sexually abused, if they’re a manager in a work situation and one of the staff discloses, if they’re out there in a nursing profession, in a school class with children. It doesn’t matter really, they will be able to use their skill and knowledge and experience of dealing with those people. The multiple effect of it. (Nadja)

I suppose as far as I’m concerned, you know, we do train people and they go out into the world and they never volunteer with us, and that’s part of, that’s part of managing volunteers! [laughs] […] But with helpline volunteers it’s always going to be an issue and to me the idea of women out there in their, just living their day to day lives, understanding a little bit more about sexual violence, understanding you know, the myths and that victims aren’t to blame. That feels like useful knowledge to impart whether people do stick with us and volunteer on the helpline or not. (Klara)

Terry also recognised the wider transformative potential of training: ‘it’s not just about taking somebody from A to B and getting them ready for a helpline, it’s about spreading the word’. Therefore, training does not only intend to transform the charity by producing more helpline volunteers, but it also aims to transform wider society by producing subjects that are more knowledgeable and aware of sexual violence and who are able to share this knowledge more widely.

### 8.3.6 Summary

The themes identified in this case included the unique position of volunteers within the system of the charity, and transformation, which included a transformation of the perspective of the object, volunteers and their environment, and new possibilities. This process of transformation is not linear, but is continuous due to the dynamic nature of the object. Through the practices of training, which involved the re-mediation of their historicity and the multiple voices within the system, volunteers were able to make a ‘unique contribution’ (Stetsenko, 2012) to the object of activity.

Processes of re-mediation and the re-orchestration of voices involved dialogue, through which volunteers transformed their perspective of sexual violence, thus expanding the possibilities for the object, themselves and the activity system. Dialogue was also extended beyond the system of the charity, which enabled wider awareness
raising. The rules of the system were enacted through these dialogic practices, which aimed to protect the values embedded in the object of activity. These rules also became tools within the volunteer activity. Through practices of training volunteers were confronted with contradictions within their volunteering activity, which manifested themselves in emotions. In confronting these contradictions volunteers were personally transformed, which also transformed the charity and their wider environments creating, as Nadja described, a ‘multiple effect’.

Their position in the charity and the stance they took towards the object, motivated volunteers within their volunteering activity. Training created a ZPD as volunteers were supported in their learning by more knowledgeable and experienced subjects. Training also created intersubjectivity through which subjects coordinated their work on the object of sexual violence. However, while volunteers were motivated to learn within the system, their motivation for independent learning outside the system was restricted. Furthermore, while training helped to create opportunities to strengthen the community of volunteers, this community did not necessarily continue into the volunteering activity.

8.4 Case 3: ‘just using the terminology in everyday life’

8.4.1 Introduction

In this case (CS3) I interviewed staff members Alex, the volunteer manager, and Joshua, services advisor and trainer for peer support volunteers. Volunteers Jacqueline, Brett, Kayla and Alaia attended the focus group and I individually interviewed Jacqueline, Brett, Kayla, Alaia, Michael and Alejandro (see Appendix 2 for further information on participants).
CS3 provides a range of services to anyone living with, and affected by, HIV in North West England. HIV stands for Human Immunodeficiency Virus and is a virus that attacks the body’s immune system. The charity was founded in the 1980s by six gay men as a voluntary helpline, when HIV was first identified in the city. At this time no treatment was available for HIV, which meant the condition would lead to AIDS (Acquired Immune Deficiency Syndrome) where the immune system became severely weakened, resulting in opportunistic infections. Jacqueline, a HIV volunteer who has volunteered at the charity since 1990, described the situation at this time as ‘people’s life expectancy was not long.’

This situation changed in 1996 when antiretroviral drugs became available for the treatment of HIV. For people living with HIV who accessed and adhered to this medication, HIV became a liveable condition, rather than a death sentence:

> Well ‘96 was when combination therapies came out, so a very quick transformation from people generally expecting to die quite quickly to generally the situation we’re in now where it can be seen as long-term survivable condition, say like kidney disease or diabetes. And that’s a huge change. (Jacqueline)

This change in the treatment of HIV led to changes in the needs of the population CS3 was serving and the services of the charity expanded. The first paid staff roles were funded in 1987 and in 1994 CS3 moved into the premises it occupies today, which are based near the city centre. From the year 2000 the demographic of people using the services of the charity began to change from being predominantly gay and bisexual men to including higher numbers of people from African communities. The services of the charity changed to support this new demographic and services were provided that aimed to support people from different countries. For example, crisis payments and food packages were provided for destitute asylum seekers. Today CS3 sets out two main areas that it describes as its vision. Firstly, that all people living with HIV in the North West are able to live happy and healthy lives and be free from stigma and
discrimination. Secondly, that everyone knows their HIV status and is HIV aware. Stigma is a huge issue that is perceived to differentiate HIV to other health issues:

[T]here are very very few other conditions that attract stigma apart from people with mental health. Because nobody’s going to get stones thrown at their house because they’ve got cancer, or graffiti or whatever, you know. (Jacqueline)

Alex, the volunteer manager and trainer at the charity described the ‘range of myths and different attitudes around HIV’ that remain a challenge.

In the latest annual report from CS3, the organisation describes a ‘collaborative approach’ to delivering services, between service users, staff and volunteers. From 2014 to 2015, the report totals the number of hours volunteers gave to the organisation as 9,704 and a further 980 hours were spent on volunteer training. From the Charity Commission website, during the same year, 125 people volunteered at the organisation alongside the 15 members of paid staff. These volunteers perform a variety of roles including administration support, service delivery support, fundraising and, as in CS1, specialist volunteers who bring particular skills into the organisation.

The website of the charity describes volunteers as being at the heart of the organisation and in her interview, Alex emphasised the mutual beneficial relationship between volunteers and the charity. The description for each volunteer role is available from the charity website, which includes the purpose of the role, key activities, expected time commitment, required skills and experience and details of required training. Alex outlined three main areas of training that are provided for volunteers, which include a compulsory volunteer induction, specific role training and annual update training. Alex also explained how she viewed training as a way of extending the ‘pool of people you can involve as a volunteer’ as volunteers did not have to come to the charity with the necessary skills and experience. In their interviews, volunteers spoke about more informal modes of training such as shadowing more experienced volunteers and attending meetings relevant to their roles.

The induction training included: understanding HIV and the experiences of people living with HIV, understanding CS3 and the services offered, the background and history of
the organisation, and issues around safeguarding both service users and volunteers. Training was mostly provided through face-to-face group sessions. For volunteers involved in one-off events, rather than attending the two day induction training they were given a short briefing session, either in a group or online. The charity also has an e-learning platform that provides online learning materials for volunteers. Training is provided separately for staff and volunteers and Alex explains that this is due to the large number of volunteers in the charity who are also accessing services, which creates a blurring of boundaries between the roles of volunteers and service users. She says that staff need to be able to discuss experiences of their role within training and if volunteers and service users were in the session, issues of confidentiality might be breached.

This section has provided an introduction to the history and culture of CS3 and the position of volunteers within it. The following section provides a narrative account of HIV update training for volunteers, which I observed in November 2014.

### 8.4.3 HIV update training

This session is taking place in the large open space training room at the charity. The room has a small kitchen area, a sofa area and a main training area in which chairs are arranged in a semi-circle facing the screen where a PowerPoint presentation is projected. Next to the screen is a flip chart and pinned to the wall is a sheet of flip chart paper with ‘parking bay’ written on it. The trainer, Alex, will use this throughout the session to write any questions she cannot answer and will look up after the training session. A list of ‘ground rules’ for the session are also written on a sheet of flip chart paper and stuck to the wall. Rules include no mobile phones, confidentiality, listen and respect. These rules are briefly referred to at the beginning of the session but not discussed in detail. Fourteen volunteers attend this session who are working in roles
supporting service users and are undertaking this training session to update their HIV knowledge.

The session starts at 10.15am and Alex asks volunteers to introduce themselves. Alex then tells the group that she is not a scientist and might not be able to answer every question, but will keep a note of questions she does not know in the parking bay. Alex also tells the volunteers not to worry if they do not know the answers and that it is fine to make mistakes, because that is how we learn. She says she does not want volunteers to feel under pressure to know everything and this is their opportunity to ask questions.

Alex presents an outline of the training session in a PowerPoint slide. She then asks the group to work in pairs to discuss what they each would like to get out of the session. She hands around some post-it notes for the volunteers to write down their points. After five minutes each pair feeds back to the group and one person from each pair sticks their post-it notes onto the flip chart. Alex comments on whether the session will include these points or whether it is something she will email to them after the session. Alex then hands round sheets of A4 paper with a HIV related term written on, including HIV, AIDS, CD4 count and viral load. She asks volunteers to take one and come up with a clear definition that could be understood by a service user. She puts some booklets on the floor, which volunteers can refer to during the activity. After ten minutes Alex asks volunteers to share their definition with the group. As volunteers give their definition, other group members add to it and ask questions about it.

At 11.15am the session breaks for 15 minutes and volunteers make hot drinks in the kitchen and a few people go outside for a cigarette. The training session resumes at 11.30am and Alex says she will follow on from the terminology covered in the previous activity with a refresher on HIV transmission. She presents a series of points on the PowerPoint presentation, including the factors that must be present for HIV to be transmitted and the factors that affect the likelihood of HIV transmission. One volunteer asks how long HIV can survive outside of the body and Alex writes this in the parking bay.
bay, as she says she does not know the exact figure. However, she reinforces that HIV needs a direct route into the body.

Alex then gives volunteers a sheet of paper each containing a list of statements and asks them to decide in pairs whether these statements are true or false. The pairs distribute themselves around the room, and mostly sit on the sofas at the back of the room to complete the task. After 15 minutes the group returns to the main training area and Alex goes through the statements asking people to raise their hand if they thought the statement was true or false. Alex then presents a PowerPoint slide about the question of whether there is a cure for HIV. She explains how HIV incorporates genetic material into cells, so the challenge is how to eliminate reservoirs of HIV that can be hiding in latently infected cells. She says there is confusion in the ‘outside world’ about the difference between the viral load being undetectable and HIV being cured. Alex talks about some well-known examples that the volunteers are familiar with, including The Mississippi Baby, The Boston Patients and The Berlin Patient, who is the only person known to be cured from HIV using a bone marrow transplant.

Alex turns to a new PowerPoint slide and talks about the law in relation to HIV transmission. Alex explains to the group how the criminalisation of HIV could increase stigma and also discourage people from getting tested to know their status. The group discusses more about CD4 count and different approaches in different countries, as well as HIV home testing kits. After this discussion Alex returns to the PowerPoint to talk about ways of preventing HIV transmission other than condoms. These include having an undetectable load, Post Exposure Prophylaxis (PEP) and Pre-Exposure Prophylaxis (PREP), which Alex says they will be discussing in more detail later in the session. Before the lunch break Alex talks through a PowerPoint slide about HIV positive healthcare workers, which was a statement from the earlier true or false exercise. A discussion takes places about the Equalities Act, which Alex says is a very powerful tool in protecting the rights of people living with HIV.
At 12.45pm the session breaks for lunch. Sandwiches and snacks are available in the kitchen and most volunteers help themselves and go back to their seats. A few volunteers go outside. During the lunch break Alex shows a video from the recent AIDS Melbourne conference where speakers are discussing HIV treatments and talk about the Mississippi Baby and Boston Patients. After lunch Ian, who is a staff member, joins the group to lead a one-hour session on the issue of ‘treatment as prevention’ of HIV. This is a new and emerging area within HIV and Ian encourages volunteers to talk about it with the service users they support. After this session there is a 15 minute break and then Alex facilitates a group activity on HIV statistics in the North West and what these mean for the services of CS3. At 3.25pm Alex brings the training session to a close by asking the group what they feel they have learned and summarises these points on the flip chart. Most volunteers stay and chat with each other for a while before leaving.

8.4.4 Vignette: Kayla

Kayla had been volunteering within the charity for six months when I interviewed her. She had started volunteering after looking at some volunteer roles on the website of the charity and then attending a volunteer induction training session. Kayla had volunteered for two of the large public events the charity is involved in, which mainly involved engaging the public and raising awareness of HIV. Kayla said she had experience of event management through her paid work, but talked about the freedom she felt in doing this work in a voluntary capacity. Kayla also supports service users in groups at the charity. She is hoping to get involved in supporting service users on a one to one basis but is waiting for further information and support around this role. Kayla felt like she already knew about scientific knowledge relating to HIV from her work background, and she felt the training had mostly provided her with the terminology of HIV that could be used sensitively and in relation to service users, as
well as the different perspectives of people affected by HIV. From the training she
gained confidence that she would be able to support service users. The terminology
she had learned about in training also had become a tool for Kayla to use in awareness
raising that reached beyond her volunteering activity. One of the most memorable
moments of the training for Kayla was hearing the opinion of a fellow volunteer, which
went against the values of the charity and stigmatised a particular group of people
living with HIV. However, she described hearing different perspectives and opinions in
training as useful to her learning process.

For Kayla, the formal training sessions were more useful than the more informal
shadowing that she had experienced for supporting the group spaces. She felt the
more informal training was dependent on the personality of individual volunteers and
that if someone was shy then they would struggle in the more informal situations. Kayla
also expressed a lack of training around the one to one support she wanted to do for
service users, which is preventing her from moving forward in this activity as she does
not want to ‘mess it up’. Supporting service users in a manner that is in line with the
values of the charity was a main priority for Kayla. As well as feeling more confident to
support service users and challenge stigmatising views, Kayla felt that her participation
in training and in the activity of volunteering had made her feel part of a community.
When she began volunteering, Kayla did not have a specific career goal in mind, but
now she has had some experience in the charity sector she thinks it may be a place
she would like to work in in the future.

8.4.5 Main Themes

The previous section provided a description of CS3, the training it provides to
volunteers and a particular experience of training from one volunteer. The following
section presents the main themes identified from the CS3 data, which include the
object, values, position and transformation. Each theme will be discussed separately, but their relationship to each other will also be outlined throughout the sections.

8.4.5.1 The dynamic object of HIV: ‘things are changing so fast’

The object of activity is formulated and realised through a collaborative process, involving different perspectives and voices within a system (Engeström, 2008). In the volunteering activity within CS3, these voices belonged to both volunteers and service users as Kayla described:

[Y]ou’re working with people who - some people do divulge their status, which I think might be a different and unique experience to some other organisations you might find yourself working for as well. You know, charity-wise it is how does it affect you personally? And I guess for CS3 it’s quite impactful how it can [emphasis] affect somebody personally as a volunteer as well. (Kayla)

Kayla went on to describe how these multiple voices motivate her to continuously learn about the object of HIV:

[I]t’s understanding that it’s not just about the service user that you’re working with, but it’s also about the other volunteers around you and reassuring that you have your knowledge correct for their benefit. As much for their benefit as much as anyone else’s as well, so you are learning all the time and understanding. (Kayla)

The stance Kayla takes towards the object and specifically the service users of the charity, motivates her to both learn about and act on the object.

Multiple voices are both implicitly and explicitly brought into the practices of training, which places these individual voices within a wider societal context (Vianna et al., 2014). For example, Kayla described the diversity of voices and experiences of volunteers within a training session:

[A]ll the volunteers came through all the communities of [city] so you got different people’s perspective and understandings of people living with HIV. You know, the medical side of things and just all the myths and things like, which sometimes people were still bringing to it as well. So it was interesting to hear different perspectives. (Kayla)

More explicitly, training involved role-plays and scenarios that provided volunteers with different stories of people living with HIV that allowed them to ‘put yourself in another person’s place’ (Jacqueline) and contribute their own voices to these stories through
discussion. Therefore the development of the object is relational and, through the practices of training, it is worked upon through negotiation and dialogue (Miettinen, 2005).

This relational process means that the object is continuously evolving and could be described as ‘a transitional being’ (Engeström, R., 1995, p.202) or ‘a moving, motivating and future-generating target’ (Engeström, 2011, p.77). This dynamic object requires an ongoing process of learning for all subjects within the system, because the object of learning is never fixed. Michael expressed the value he placed on regularly organised training in the context of the ever-changing environment to help understand ‘where everyone’s knowledge is’. One of the reasons this knowledge was systematically taught in training was the importance of the history and sociocultural practices behind the scientific concept of HIV (Vianna and Stetsenko, 2011). The historicity of the object itself is a part of training, as volunteers learn about how people living with HIV were previously treated, medically and socially, as well as medical advancements such as PREP and PEP:

[T]hings are changing so fast that a lot of people don’t know the difference between PREP and PEP, and being able to tell a service user - that is very important. Yeah, so I think more update training would be good. (Brett)

Particularly important to the history and culture of the object of HIV within CS3 was the stigma surrounding HIV. Understanding knowledge of the object enabled volunteers to address this stigma and transform their own everyday knowledge (Hegegaard and Chaiklin, 2005): ‘the more you understand, the more knowledge you can impart to someone else and try and break that stigma by explaining to somebody the reason why’ (Brett). In the focus group volunteers expressed the importance they placed on knowledge distributed in training because they viewed it as being legitimised by the charity and developed within the system in which it can be enacted:

Kayla: And reading about it is one thing and doing your own, you know, bit of research, but to actually have that interaction and have it explained to you in a way you can understand–

Jacqueline: And also where, you know the information you’ll get from here is sound it’s not going to be biased, it won’t be wrong–
Kayla: Exactly
Jacqueline: which it easily can be off the internet.
Kayla: And you can use it in the context of, like you [to Brett] say, speaking to
service users as well.
Training provided the opportunity for volunteers to learn about the concepts related to
the object of HIV in their ‘practical relevance’ (Vianna and Stetsenko, 2011). Similarly,
Michael emphasised the importance of scientific knowledge on HIV treatment and how
it works in the body to his ‘everyday interactions with service users’:

Then when you have like a two minute conversation with someone who might
be really stressed or maybe just might have a hard time adhering to medication
or to services or care, I guess that you understand how their life is affected by
HIV and their commitment to medication and care. I think that is really
important. (Michael)

Therefore, the scientific knowledge made available to volunteers through training
practices provided an insight into the everyday experiences of people using the
charity’s services. That this scientific knowledge was developed from ‘above’, by the
charity and through practices of training, rather than from ‘below,’ (Rowlands, 2000) in
the everyday experiences of volunteers became apparent as the trainers talked about
volunteers who were living with HIV themselves but actually had very little knowledge
about it:

[T]he amount of people who are five, ten, fifteen, thirty years diagnosed who -
their HIV knowledge is shocking! I spoke to someone who’s been diagnosed for
32 years a month ago who didn’t know what CD4, viral load, the key clinical
measurements were. Had no idea but would actually profess to be a HIV
positive expert in terms of their experiences. So the best thing about the training
as well is without making assumptions, delivering a package so that then you
know as an organisation, you can say we’ve made sure that we’ve covered all
of this. (Joshua)

Volunteers also saw training as providing them with knowledge they may not have
chance to gain doing their role, due to the limited time they spend in it, as Brett
outlined: ‘if you’re only doing it one day a week you can’t get that knowledge base, and
the [staff] expect you to have that knowledge base to carry out the role’.

Therefore, the dynamic object of HIV motivated volunteers in their learning within the
practices of training. These practices also provided volunteers with an understanding of
the sociocultural history behind the scientific concept of HIV, which was integral to the
volunteering activity. The next section continues this focus on the object by examining the values embedded within it, which become a rule in the volunteering activity and a regulating aspect of training practices.

**8.4.5.2 Values embedded in the object: ‘in this environment that isn’t the right opinion’**

In this case, the values of the charity related to the object of people living with HIV and the stance the charity takes towards supporting them. These values have developed within the culture and history of the charity and were embedded in both the knowledge created and distributed within the practices of training and the shared object of volunteering. These values appeared as both an implicit and explicit tool that mediated the practices of training. For example, in the HIV basics training I observed, one exercise involved volunteers being given the values of the charity on printed A4 sheets of paper to hold up and discuss. Therefore, the values of the charity were embedded in and central to the object and also to the activity of volunteering and practices of training.

The value volunteers placed on the object also motivated their learning. For example, Kayla described the training as helping her to ensure she treated service users ‘correctly’:

> I guess it is knowledge – words to use and other people’s situations and understanding of that side of things to make you feel more confident that you can just be with that person and not feel like, oh my God what are they going to say to me! (Kayla)

Michael also described how knowledge in training was imbued with the values of the organisation. One particular example volunteers gave was the ‘vocabulary’ and ‘terminology’ shared in training:

> [U]nderstanding terminology sensitivity to HIV as I guess a liveable condition and I think as well the terminology was quite prominent to where CS3 stands with it and not using certain terms of like being a victim. (Michael)

The values imbued in the object, which motivated the learning of volunteers, could be described as the activist pursuits of subjects. Vianna and Stetsenko (2011) claim that
when knowledge is directed at these activist pursuits, learning is made meaningful. For example, Jacqueline explained her reasons for starting as a volunteer at the charity at a time when HIV was ‘so [emphasised] stigmatised’ and patients were kept in isolation in hospitals: ‘It was horrendous and I just thought - this is got to be wrong and I want to do something about it’.

Training practices involved addressing this kind of stigma, and it was through these practices that volunteers became more confident that when faced with a ‘prejudicial statement’ (Jacqueline) within and beyond their volunteering activity they could ‘try to put them right’ (Kayla) in ‘an informative and educative kind of way, rather than don’t be stupid!’ (Jacqueline). More widely, distributing and exchanging knowledge from the charity was integral to the activity of volunteering. Alex emphasised the importance of volunteers having an ‘accurate understanding’ of the object: ‘we don’t want people to go out volunteering with us into the community and sharing inaccurate information about HIV.’ However, while the dialogic practices within training helped to construct and consolidate knowledge and values around the object, they also posed a challenge to the monitoring and assessment of volunteers:

I guess as well you only know what people share with you. So sometimes in a group, people can hide within the group and not be very vocal. And then you don’t really know what they think. (Alex)

Volunteers bring their historicity into training, which includes different experiences of and attitudes towards the object of HIV and takes the form of multiple voices within the system, which were discussed in the previous section. Shared values were developed through the re-orchestration of these multiple voices (Engeström, 2008), which Kayla described as being: ‘Kind of a little nudge, back to being aligned’. This re-orchestration is regulated by the values of the charity. For example, Joshua outlined the different perspectives volunteers of different generations may have on HIV and how both perspectives can be useful learning tools. However, he emphasised the importance of the ‘visions and values’ of CS3 in regulating these perspectives:
Both approaches are actually really useful for different people, but there is a level in the training where we actually just put down the line – this is what we expect. And it’s essential that people share those approaches and learn from each other – the 20 year from the 61 year old and vice versa, but also down the middle is CS3 saying these are our visions and values, these are what our policies are, and this will not be breached. (Joshua)

However, a re-orchestration of voices was not always possible. For example, Kayla recalled an incident in her induction training session, where one of the volunteers within the group expressed views that opposed the values of CS3:

This one guy, some of his views were like – he said something like, if someone contracts HIV through a blood transfusion that’s understandable and we should help them, but if someone gets it, like gay men, through sex then that’s their fault. And it was just like, what? What are you doing in this room! (Kayla)

From his views this volunteer is immediately positioned as not sharing the collective values of the system or, as Kayla described it, ‘the vision of CS3’. Kayla describes the trainer as ‘correcting’ this view and emphasised the importance of this correction within the environment of the charity:

[Alex] obviously did correct him and said no that isn’t right. Not even - that’s your opinion and we’ll go with it, but it was actually no in this environment that isn’t the right opinion because you’ve got to hear that isn’t right, you know. It’s different to just someone expressing an opinion in a conversation where you go - fair enough, your opinion we’ll let that go, you know. But because of the nature of in training she had to make sure that it was definitely seen as it wasn’t the right thing to say. (Kayla)

In this instance, where a subject was positioned outside the values of the charity, this proved to be destructive to the system and led to that subject leaving the activity, as Alex described:

I was very concerned and basically decided that [short pause] we couldn’t offer them a volunteering opportunity because of the attitudes they had demonstrated within the training. And even when they were offered information to change that attitude they still were persisting with the same attitude. And also because they seemed to have no insight into that. So when I spoke to them it wasn’t like they said – oh yeah, I can kind of see how that would come across as being prejudiced to people. They didn’t have any insight either. So I had to say to them not to come back to the next day of training. (Alex)

Therefore, shared values enable the development of a shared object, and thus the collective activity of volunteering working towards this object. Multiple voices and perspectives are used as tools within training practices to mediate learning, but these tools are also regulated by the values of the system. Volunteers come in to the training
with their own perspectives, based on their experiences and knowledge, which then need to be regulated through the values of the charity. Even episodic volunteers involved in the charity on a one-off basis received a briefing that included the ‘key messages’ (Alex) of the charity.

Overall, knowledge and practices of the volunteering activity are regulated by the rules of the system, which are directed towards its values. These values can provide opportunities for expansion, but also destruction, of the activity. The next section looks at these values from the unique position volunteers hold within the charity.

8.4.5.3 Unique position of volunteers: ‘They can also say things that, as staff, we’re not technically able to say’

Volunteers hold a unique position within the charity, which can both constrain and afford their ability to work on the object of HIV. In terms of affordance, the charity is transformed to include volunteers as an integral part of the division of labour. This was reflected in Alex’s description of her role as creating ‘opportunities for people to volunteer with us’ and ‘looking at different areas where we could involve volunteers or increase volunteer involvement’. Through this transformation of the charity volunteers also had the potential to be transformed as they work towards the object, as Alex went on to describe:

I think we’d really struggle if we didn’t involve volunteers, but we also know that people benefit a lot from volunteering with us. So we know that people gain skills, they gain confidence, and also for people living with HIV themselves it can be a way that people feel they can give back to the organisation, but also that their relationship with their own HIV diagnosis can change in the course of their volunteering. (Alex)

The quote from Alex refers to the multiple positions volunteers were able to hold within the system: as service users, volunteers and also, like Jacqueline, trainers. Training was viewed as an opportunity for volunteers to assess their own position, and the position of others, within the charity. Michael explained that participating in training ‘really steers you as to how invested you are within that role and whether that role’s
right for you’. Therefore, training became a tool that helped volunteers to position themselves within the system of the charity. Training was also a practice that could highlight to volunteers the boundaries of their position within the volunteering activity. In the focus group, Alaia described these boundaries as ‘her limits’ as a volunteer, which became apparent to her through a role-play exercise in a training session for her volunteer role representing service users:

Alaia: [S]o in that moment I realised - oh it's not that [sic] easy as I thought! Like, I should be more careful with that. That was my main challenge. Because on another moment they were saying that you have to protect yourself with other users, you cannot like - yeah I’m here for everything you need. So I was saying, why not? You have to be there for everything they need. And then one said, ok let me make this point - oh sorry do you know what happened to me? I have been raped yesterday, what do you think I should do? Like you are not trained - you are not a psychologist, you are not a psychiatrist. So you have to know where you are.

Jacqueline: When to ask for help
Alaia: Yes you cannot do it, you cannot do everything.
Me: A reminder of what could happen in the role?
Alaia: Yes of your limits. So that was a challenge.

Volunteers were able to position themselves within the charity, and Kayla expressed this agency through the value she placed on the shared object of service users. Kayla described the training as helping her to ensure she treated service users ‘correctly’ and in an area of her volunteering that she felt this need was not being met, a contradiction appeared to emerge between the desire of Kayla to work on the object and a perceived lack of support to enable her to achieve it. In attempting to resolve this contradiction, Kayla demonstrated what Haapasaaria et al. (2016) describe as transformative agency, as she searched for new possibilities and became an ‘agent’ of her own learning:

[What I will make sure [smiles] happens is that I then sit down with [volunteer coordinator] just the two of us and talk through a lot lot more detail and obviously I would like that to happen and I think it will happen if it comes from me making sure it happens more. So just to make sure I’m comfortable in that role but also that I’m actually doing what the service user needs me for as well to be honest. So that’s the training I would like to see and I’ll be making sure that does happen when that becomes a more active role. (Kayla)

In this example, the object of the volunteering activity, people living with HIV, and how Kayla ‘subjects’ herself towards this object, is motivating her to learn:
I don’t feel like I am getting quite the support at the moment. So I think, maybe, if nothing comes back then it might be something I have to do. Only purely because I am thinking about the service user and not wanting to mess it up really. If you’re really going to engage with somebody who clearly has a need for one to one support you need to do that right. (Kayla)

Through their different position from staff in the activity, volunteers were able to offer a different perspective that became a useful tool in training. Joshua, a trainer for peer mentor volunteers within the charity, described the unique perspective that volunteers bring to training:

[It’s alright me speaking for people, but I actually don’t think there’s much authority in that, cos [sic] people might not trust it. I cannot talk as a peer mentor because I’m not one, but peer mentors can and they can answer those questions. They can also say things that as staff we’re not technically able to say, whether that’s about organisational processes or things like that. We say, as staff, these are the policies and we follow these policies and end of. Whereas volunteers can maybe say, that’s more obstructive or I found this more helpful or an easier way I found is –. (Joshua)

Here, Joshua is referring to the freedom volunteers have in their position regarding certain rules of the system and how this subjectivity allows them to contribute to the activity in a different way to paid staff. However, contradictions may also arise from these different positions. Such a contradiction was highlighted by Brett who described a ‘fine line’ between his volunteer role and the staff role. When asked to do certain tasks, Brett and his fellow volunteers ‘had to turn around and say we don’t want to do that because we don’t think that’s within our remit of volunteering’. Brett went on to describe how volunteers enacted this sense of collective agency through having the ‘same dialogue’, which they drew upon to protect their position in the system. Therefore, when volunteers such as Kayla and Brett experienced contradictions within the division of labour they were able to enact agency and transform the system of the charity.

As well as an agentic tool, training was also valued as a tool that brings subjects together and ‘helps with the community feeling of the charity’ in a way that might not happen within their volunteering activity where, depending on their role, volunteers ‘can feel a bit isolated’ (Jacqueline). The sense of belonging created through the practices of training also extend beyond the volunteering activity as Kayla described how being a
volunteer at CS3 had made her feel ‘part of something a little bit bigger’ and ‘part of something here that has quite a big presence in [the city]’. This section has discussed the unique position of the volunteer role and how volunteers are subjected to the object of volunteering activity and also to the specific practices of training. The next section goes on to explore how, from these unique positions, volunteers are able to transform both themselves and their environment.

8.4.5.4 Individual and social transformation: ‘you can explain it to someone who doesn’t know about it’

Vianna and Stetsenko (2011) argue that it is though collaborative processes that people transform their environment, their lives and themselves. This could apply to the collaborative practices of training in this case, as subjects worked towards individual pursuits and a shared object, and were motivated in the activity to transform themselves and also the system of the charity. Michael spoke about how the volunteer role descriptions provided by the charity enabled volunteers to match their individual goals to the wider object of the charity:

I think that’s really important in terms of having volunteers – there’s a reason why people want to volunteer and one reason is because they want to help an organisation out. But another reason is you want to feel you come away from it either expanding on your existing knowledge or skill set or that you start to enter something that you want to go into in the future. (Michael)

Michael went on to describe that, even though the training he had participated in had been mandatory, he had been motivated to participate through his individual motivations and the collective object of the charity:

I think it’s coming from going in the training and understanding the culture and understanding - also the people that work there and knowing that they are invested within your training - and within like a shared vision of supporting those living with HIV. That I think probably furthers me to want to do other roles within there and therefore attend that training to achieve those targets. (Michael)

The meeting of Michael’s individual goals and the collective object of activity had expanded the possibilities for both Michael and the charity:

I have attended mandatory training, but I guess I only set out to do one initial
role and that's spawned into three roles. Going through that initial training of understanding where HIV is in terms of discrimination and perception and where CS3 comes into it in terms of hoping to quash that or amend that relationship with those that feel discriminated. (Michael)

Michael was able to contribute what he had learned within training to other voluntary organisations and ultimately got a paid position working in the voluntary sector. He claimed that this change would not have ‘been possible without the skills that CS3 provided me with’. Brett also described how the practices of training had given him ‘a new skill set’ and ‘the key basic skills’ to help him move into a different career.

For Brett and Michael practices of training had provided space for volunteers to ‘formulate individual agendas’ while also merging them with the collective goals of the charity (Vianna et al., 2014, p.77). However, there is the potential that individual agendas and collective goals may diverge. Michael emphasised the importance of volunteers sharing a collective object, rather than someone who ‘just wants to do it just to put it on their CV and to have a reference’.

Michael spoke about how he felt valued by the organisation through their trust in his work on the shared object and how this had opened up new possibilities for him:

I think in terms of, in general in terms of confidence, I think if someone trusts in you to have that interaction with someone who’s vulnerable, to be an advocate of a charity. I think in terms of trusting you to do things by yourself as well. (Michael)

Therefore, learning in this environment became personally transformative by opening up new possibilities for personal and social growth (Vianna and Stetsenko, 2011). In some instances these possibilities involved a conflict with previous experiences, as Alaia described when she explained how she had drawn upon her background of arts in a training exercise, which led to it becoming ‘a complete disaster’:

[I]t made me realise that it’s not always that easy and you always have to think before - that it’s not like everything in this world you can use some skills for other. That you have to know where you are. (Alaia)

Brett described a sense of personal transformation from engaging in training practices and the volunteering activity:

I think I listen to people differently and interact with what they say differently. I think I’m slightly more empathetic to what they say, rather than being
dismissive. I’m more inclined to listen to people in more detail than I was before. (Brett)

Training practices had also increased the confidence of Brett to perform his volunteer role, which had enabled a transformation of his wider environment through his activity of ‘imparting information’:

I did the candlelight vigil, selling candles and ribbons, last year and this young guy came up and asked what it was for. He was 19 and didn’t have any knowledge of HIV or what a candlelight vigil was for, which I thought was, not disturbing, but I thought how can you not have known any information about this before? So yeah, I was able to explain the reason why. (Brett)

Alaia also described how, through participating in training, she felt ‘more confident’ in talking to people about HIV: ‘not just people from the organisation or people that use the service of the organisation, but also with all sorts of people.’ Therefore, volunteers were able to distribute and exchange knowledge, including the values within it, within and beyond their volunteer roles.

Even the volunteering activity itself could enable discourse around the object to be distributed more widely, as Alejandro explained:

[P]eople were asking, what are you doing this weekend? Well I’m volunteering. And they say, where are you volunteering? And you have to explain and it’s - oh really what’s that? [laughs] […] But yeah some people don’t know what HIV is, so. (Alejandro)

Kayla also spoke about how continuing the dialogue started in training outside the charity had brought the object of HIV to other people’s attention:

I think it’s about even just saying the word – CS3. What is CS3? Well it supports people living with HIV. And just to say it in quite a normal way, I keep saying the word normal, but you know, just - yeah that’s what it is. Not in a - you’ve got HIV oh my God! You know, we used to go like ‘AIDS’ [mouths silently]. You know, like whisper it! That type of thing you know [laughs]. Good God! Just say in a normal level as you would anything else in conversation helps I think. (Kayla)

Bringing the object and its discourse into her activities beyond the charity, transformed both Kayla and her environment:

As I say, I don’t purposefully want to challenge people’s opinion but it’s just to say it normally. I like to think it is something that maybe not everyone would say normally. Cos some people might say oh right! You just said HIV to me, oh right! [does impression] You could tell they were just trying to process things a little bit maybe. I haven’t done a whole big rant and scream at someone, but I do just feel that – just using the terminology in everyday life and using the right terminology I think is a little step in just encouraging people’s vocabulary in the
correct way. Which I like to think is – it’s not a big full on challenge, but let’s use the terminology in the correct way and just say it! (Kayla)

Therefore, volunteers felt able to address the cause of the charity through their participation in training, becoming ‘learners as activists’ (Vianna et al., 2014, p.77). As volunteers gained knowledge from the practices of training and activity of volunteering, they were transformed in how they felt able to act on the object:

[Y]ou don’t educate people but you know if someone does say something that’s not quite right you have a tiny – and I would say it’s tiny [laughs] bit of knowledge just to feel like, you know, can try to put them right. (Kayla)

The confidence that Kayla and other volunteers described had the potential for wider social transformation. Brett encapsulated the transformative potential of the knowledge referred to by Kayla by describing it as a life or death situation when explaining HIV treatment to service users:

It’s about somebody giving the wrong information to somebody. In a way it can put somebody’s life in danger because if they’re not going to access medication that’s when the immune system stops and you become very ill and you can die. (Brett)

Knowledge constituted by and constructed within training challenged what volunteers thought they knew about the object, as Alaia described, ‘you think you know everything about HIV, but then you realise that there are so many things that you don’t know’.

Participating in training had also led Michael to realise that his knowledge on HIV was ‘limited and I probably thought it was more comprehensive than it was. So the training was really good for that’. A sense of freedom towards learning was also echoed by the trainers, as my notes from the HIV update training demonstrate:

Alex also said not to worry if you don’t know the answers and it’s fine to make mistakes – that’s how we learn. She said she didn’t want volunteers to feel under pressure to know everything and this was their opportunity to ask questions. (Observation 2, CS3)

In this case, knowledge could be described as a mediating tool in the becoming of volunteers, in the ongoing developmental process described by Stetsenko (2014). The trust and legitimacy volunteers placed on the knowledge available through training also strengthened this knowledge as a mediating tool. Volunteers may know about the object when they enter the activity, but it was through the practices of training that this
knowledge was made meaningful and had an *activist purpose* (Vianna and Stetsenko, 2011).

Some volunteers in the study found it difficult to express how the training they had participated in had been applied to their everyday life. In other words, how the transformational process of subjects working on the object within the system could be distributed more widely. For example, Jacqueline, who had been volunteering for over 25 years, said: ‘I’ve been doing it so long everything sort of blends and merges you know. What I’ve done here has helped outside and vice versa’. Alejandro also said that the training for certain roles and events he had volunteered at was very specific and therefore was not applicable beyond his volunteering activity. However, he saw the knowledge that related directly to the object of HIV as a ‘transformative tool’ (Vianna and Stetsenko, 2011) to enact wider transformative change outside of the charity:

> [T]he training has been useful I think to explain what the charity is for, what the stigmas are. Kind of like provides you with the vocabulary of what to say to people who doesn’t [sic] know anything about HIV obviously. So I would say yeah how to inform, how to give information out about the charity, HIV, so that helps definitely. Yeah because sometimes you know about it, but you don’t know how to explain it - how to put it into a situation that you can explain it to someone who doesn’t know about it. (Alejandro)

Although the formal training sessions I observed included many PowerPoint presentations, trainers placed a strong emphasis on discussion that encouraged volunteers ‘to share their opinions and discuss issues’ (Alex). Knowledge was created through this relational, dialogic process and became a transformative tool that drove the activity of volunteering towards the object of HIV. Knowledge can therefore be described as a transformative tool in the dialectical sense: it enables volunteers to enact change, but is also continuously changing itself through its interaction with and use in the environment, as Michael explained:

> I think the training can only prepare you so much until you have someone stating where they are financially in a way that has an effect on their welfare. I think in terms of knowing that someone is destitute, for example, that they have no income whatsoever. The time that I’d started that [volunteer role] was when the weather was getting worse, it was getting colder and, you know, those electricity bills go up, for example. I think sometimes it’s relevant within the moment when you have that conversation with someone and how that changes.
I think in terms of the training itself there was enough role-play and enough various scenarios that you understood the impact on the service user. (Michael)

Enacting knowledge distributed in training is therefore a key part of the volunteering activity and provides opportunities for both individual and social transformation.

8.4.6 Summary

This case highlighted the dynamism and complexity of the object of activity, which was imbued with values that had been culturally and historically developed within the system of the charity. This dynamism required a process of ongoing learning for volunteers. Values of the charity became a tool in the volunteering activity and volunteers placed great importance on using the ‘correct terminology and vocabulary’ and expressing the ‘right opinion’. Scientific knowledge related to the object, such as viral load and CD4 count, made available to volunteers through training practices helped to mediate understanding of the everyday experiences of people using the charity’s services.

An integral part of the regulation of the volunteering activity, including the practices of training, was the re-orchestration of the multiple voices within the system. Contradictions emerged within this process of re-orchestration, which could lead to a transformation of volunteers’ perspective of the object and of the system as they became more involved in the volunteering activity. Contradiction could also lead to destruction if the views of volunteers could not be re-orchestrated, which would result in them having to leave the activity. Contradictions were also identified within the division of labour where the unique position of volunteers could both constrain and afford their ability to work on the object of HIV. Both Kayla and Brett described how they had been able to enact transformative agency to address these contradictions.

Therefore, training opened up new possibilities for volunteers, which was potentially transformative for themselves and their individual pursuits, the system and their wider environment as they exchanged knowledge beyond their volunteering activity. Training
was also a tool that helped volunteers position themselves within the system of the charity and highlighted the boundaries of their position within the volunteering activity. Volunteers felt able to address the cause of the charity through their participation in training, becoming \textit{learners as activists} (Vianna \textit{et al.}, 2014) and enacting wider social transformation.

9. Synthesis of cases

9.1 Introduction
Chapter 8 presented the findings from each case, highlighting particular themes and an understanding of the ‘local dynamics’ within each case (Miles and Huberman, 1994, p.205). This chapter provides a synthesis of the individual case findings, which aims to provide a narration of shared themes across the cases, thus deepening understanding and explanation (\textit{ibid.}). This process involves distinguishing between aspects exclusive to specific cases, and information that is relevant to them all to ensure the usefulness of the findings beyond the cases (Ayre \textit{et al.}, 2003) and increase the relevance or applicability of findings to similar settings (Miles and Huberman, 1994).

This chapter will begin by discussing the three cross-case themes of dynamic object, subjectivity and transformation. Each theme is discussed in detail and is organised into sub-sections. The chapter will go on to distinguish and examine the nuances between each case in order to illuminate the theoretical framework and show different aspects of the same cross-cutting phenomenon of learning as a process of transformation.

9.2 Common themes across all cases

9.2.1 Dynamic object of activity
Across all cases the object of the volunteering activity was conceptualised as driving the collective activity forward, and included the activist and meaningful life pursuits of
individuals (Vianna and Stetsenko, 2011) and the internally contradictory unity of use and exchange value (Engeström, 2008). This section examines how the use value of knowledge relating to the object accessed through training practices was made meaningful to volunteers as it connected with their activist pursuits. It will also outline the multiple voices that constitute and contribute to formulating and instantiating these dynamic objects, which require volunteers to learn ‘what is not yet there’ (Engeström and Sannino, 2010, p.2).

9.2.1.1 Runaway objects

In section 8.1 the object of activity in all cases was conceptualised as the driving force of the collective activity of volunteering. As the motivating force of activity, the object was a prominent theme across all cases, often involving ‘life or death’ situations. For example, in CS1 Noel talked about sharing his knowledge of stroke with a friend to identify certain changes he could make ‘otherwise his life would be at risk’, and Greg explained how he had been able to identify that his wife was experiencing a TIA from the training he had completed. Brett in CS3 also talked about the importance of volunteers being able to provide the right information on HIV to service users to avoid putting their ‘life in danger’.

The objects of the volunteering activity could be described as ‘runaway objects’, which have a global scale of influence and can threaten safety and security (Engeström, 2008). The temporal aspect, or the theme of past, present and future (Cole, 1996), is important as within all cases the object was developing and transforming over time. The ‘sociocultural practices “hidden behind” concepts’ was an essential part of the practices of training in each case, which provided ‘access to the history of these practices and their conceptual tools in their practical relevance’ (Vianna and Stetsenko, 2011, p.319-20). However, my study showed that the importance of history and
sociocultural practices also applied to the rules regulating the activity in each case, which concerned the values of the charity and its stance towards the object.

The object was continuously changing due to being acted on within and outside the system and thus required the ongoing learning of volunteers. Engeström (2008, p.227) describes runaway objects as ‘poorly under anybody’s control’ and having ‘far-reaching, unexpected side effects’. This dynamic aspect of the object was reflected across all cases, which volunteers described as ‘the gap’ between training and their volunteering activity. Sophia described the volunteering activity as ‘life and it’s spontaneous and it’s random’, so volunteers felt they were ‘learning and training all the time’ (Greg, CS1) as ‘things are changing so fast’ (Brett, CS3).

### 9.2.1.2 Motivation to learn

Engeström (1994) claims that subjects are motivated to learn when they perceive the use value of the subject matter in mastering, understanding, developing and transforming the practices they are engaged in. The motivation of volunteers to act on the object of their activity was expressed through emotion, connecting to personal experiences and beliefs. In CS1 volunteers who had directly been affected by stroke, like Greg, expressed their desire ‘to help people’ in similar situations. In CS3, Jacqueline talked about the ‘horrendous’ treatment of then AIDS patients in the 1990s and her desire ‘to do something about it’. Rebekah in CS2 spoke about how the ‘depressing’ and ‘frustrating’ training session on rape and the law had made her even more motivated to act on the object of sexual violence. Across the cases, it was clear that without an emotional connection to the object of the volunteering activity volunteers were limited in their ability to act on it, no matter how many ‘thousands of hours of lectures’ (David, CS1) they experienced.

Therefore, through the practices of training, volunteers were able to channel their passion, resistance or personal experience into collective activity working towards the
object in each case. The motivation of subjects to engage in training practices enabled them to go further than simply sharing a history of the object, as they were able to purposely mediate this history to direct their activity at the object. Volunteers in CS1 and CS2 also talked about the emotions of the paid staff within the system as being a driving force for their own activity. For example, David spoke about the ‘passion’ of everyone in CS1 and Joni spoke about the ‘compassionate’ nature of the trainer in CS2. The position of these volunteers is unique in the way that, unlike staff, they are not being paid for their activity, so it is their personal desires, goals and shared motive that motivate them in the volunteering activity.

The object is described as being both material and ideal (Foot, 2002), including the ‘raw material’ (Engeström, 1999b) and the imagined outcome of the activity. For example, in CS1 the raw material was explained as being the health condition of stroke, which is something to be worked upon or ‘realised’ (Nardi, 2005). The imagined outcome of the activity was explained as a motive to make the world better through improved conditions for stroke survivors and fewer strokes (adapted from Nardi, 2005, p.40). Taking into account the dual meaning of the term object was useful in examining how the imagined outcome, or driver of social change (Stetsenko, 2014), contributed to the motivation of subjects to develop the object and at the same time themselves. As volunteers imagined acting on the object, this also created contradictions within the activity across the cases. For example, subjects in CS2 felt ‘terrified’ in advance of the activity, but they still remained motivated to act on it and learn about it. Training was a practice that enabled volunteers to imagine acting on the object and volunteers described training as ‘unpressurised’, ‘relaxed’ (Noel, CS1), a ‘safe space’, (Sophia, CS2) a place ‘to practice’ (Terry, CS2) before subjects got ‘let loose’ (Kayla, CS3) within their activity. Imagination and emotion were therefore powerful tools for learning within this context.
9.2.1.3 **Scientific and everyday concepts**

Scientific knowledge, or scientific concepts (Vygotsky, 1987), relating to the object was highly valued by volunteers across the cases and this knowledge was made available through training practices. For example, the blood pressure training in CS1 included knowledge about what blood pressure is, what a ‘normal’ systolic blood pressure should be and atrial fibrillation. Volunteers felt that this type of knowledge could not be ‘picked up as you go along’ (David, CS1), that it would be ‘terrible’ if volunteers went into their activities without any training (Joni, CS2), that without training volunteers would be ‘talking a load of gibberish’ (Greg, CS1) and that this knowledge was necessary for ‘everyday interactions with service users’ (Michael, CS3).

Therefore as Rowlands (2000) argues, such scientific knowledge has to be developed from ‘above’ by the charities and taught through instruction; it could not just come from ‘below’ through everyday experiences of volunteers. For example, in CS1, stroke survivors talked about how participating in training had led them to realise how little they knew from their own experience of stroke and how ‘no two strokes are the same’ (David, CS1). Similarly, in CS3, Joshua described a volunteer who had been living with HIV for 32 years but had ‘no idea’ about key scientific concepts such as CD4 count and viral load. It was through the volunteering activity and practices of training that scientific knowledge was made meaningful to volunteers as it was enacted with service users and combined with their own everyday experience. This follows the concept of development by Vygotsky (1987, p.153) who described the complex relationship of scientific concepts growing downwards ‘through the everyday concept’ and ‘into the domain of personal experience’, and everyday concepts moving ‘upward through the scientific’.

Volunteers placed much value on the knowledge available within the charity, prioritising it above knowledge that they could access outside this system. As Jacqueline said about having access to HIV information from CS3: ‘you know the information you’ll get from here is sound it’s not going to be biased, it won’t be wrong.’ Training was the main
practice through which volunteers could access such knowledge and all the volunteers in this study engaged in training voluntarily. Therefore, in this environment, scientific concepts were not ‘possessed by individuals’ but were part of the cultural resources of the charity (Wells, 2008, p.329). However, whilst access to these resources through training provided motivation for volunteers within the system, it could also restrict their motivation for independent learning outside the system, as was seen in CS2.

Although most volunteers across the cases had some knowledge about the object when they entered the activity, it was through the practices of training that this knowledge was made meaningful, as through these practices it gained an activist purpose (Vianna and Stetsenko, 2011). In other words, this knowledge was directed at the shared object of activity in each case. As in the study by Maclaren (2015) this did not create completely new ‘insights’ or ‘truths’, but the dialogic practices within training helped to create deeper insights into what the volunteers were already aware of and encouraged further questioning. Volunteers in the CS2 focus group discussed how knowledge accessed through training had challenged them to accept the ‘numbers and the facts and the percentages’ relating to sexual violence of which they were already aware. Volunteers in CS1 drew on their own and each other’s personal experiences to ‘spread the word’ of stroke more widely. Volunteers in CS3 felt able to use the ‘correct terminology’ and ‘vocabulary’ to challenge stigmatising or ill-informed views of people living with HIV. In particular, knowledge became meaningful to volunteers when it was combined with the perspectives of subjects within the system, specifically service users. The knowledge volunteers learned in training was then distributed by them beyond the system of the charity, thus making knowledge a transformative tool to further work on the object (Vianna and Stetsenko, 2011).
9.2.1.4 Values of the object

Values relating to the object in each case appeared as both implicit and explicit rules within the volunteering activity and practices of training. Explicitly, the initial volunteer application form checked for shared values to ensure that volunteers were ‘up for working in the way that we do’ (Klara, CS2). Additionally, volunteers were monitored through the dialogic practices of training to ensure they were demonstrating these values. More implicitly, shared values were an assumption for most volunteers who viewed the other subjects within the system as being 'in the same boat' (Greg, CS1), as understanding ‘the vision’ of the charity and their views falling ‘within that’ (Kayla, CS3) and more generally that ‘everyone is going to be nice who volunteers there aren’t they?’ (Joni, CS2).

Values did not just ‘appear’, rather they were socially and historically developed through practices within the charity and volunteering activities, as well as from external activity systems. For example, in CS3, subjects recognised the damaging effect of stigma for people living with HIV from the 1980s as Jacqueline described, which continues to be ‘one of the biggest issues within HIV’ (Brett, CS3) and ‘the history of HIV as well is to fight the stigma of HIV’ (Michael, CS3). The importance of addressing this stigma was reflected by the importance placed on the ‘right terminology’ and the ‘correct vocabulary’ (Kayla, CS3), which were tools shared within training that volunteers used within their volunteering activity.

Values relating to the object were not fixed, but continuously developed through processes of dialogue and negotiation in the practices of training. Trainers across all cases placed much importance on the ‘challenging’ of values and beliefs expressed by volunteers that were not shared by the system of the charity. For example, Klara in CS2 spoke about ‘unacceptable ideas’, such as blaming the survivor of an attack. Alex in CS3 described the dialogic practices within training as bringing attitudes ‘out into the open’ to be discussed and challenged. Volunteers themselves also participated in such challenging and Kayla in CS3 spoke about ‘wrong opinions’, such as the view that gay
men who were HIV positive were undeserving of support. Therefore, values were also employed as a regulating aspect of the activity system, which is shown through the initial application form volunteers had to complete before beginning their volunteering activity in each case.

Therefore, shared values within the system of volunteering activity were an important motivating force that drove the activity forward. Training provided a space for this sharing of values and, as Klara described in CS2, a shared understanding. This sharing of values, understanding and experience among volunteers engaged in collaborative activity, helped to create intersubjectivity or the ‘shared meanings of culture’ (O’Donnell and Tharp 2012, p.23). Sufficient intersubjectivity is needed to coordinate working on the object (Williams et al., 2007) and enables shared meanings to develop from shared activities (O’Donnell and Tharp, 2012). Across the cases, training practices enabled shared meanings of the object to be developed through a ‘shared experience’ (Klara, CS2), creating a ‘bonded group’ (Noel, CS1) and the opportunity for volunteers to ‘share their experiences’ of the object with each other (Alex, CS3). This was particularly important in CS2 where experiencing the training with each other was viewed as being integral to learning how to support each other within the volunteering activity, thus further developing intersubjectivity.

Therefore, values not only regulate the system, but they also motivate subjects to work on the object through shared activity. Formulating the object is a dialogic process (Foot, 2002) and it is also through this dialogue that trainers enact the rules of the system to protect the values of the object. Thus, as Edwards (2010) describes, institutionally held knowledge and values, which are embedded in practices, are mediated through the training of volunteers. Therefore, the complex and dynamic objects being worked on in each case include more than the practical action of the charity (Engeström, R., 1995).
9.2.1.5  Multiple voices and dialogue

Training across all cases allowed for interaction and a sharing of perspectives, and the dialogic practices within training played an integral role in the formulation and instantiation of the object. Volunteers, particularly in CS2, said it was only through training that they had engaged in discourses around the object. As Rebekah said in CS2 about sexual violence: ‘you just don’t talk about it in day-to-day life normally’. Therefore, the system of the charity was a unique place where volunteers could discuss these complex objects and, through doing so, develop and act on them. Learning about these objects had an ‘activist’ purpose in the charity environment.

The object of volunteering in each case was constituted by the multiple perspectives of volunteers, service users and staff, which came out of interaction with these subjects (Engeström, R., 1995). For example, across the cases, exercises like role-plays and scenarios deliberately brought multiple voices into the system, which became mediating tools for volunteers to formulate and act on the object of activity. A particularly important voice in each case was that of the service user. In the CS1 focus group, David emphasised the importance of hearing the perspectives of stroke survivors and their carers to increase his understanding of the object. In CS3, Kayla said that the diverse range of volunteers within her training group brought a range of different perspectives and understandings of people living with HIV, medical information and myths. Regarding the object of sexual violence in CS2, Stephanie described spending ‘a few weeks in a room full of people, some experts, and it just widens you completely’. Therefore, subjects within the system both formulated and instantiated the object of activity, which can be described as a process of learning (Nardi, 2005). This process helps to explain how the subject changes with the object in the activity and thus the potential for learning and development in the charity environment, which will be examined further in section 9.2.3.

Across the cases rules were also enacted through dialogic practices within training. Trainers described how they ‘watched’ (Klara, CS2) and ‘kept an eye on’ (Gillian, CS1)
the behaviour of volunteers within training, ‘listened’ to their discussions (Nadja, CS2) and observed how volunteers ‘interact with others’ (Alex, CS3) and ‘engage with people’ (Joshua, CS3). Rules aimed to protect the values constituting the object, and contradictions emerged across all cases when these values were challenged. Such a contradiction was described by Alex and Kayla in CS3 when they described the removal of a subject from the activity of volunteering because they did not share the values of the charity. In this case, the re-orchestration of the multiple voices within the system according to its rules and values also became an object of the volunteering activity. This particular incident could also be an example of rules becoming visible as a tool within the system when, as a tool, it runs into conflict, or fails to work (Roth and Lee, 2007).

9.2.1.6 Summary

In summary, all cases were working towards dynamic and complex ‘runaway’ objects that were not fixed, but were jointly formulated. These objects were also regulated by the values of the system, which had been socially and historically developed. Multiple voices, individual motivations and emotions, as well as the historical sociocultural practices involved in the system, have a major role in developing the object and help to explain its complexity in the particular activity of volunteering.

Training across the cases was a practice that provided access to scientific concepts that, along with everyday experiences, made knowledge about the object meaningful to volunteers and gain an activist purpose. Multiple voices and opportunities for dialogue within training also further developed the object and created the intersubjectivity needed to work on the object in activity. The next section will follow on from this concept of intersubjectivity and examine how volunteers were subjected to the activity through their position within the system, and their stance towards the object.
9.2.2 Subjectivity: Position of volunteers towards the object of activity

Across the cases, training practices enabled volunteers to make a unique contribution to the volunteering activity as social subjects (Stetsenko, 2012) through their own historicity and stance towards the object (Vianna et al., 2014). This section will explain how through their position within the charity, volunteers were subjected to the object and were able to work towards it through intersubjectivity. Training is discussed as an agentic tool, which also allows volunteers to position themselves within the system of the charity.

9.2.2.1 Stance towards the object

The theme of subjectivity explains the specific position of volunteers within the activity system of each charity and concerns ‘the particular, possibly chosen, aspect that a subject presents in relation to the object of activity’ (Williams et al., 2007, p.3). Therefore, volunteers across the cases could be described as positioning themselves in relation to the volunteering activity according to the meaning it, and therefore the object, holds for them (ibid). This position is the stance that volunteers take towards the object, which reveals the unique participation of individual subjects and the potential impact they can have on the system (Vianna and Stetsenko, 2011).

Across the cases, it was the stance volunteers took towards the service users of the charity and the value they placed on their responsibility towards them that positioned them within the activity. All volunteers within the study were motivated to engage in training practices because these practices allowed them to work on this object. Across the cases training was viewed as a reward that would benefit volunteers and emphasised their value to the system, rather than something they had to endure to engage in the activity. Therefore, volunteers were motivated to act on the object through the stance they took towards it. As Stephanie described in CS2, the stance she took towards the service users of the charity drove her forward in participating in training practices: ‘I don’t want to engage in some voluntary work, and this is crucial...’
work for women, and do a poor job.' Kayla in CS3 also actively positioned herself to seek out additional support and training, because she was ‘thinking about the service user and not wanting to mess it up really.’ Jerry described training in CS1 as his ‘duty’ within his position as a volunteer.

The historicity of volunteers also contributed to their stance towards the object, and included their own unique experiences, beliefs and values. As Leontyev (1974, p.179) argues these experiences are not ‘dormant’ when a subject enters an activity, but they are ‘the subject of his relations and his actions’ in a dialectical process of becoming through collaborative activity. The historicity of individual volunteers also became mediating artefacts for the other volunteers. For example, in CS1 David described hearing the personal experiences of stroke survivors as ‘diamond learning’ and the diversity of the professional backgrounds of volunteers in CS2 were described by Terry as ‘resources’ for learning.

9.2.2.2 Agency over learning

Volunteers across the cases described a ‘freedom’ over their learning, which they did not feel in positions they held in other systems. For example, in CS1 Greg and Noel contrasted their position within the charity to school and work respectively and described how their volunteering activity had created new possibilities for learning. Greg described learning about poetry, an activity he would have got ‘battered’ for if he had talked about it at school, and Noel described his sense of freedom of not having to ‘know everything’, unlike when he worked as a manager.

Volunteers could be described as becoming agents of their own learning (Haapasaaria et al., 2016) and the responsibility for learning was viewed to lie upon the volunteer’s ‘shoulders’ (David, CS1). As Stetsenko (2012) and other CHAT scholars outline, this agency does not come from within individuals, but is embedded in and enacted through collaborative activity. Training offered the possibilities for such collective agency. For
example, as Williams et al., (2007) argue it is through discursive practices, that are available in training, that the agency of learners are invoked, and therefore opportunities for dialogue were central in the construction of subjectivity of volunteers. For example, through dialogic practices in training, CS2 volunteers demonstrated an awareness of what Vianna and Stetsenko (2011) describe as their *unique contribution* to the object of sexual violence.

However, as shown in CS1, the agency of volunteers over their learning could be restricted by their position in the system. David described access to training as ‘other people’s decisions whether you are invited to those courses and they are often by invitation as opposed to a personal choice’. The perceived ‘amateur’ position of volunteers in CS2 also impacted on the interaction of volunteers in dialogue within training practices and independent learning outside the system.

### 9.2.2.3 Division of labour in volunteering activity

Through the division of labour, volunteers across all cases were positioned as an integral part of the charity and this was a point that was emphasised in all of the training sessions I observed. In CS1 volunteers were described as the ‘lifeblood’ of the charity and that services that provide a ‘lifeline’ to people affected by stroke would not exist without them. Volunteers were so important to CS2 that the charity was described by Nadja as *being* the volunteers, and the CS3 website claims that volunteers have always been at the heart of the charity and that they play a vital role in delivering services. Training practices were a tool used by the charities to demonstrate the value they placed on volunteers and that they were ‘investing’ in volunteers (CS1), taking ‘what they do seriously’ (CS3) and part of ‘the care they take of people’ (CS2). In turn, through participating in training volunteers felt trusted by staff to carry out the volunteering activity and they expressed a sense of pride and feeling of being valued
by the charity, as well as the trust they felt towards the staff members who trained them.

Across the cases volunteers played an integral role in training, as experienced volunteers provided opportunities for shadowing and even became trainers in CS1 and CS3. Volunteers by the very nature of their role were positioned differently to staff within the system, and thus provided different perspectives, subjectivities and what Vianna and Stetsenko, (2011) describe as unique individual contributions to the activity. As Joshua described in CS3, this position afforded volunteers certain freedoms to ‘talk very openly and honestly about their experience’ in a way that staff are ‘not technically able to say’.

Training was also a tool that helped volunteers position themselves within the boundaries of the volunteering activity, or as Alaia described, the ‘limits’ of being a volunteer. When volunteers moved from training into a volunteer role they took up a new position in the system. Some volunteers were also able to take multiple positions within the system, as they moved from being a service user to a volunteer, such as Glenn, Keith and Greg in CS1, and from being a volunteer to being a trainer, such as Nadja in CS2 and Jacqueline in CS3. These multiple positions expanded the horizon of possibilities for subjects and also contributed to the transformation of the system, which will be discussed further in section 9.2.3.

### 9.2.2.4 Intersubjectivity: Shared meanings and understandings

As discussed in the previous section, the division of labour explains how subjects are positioned within an activity. Intersubjectivity describes how work is coordinated on the object (Williams et al., 2007) from these positions and explains how shared meanings are developed through shared activities (O’Donnell and Tharp, 2012). This concept is important in this study because the development of shared meanings and understandings was an integral part of training practices across all cases. In CS2 this
intention was given by Klara as one of the reasons that training took the form of group activities, rather than hand-outs to be read individually. Through the dialogic practices of training, shared meanings and understandings became rules that positioned volunteers within the activity. This could be seen in how Kayla positioned herself when another volunteer expressed stigmatising views during the CS3 training, as she said about him: ‘What are you doing in this room! […] What are you doing here?’ In contrast, Kayla positioned herself alongside volunteers who shared the values of the charity: ‘we’re not questioning why we’re here or who we’re here to service’.

However, intersubjectivity developed within training practices did not necessarily continue into the volunteer activity. Trainers and volunteers in CS2 described how the strong community built up through training could weaken when volunteers moved onto the helpline, and outside training practices Noel in CS1 described a feeling of not ‘belonging’. When contradictions emerge within an activity, intersubjectivity can break down and the system can either collapse or emerge in a new form (Williams et al., 2007) and this will be discussed further in section 9.2.3.

### 9.2.2.5 Summary

This section has outlined the integral and unique position of volunteers within the charities, how they are subjected to the object through the division of labour and their historicity, and how individual subjects with their unique stance can work together on the object through intersubjectivity. These different positions and multiple voices within the system become tools that mediate learning, and the position of volunteers in the system can both afford and constrain their agency to act on the object within the activity.

In summary, the concept of subjectivity helps to provide an insight into the unique individual contributions of volunteers to activity (Vianna et al., 2014). Considering the position of volunteers within the activity and their stance towards the object is useful in
ensuring that learning in this context is not viewed as an individual event, but is a relational process that is embedded within and contributes to the system of volunteering activity.

### 9.2.3 Transformation within and beyond the system

Learning across the cases was conceptualised as a process of transformation, through which individual volunteers, the charity and the wider environment could be transformed. Particularly relevant to the context of the case studies is the process of transformation as a form of ‘becoming human’ as theorised in TAS (Vianna and Stetsenko, 2011). This section will identify processes of transformation across the cases, including the emerging contradictions that enabled an expansion and transformation of new horizons and possibilities.

#### 9.2.3.1 Becoming of volunteers

Sections 9.2.1 and 9.2.2 concentrated on the object and the subject of activity respectively, and this section outlines the transformation of these two aspects in the charity and voluntary environment through the practices of training. As described in section 9.2.1, subjects within the system of each charity both formulated and instantiated the object of volunteer activity, which took place through the dialogic and interactive practices of training. Through this process, both subject and object were transformed, following how Roth (2007b, p.660) describes the subject-object dialectic as ‘mutually exclusive yet constitutive of each other.’ For example, across all cases as the volunteers, acting from their unique position in the system and their own historicity, worked towards the object their perspective of it was transformed. This was seen in CS1 as the emotions of volunteers were mediated to gain knowledge of stroke. In CS2 previous beliefs of volunteers were re-mediated to change their perspective of sexual violence. In CS3 the joint values of subjects and the system were mediated to create a
new understanding of living with HIV. This transformation drove volunteers forward in, not only acting on the object, but also in their own learning and development.

The process of re-mediation was not always visible to the volunteers themselves. For example, in CS2 volunteers like Rebekah did not feel that they had drawn upon any previous skills or knowledge within the activity and did not view themselves as contributing to the learning of other volunteers. However, when volunteers drew upon their previous beliefs and perspectives they became more aware of the re-mediation process. As Rebekah expressed in CS2, ‘There’s nothing I’m doing differently necessarily, it’s just that I feel really different.’ Therefore, following Vygotsky (1987), it is the dialectic relationship between affect and intellect that makes the transformation of both subject and object possible and enables the process of becoming as outlined in TAS (Vianna and Stetsenko, 2011), which is grounded in practices of collaborative transformative (Stetsenko, 2012). This could be seen across the cases when volunteers experienced contradictions between the imagined outcome of activity and their ability to act on it. This was seen most clearly in CS2 in the training session on sexual violence and the law, which volunteers described in emotional terms, such as ‘depressing’, ‘angry’, ‘unfair’ and ‘frustrating’. This session was identified by the trainers as the most ‘challenging’ and ‘heavy’, with the potential to ‘crush’ the hopes of volunteers.

Although volunteers may have entered training with an awareness of the ‘harsh reality’ (Nadja), what Stephanie described as ‘the enormity of it […] the stats and the depressing headlines’, they were confronted with it through the practices of training. This confrontation involved volunteers questioning existing accepted practice (Engeström, 1999a) and the status quo (Stetsenko, 2014). A similar, although less striking, confrontation took place in the other cases. For example, Greg in CS1 described realising through training practices that stroke was not ‘only in the elderly’, but also ‘young people who have strokes and babies having strokes’. In CS3 volunteers described learning about HIV treatment in training and being confronted with
how people living with HIV are ‘affected by HIV and their commitment to medication and care’ (Michael, CS3). As volunteers were confronted with these contradictions, rather than a destructive transformation as Engeström (2009a) describes, or as Nadja describes ‘crushing’ and ‘destroying the hope of volunteers’, an expansive transformation took place. Engeström (2009a, p.25) describes such a transformation as occurring when subjects face these ‘contradictions and resolve them in a way that radically expands its object and realm of possible actions’. For volunteers like Joni in CS2, ‘the realisation that these crimes are going to go unpunished’ motivated volunteers to work on the object, as she expressed: ‘well I definitely need to do it now!’

The potential for a destructive transformation could be seen across the cases when personal experience of the object obstructed learning for volunteers. Rather than expanding the object, volunteers were restricted to their own experiences and Gillian in CS1 emphasised that volunteers ‘have to remember that that’s their experience and that person they’re supporting could have a very different experience.’ In CS2, Klara outlined the danger that training and the volunteer activity could be ‘personally triggering’ for women who had experienced sexual violence themselves, which may lead to them ‘feeling overwhelmed’ and leaving the activity. This highlights the need for the individual experiences of volunteers to be placed within a wider societal context to enable them to become ‘active and indeed activist agents of learning and of wider community practices’ rather than ‘merely “undergoers” of the very struggles they were facing’ (Vianna et al., 2014, p.77).

Learning became meaningful to volunteers when it drew upon and helped to develop what Vianna and Stetsenko, (2011, p.320) describe as ‘a meaningful life project centered on commitment to changing social and community practices.’ Volunteers described qualitative changes within themselves in relation to their activity, which could be explained by the process of becoming, which is a continuous, ongoing, ‘work-in-progress’ (Stetsenko, 2014, p.192). Stetsenko (2008) argues that in the process of subjects collaboratively changing their world, they also come to know themselves and
ultimately become human. In CS1 David described an almost becoming of the object: ‘I feel that I’m the face of stroke, I feel that I’m the voice of stroke […] yes I feel that I’m the face of stroke in whatever I do’. Across the cases, volunteers expressed a negation of their previous knowledge and the realisation of new possibilities: ‘my knowledge was limited and I probably thought it was more comprehensive than it was’ (Michael, CS3), ‘I thought I had more knowledge than I did at the start, then at the end I was like – oh well I knew nothing!’ (Joni, CS2), ‘I’d heard of [stroke] but I really didn’t know anything’ (Jerry, CS1).

The object in all cases was continuously changing due to being acted on within and outside the system. The dynamism of the object produced a contradiction across all cases between the ‘need to know’ (Nadja, CS2) through systematic teaching of scientific knowledge, and the requirement to learn ‘what’s not yet there’ (Engeström and Sannino, 2010, p.2) as ‘things come up’ in the volunteering activity ‘and you’ve no idea’ (Glenn, CS1). Referred to as ‘the gap’ by Noel in CS1 and Sophia in CS2, volunteers addressed this contradiction by participating in a process of ongoing learning. Sophia in CS2 described how within the volunteering activity you continue to ‘train yourself’ by continuing the dialogic practices present in training. Greg in CS1 explained how he felt he was ‘training and learning all the time’ in his volunteering activity as he encountered many different aspects of stroke, therefore widening his horizons. This widening of horizons was not just limited to the object of volunteering activity for Greg, as it also included other learning opportunities, such as poetry writing. This follows the personally transformative learning process in TAS where new horizons are opened up for personal and social growth (Vianna and Stetsenko, 2011). More widely, Engeström (2001) describes this widening of possibilities through the reconceptualisation of the object and motive of activity as expansive transformation. This finding reflects the description of ‘runaway objects’, such as the ones in this study, as generating ‘opposition and controversy’, but also affording ‘radically new possibilities of development and well-being’ (Engeström, 2008, p.227).
9.2.3.2  
Transformative agency

The unique position of volunteers within the system affords them an agency over their learning, as outlined in section 9.2.2, which can be transformative. Transformative agency, as described by Haapasaaria et al., (2016), could be seen in CS1 and CS3 as subjects faced contradictions within the system and became agents of their own learning. For example, when Kayla in CS3 felt inadequately prepared to perform the role she was asked to take on, she asserted her agency to look for new possibilities to overcome this contradiction. Transformative agency also emerged when intersubjectivity was challenged through the amateur versus professional contradiction within the division of labour present across the cases. In CS3 Brett described how he and his fellow volunteers had asserted their collective agency to challenge specific tasks they were being asked to do, which brought about what Haapasaari et al. (2016, p.233) describe as ‘systemic change’. This ‘ability and will’ of subjects ‘to shape their activity systems’ is described by Engeström and Sannino (2010, p.20) as the ‘most important outcome of expansive learning’.

In CS1 the activity of volunteers performing blood pressure checks was almost paralysed when a contradiction emerged between the rules of the system and their position within the system. In the event of a high blood pressure reading, volunteers knew they should ring an ambulance, but felt ‘we really aren’t qualified to do that’ (Noel, CS1). Volunteers such as Noel and Greg had addressed these contradictions by driving forward their own learning. Hazel in CS1 also pursued her own learning to overcome her position of not being ‘medical’ in her volunteering activity of presenting information on stroke to a medical audience. Therefore, volunteers had broken away ‘from a given frame of action’ and had taken ‘initiatives to transform it’ (Haapasaari et al., 2016, p.235). Transformative agency and independent learning was less evident in CS2, where the value volunteers placed on knowledge within the system restricted their motivation to pursue their own learning. As Joni described when she
independently began to look for further information about rape and the law: ‘I’m just going to stick with what they told me at CS2! [laughs] This is doing more harm than good!’

The division of labour and subjectivity of volunteers within each case could constrain the ability of volunteers to ‘shape their activity systems’ (Engeström and Sannino, 2010, p.20) and restrict their agency to search for new possibilities and pursue their own learning. In CS1 David described his access to learning opportunities as being limited by his position as a volunteer within the charity where it was ‘other people’s decisions whether you are invited to those courses’ and that certain information was withheld: ‘because it’s not for volunteers, it’s for staff only.’ Rebekah in CS2 and Alejandro in CS3 also described how the learning of volunteers was restricted when they were not regularly involved in the volunteering activity, and were positioned more as a peripheral member.

9.2.3.3 System transformation

Volunteers across all cases were deliberately made a part of the organisation and historically they had played an important role in developing and implementing the work of each charity. In CHAT terms the charities had been transformed for volunteers, who were also able to have a transformative effect on the system. For example, the work of CS1 volunteers was recognised by creating a new role of ambassadors, and CS1 and CS3 both had ‘bespoke’ roles to cater for volunteers entering the system who did not fit in with the ‘standard’ roles. Certain volunteers across all cases had also moved into the position of trainer within the charity, which demonstrates a flexibility of boundaries within the system. Rather than this process being a vertical progression, in this study it was conceptualised as an expansion of horizons (Engeström, Engeström, and Kärkkäinen, 1995) as volunteers like Jacqueline in CS3 moved back and forth between trainer and trainee within the system. Staff also learned from the experiences and
contributions of volunteers, as Eiliyah in CS1 described when she emphasised the importance of hearing and seeing personal experiences of stroke survivors ‘first hand’.

Training provided volunteers with access to knowledge, tools and collaborative assistance in what could be described as a zone of proximal development (ZPD). In the ZPD created by training, volunteers were guided by ‘more able partners’ (Luckin et al., 2003), which included staff and other volunteers involved in training practices. Within a ZPD, the more subjects learn the greater their possibilities for development (Vygotsky, 1978), which could be seen across the cases. For example, volunteers like Michael in CS3 felt able to take on more responsibilities and tasks through participating in training, which expanded his horizons and also the possibilities for the charity. Therefore, the unique position of volunteers within the system, and the intersubjectivity that coordinated their work on the object created expansive opportunities for the collective activity (Williams et al., 2007). In CS3, Joshua described how the position of peer mentor volunteers enabled them to share their personal experiences and opinions in a way he, as a staff member, could not. Nadja also described how existing volunteers in CS2 support new volunteers because they remember how they were ‘helped and supported to lose their fear from the helpline to really get going’ and are willing to return this help and support.

Rules within the system, which regulated the volunteering activity, both constrained and expanded possibilities for development. This was illustrated by the re-orchestration of the multiple voices within the system, which aimed to create and sustain shared values according to these rules. This process of re-orchestration is different to re-mediation in the way that the individual voices are becoming a collective voice, mediated by the rules and values of the system. However, multiple voices can create contradictions with the potential for transformation or destruction, and, as outlined in section 9.2.2, intersubjectivity involves disagreement as well as agreement (Matusov, 1996). There was room for disagreement within training; for example in CS3 where training was described as a ‘safe space’ and volunteers did not have to ‘know the
answers and it’s fine to make mistakes’. However, voices within training had to be re-orchestrated within the rules of the system before subjects were accepted into the volunteering activity.

Kayla described how the view of one volunteer in the group had come into conflict with the rules and values of the system. As she said, ‘you’ve got to hear that isn’t right’, and this is similar to how Klara described ‘correcting’ any views that come into conflict with the values and rules of the system in CS2. Whilst the object of the volunteering activity, as discussed in section 9.2.1, was developed through dialogue between subjects within the practices of training, the rules were less open to transformation by volunteers and from their position in the system there were few opportunities to create new or challenge existing rules. As Joshua said in CS3, ‘down the middle is CS3 saying these are our visions and values, these are what our policies are, and this will not be breached’. However, the situation Kayla described in CS3 shows the emergence of a collective subject with collective responsibility and what Lektorsky (2009, p.79) describes as ‘a “we” feeling’. This collective subject is able to become the ‘bearer of rules and activity’ (ibid. p.82) within the ‘collective instrument’ (Engeström, 1991, p.256) of the charity, and, as Klara described in CS2, volunteers then enforce the rules themselves by challenging each other through the dialogic practices of training.

When contradictions emerge within an activity, intersubjectivity can break down and the system can either collapse or emerge in a new form (Williams et al., 2007). This could be seen across the cases in the amateur-professional contradiction within the division of labour. In CS1 volunteers taking blood pressures experienced the contradiction of carrying out a professional service from an ‘amateur’ position, which at times of crisis almost paralysed the activity. In CS3 tensions emerged through the different perspectives on the role of volunteers and the activity they should be doing, as described by Brett as ‘the fine line’ between volunteer and staff activity. In both cases these contradictions led the system to emerge in a new form as volunteers expanded their learning in CS1 and the division of labour was transformed in CS3.
9.2.3.4 **Collective and social transformation**

Across the cases, knowledge was made meaningful to volunteers through the practices of training and this process held the potential for much transformation. Knowledge was directed at the object of activity and imbued with values across all cases and could be described in this context as ‘an ideology-driven practice’ (Stetsenko and Arievitch, 2014, p.74). Knowledge as a collaborative process within the system became a tool for volunteers, not only for their own personal development but also within and beyond the system. For example, in CS1 volunteers discussed how the knowledge they had gained about stroke had been useful in assessing their own lives and also how they had shared that knowledge with family and friends. For volunteers like Greg, the knowledge he described as gaining through training had also widened his possibilities within the charity, where, similar to Michael in CS3, he had been able to take on further roles and responsibilities. Thus, the wider transformative potential of this knowledge goes beyond viewing it as something to be ‘transferred’ from one situation to another. Knowledge as a tool continued to be regulated by the rules of the system as it was shared beyond the charity. This was most visible in CS3 where volunteers talked about sharing the correct ‘vocabulary’ and ‘terminology’ outside the system, which were developed through training practices.

The wider transformation of the volunteering activity was not limited to subjects distributing knowledge beyond the system, but also involved them spreading what CS1 volunteers described as ‘the passion’ and ‘the enthusiasm’ they felt about the object of their volunteering activity. This view was echoed by the trainers across the cases as they expressed the desire for subjects to not only draw upon the knowledge learned in training in their volunteer activity, but also in their lives beyond the charity. This view was particularly prominent in CS2 where it was explicitly mentioned in the training I observed and in the interviews with staff members.
As volunteers were transformed through the practices of training, which for many volunteers involved feeling more confident in addressing the object, they were able to pursue the object beyond the system of the charity as part of wider transformation. This wider transformation mainly took the form of continuing the dialogic practices of training. For example, Kayla in CS3 described her experience of creating a dialogue outside her volunteering activity, which brought the object of HIV to people’s attention, and volunteers like Sophia in CS2 said training had provided her with the confidence to ‘talk about sexual violence properly’. Subjects described this wider transformation as a ‘ripple effect’ (CS1), a ‘multiple effect’, ‘perpetuating the training’ and ‘snowballing’ (CS2). This challenges the criticism that expansive learning is conservative, only reproducing the system (Avis, 2009) and follows the wider transformative potential as outlined in TAS.

9.2.3.5 Summary

These case studies demonstrate that as volunteers work towards the object of the volunteering activity they transform the object, themselves and the system through the dialogic, interactive practices of training, which are mediated by emotion. Through the practices of training volunteers became able to pursue the object beyond the system of the charity, which led to wider transformation. The cases show that volunteers do not just exist or act within their environment, but they both constitute and are constituted by their environment in a continuously changing process. More knowledgeable subjects within the charities created a ZPD that motivated learning and expanded possibilities for the whole charity. This process contained many contradictions, such as contradictions within the division of labour, which had the potential for both transformation and destruction of the system as volunteers began to question the status quo. Knowledge, rules and emotion became transformative tools across the cases and these tools helped to re-orchestrate the multiple voices within the system according to the values and rules of the charity.
Transformative agency, which often manifested itself across the cases through independent learning, highlights the importance of the re-orchestration of voices according to the rules and values of the system. Enacting knowledge distributed in training was a key part of the volunteering activity, resulting in ongoing, continuous learning, which addressed the contradiction of the need to ‘know’ certain knowledge, taught through training, and the perceived impossibility of being completely prepared for the role. Overall, the dynamic and jointly constructed nature of the object required volunteers to continuously expand the possibilities of their activity as they had to learn ‘what is not yet there’ (Engestrom and Sannino, 2010, p.2).

9.3 Nuances between cases

So far this chapter has presented the themes shared across the cases interpreted through the theoretical framework. However, some themes emerged with a stronger emphasis within each case. This section aims to discuss different aspects of the same cross-cutting phenomenon of learning to illuminate the theory and show how aspects arise in different ways. It is hoped that an examination of the nuances between cases will deepen understanding and contribute to answering the research questions of the study. All aspects highlighted in the following sections, including emotion, perspective and rules, are potential sources of contradictions, which are central to the theoretical framework in considering expansive and transformative learning.

9.3.1 The emotional connection to the object

The subjective dimensions of activity are identified in the perspective and needs of the subject, which are expressed through emotion (Leontyev, 1974). As was outlined in Chapter 3, within CHAT emotion is not conceptualised as an ‘inner state’, but as an expression that reveals ‘the social nature of needs and desires’ within the system that drives forward the object of activity (Nardi, 2005, p.48). This dialectical relationship
between affect and intellect is described by Vygotsky (1987), as what makes transformation possible and CHAT scholars such as Nardi (2005) outline the transformative potential of the emotions of subjects on the activity and particularly its object.

The emotions of volunteers in all cases both helped to bring subjects together in their collaborative activity and to drive the activity forward, but contributed a slightly different role in each case. The theme of emotion emerged most prominently in CS1 by volunteers relating the object to personal experiences. For example, Greg talked about being ‘happy’ in his volunteering activity if he could help ‘somebody who like myself when it happened didn’t know anything about stroke’. David described hearing the experiences of volunteers who had had a stroke as ‘new knowledge, that’s good [slight pause] diamond knowledge that you can pass on to people and help – perhaps help them to understand’. The mediation of these experiences and the historicity of volunteers expanded the horizon of possibilities for subjects within CS1. Volunteers in this case also expressed what Roth (2007a) describes as ‘positive emotional valence’ as feelings developed through volunteering, such as ‘passion’, ‘joy’ and ‘pride’, continued to motivate them within the activity. The integral role of emotion in motivating volunteers to learn about the object was illustrated by David comparing the passion he felt about learning about and acting on stroke, to how he felt about learning and acting on diabetes. Even though David had personal experience of diabetes, his lack of ‘passion’ for it meant that he had ‘never bothered to learn about it.’

In CS2 emotion emerged particularly when volunteers talked about their frustrations and anger regarding the session on rape and the law. In this case training practices strengthened the emotional connection of volunteers to their activist pursuits and shared values of the charity. However, while emotion seemed to be very strongly tied to historicity in CS1, which is conceptualised as a key aspect of positioning the stance of volunteers towards the object, emotion was demonstrated differently in CS2. Rather than being linked to the historicity of volunteers, emotion was directed at the future, as
volunteers imagined themselves acting on the object and overcoming contradictions in the activity to do so. For example, both Rebekah and Joni talked about how the frustration and anger they felt about rape and the criminal justice system had further motivated them in the volunteering activity.

In CS3 emotion was integral in the creation of shared values within the volunteering activity. Volunteers like Jacqueline brought into training the emotion she felt about the object of people living with HIV that had originally motivated her to get involved in volunteering. Kayla also drew upon her emotions during the training session where a volunteer was expressing stigmatising views that opposed the values of the charity. This emotion enabled Kayla to position herself within the values of the charity alongside other volunteers. While volunteers in CS1 talked about emotion being integrated within their volunteering activity, in CS2 and CS3 emotion was prominent in the practices of training. Volunteers in both cases talked about the ‘emotional pressure’ (Terry, CS2) and the ‘powerful’ nature (Jacqueline, CS3) of the role-plays used within training. The multiple voices within these two cases, including the voices of service users, became mediating tools for learning, whereas in CS1 specific personal experiences of volunteers became mediating tools. As tools these personal experiences had the potential to transform the perspective of the object for volunteers. This was in contrast to CS2 where the sharing of personal experiences was discouraged by the trainers and even became a rule of the training practice.

How subjects were positioned within the activity through their historicity was also generally different in CS1 to the other two cases. Volunteers I spoke to in CS1 were all retired from work, whereas the volunteers in the other cases were younger and employed, some in areas relevant to their volunteering role. These subjects, therefore, have different external activities and different motives for their activity. In CS1 there also seemed to be more openness among volunteers to share their personal experiences and this was encouraged through practices of training. In the other two cases subjects were less open and less encouraged to talk about their own
experiences of the object. This lack of inclusion of personal experience could be linked to the increased stigma acknowledged to be connected to the objects of sexual violence and HIV, which was an integral part of training practices.

In CS1 transformation became possible for subjects through the mediating tools of personal experiences and David even described how he felt as though he had become the object: ‘I’m the face of stroke, I feel that I’m the voice of stroke’. This process was unique to this case and could be explained by the strong role of emotion within the activity. The emotional connection to the object created a contradiction for volunteers as they were motivated to learn and participate in training opportunities to enable them to act on the object, but could also be prevented from doing so due to their position in the system. In CS2 transformation occurred through what is described in expansive learning and TAS as a questioning of the status quo, which was provoked by the changing perspective of the object for subjects through the practices of training, mediated by their emotions. In CS3 transformation occurred as voices within the system were re-orchestrated according to the values and rules of the system. The role of emotion in this re-orchestration was closely linked to these values.

As well as driving activity forward, the emotions directed at the object in each case could also create conflict and contradictions within the system. In CS1, while personal experiences could become mediating tools for learning, they could also prevent volunteers from working on the shared object when they were not re-mediated through the practices of training and volunteers ‘get stuck’ (Gillian, CS1). In CS2 the emotions of volunteers when they imagined acting on the object in the helpline role, which included ‘anxiety’ and ‘fear’, had the potential to paralyse the activity. Their emotions of ‘anger’ and ‘sadness’ could also make the object seem unattainable. Therefore emotion, which does not appear prominently in either expansive learning or TAS, was integral to the transformative processes of learning across the cases.
9.3.2 The changing perspective of the object

Across all cases, volunteers said they felt as though they had gained new knowledge relating to the object, but this process of learning manifested itself in different ways. In CS1 many of the volunteers said that before participating in training, they had no knowledge at all about stroke, even when they had experienced it themselves. Training practices therefore introduced them to new concepts, such as the communication condition of aphasia and blood pressure measurement. In CS2, volunteers had some knowledge about the object and knew ‘the numbers and the facts and the percentages’ (Hayley), but felt that the practices of training had challenged them to ‘accept those facts’ and see them from ‘the perspective of a survivor’ (Terry). In CS3 volunteers placed more importance on the rules and values regulating the knowledge within the system, rather than the knowledge itself. Whereas volunteers in CS1 and CS2 described ‘knowing nothing’ when they came into training, volunteers like Brett in CS3 felt he did not learn anything ‘new’ about HIV. However, through the practices of training, volunteers in CS3 were able to construct a new perspective of the object through the rules and values of the system, which enabled them to feel able to treat service users ‘correctly’ (Kayla, CS3).

In CS2 the perspective of the object for volunteers changed throughout the practices of training and through their volunteering activity. This was in contrast to CS1 where a lot of the volunteers in the study said they did not have any knowledge of stroke when entering the activity, and to CS3 where a lot of volunteers said their perspective of the object had not changed through their participation in training. The potential for transformation within each system was influenced by these subtle differences in how the perspective of the object changed for volunteers. For example, the process of becoming was a prominent theme in CS2 as the perspective of the object was transformed for volunteers, which in turn transformed the volunteers themselves. The process of becoming was less prominent in the other cases, particularly in CS3, which could be explained by the lack of transformation in the perspective of the object.
The change in perspective of the object created inner contradictions for volunteers in CS2, as it came into conflict with their existing beliefs. This was particularly highlighted when the volunteers talked about the session on sexual violence and the law. Through the practices of training they began to question their previous beliefs and experiences, which could be seen as the first stage of expansive learning. This type of questioning was seen to a lesser extent in the other two cases. In CS1 volunteers were learning new knowledge, which involved less questioning, even of their own personal experiences. In CS3 there was more focus on rules and values, which was generally not questioned by volunteers who were already subscribed to these rules and values and saw training as providing more of ‘a little nudge, back to being aligned’ (Kayla, CS3).

In CS2, as the perspective of the object was transformed for volunteers, and contradictions within this process were addressed, volunteers themselves were also transformed. This could be seen as a developmental process (Foot, 2002) and a process of becoming (Stetsenko, 2012) as volunteers talked about ‘feeling really different’ and a change ‘in the way I think about the world’. In CS1 and CS3 volunteers expressed a change in how they felt able to engage in the volunteering activity, but in CS2 this process of becoming seemed to be more closely linked to the object and how volunteers felt able to address it beyond the charity. This process could also be described as expansive learning, as it led to ‘the formation of a new, expanded object and pattern of activity oriented to the object’ (Engestrom and Sannino, 2012, p.51).

The change in perspective in CS2 was achieved mainly through participation in the dialogic activity of volunteering and practices of training. The perspective of the object was transformed for volunteers, from something ‘scary’ and ‘embarrassing’ (Rebekah, CS2) to something obtainable, that ‘it was ok to talk about sexual violence properly’ (Sophia, CS2). This transformed perspective also transformed the volunteers as they became more confident in pursuing the object beyond the system and took a stance towards it as they realised their own potential to act on it. This process involved
volunteers being able to ‘imagine what does not yet exist, what they think needs and ought to be created and struggled for’ (Stetsenko, 2014, p.185) (italics in original).

Therefore, the ‘ideal’ aspect of the object (Foot, 2002) was an integral part of how volunteers were transformed, as the imagined outcome of their volunteering activity drove them forward. This imagined outcome, or driver of social change (Stetsenko 2014), contributed to the development of the object. More widely, imagining a different outcome to the current status quo was also integral to the charity and the volunteering activity, as was reflected in the vision and aims of each case. CS1 imagined a world where there are fewer strokes and help is available for anyone affected by stroke, CS2 imagined a world where women who have experienced sexual violence are listened to, believed and supported, and CS3 imagined a world where people living with HIV lived happy and healthy lives, free from stigma and discrimination.

Pursuing the object beyond the system was seen to a lesser extent in CS1 and CS3, where volunteers felt able to share the knowledge they had gained through their activity, but appeared less driven than the CS2 volunteers to distribute it outside the system. David in CS1 described the training as ‘specialist and therefore it’s generally to do with the role that I’m doing’. Brett and Michael in CS3 talked more about applying the skills they had learned through their volunteering activity, rather than distributing knowledge about the object, and Kayla said she felt confident to have the ‘right terminology’ but that she did not ‘purposefully want to challenge people’s opinion’ outside of the charity. However, whilst agency for transforming the system and beyond appeared strongly in CS2, there were fewer examples in this case of volunteers expressing transformative agency towards their own learning. The value volunteers placed on the knowledge within the system seemed to constrain their desire to engage in independent learning outside the system, unlike the other two cases. This value was described by Joni when she gave up trying to find further information on rape and the law on her own, deciding to ‘stick with what they told me at CS2’ because she felt that her own independent learning was ‘doing more harm than good’. The lack of
transformative agency in CS2 could be explained by the lack of contradictions experienced by volunteers in the division of labour, which were identified more strongly in the other cases, particularly in CS3.

Overall, knowledge accessed in training could be described within a relational ontology (Stetsenko, 2008) as a purposeful and dialogic activity through which volunteers addressed inner contradictions to transform their perspective of the object and at the same time themselves. Through working towards an imagined outcome the object of volunteering activity was expanded, which enabled wider, social transformation.

9.3.3 Rules and values regulating the activity

Rules of the system played a prominent role in CS3 and seemed more visible within the volunteering activity and practices of training than in the other cases. Within CS3, subjects talked about the strict rules that enforced the values within the object. These rules became tools to be used in the volunteering activity, and included the ‘correct vocabulary’ and ‘correct terminology’, which gave volunteers the confidence to act on the object. To some extent, rules could also be seen in CS2 through the values held by the charity towards certain calls. For these situations, Terry described how volunteers were told: ‘This is the rule. You don’t have to think about it, this is our approach’, and her relief at knowing ‘as an organisation we do this we don’t do that, and it takes away having a dilemma about how you respond.’

In CS1 rules were most prominent within the division of labour as they positioned volunteers within the system. The rules could create contradictions within this division, particularly between their ‘amateur’ position and the ‘professional’ expectations of their role. Volunteers in CS1 addressed such contradictions within the division of labour by advancing their own learning and knowledge in relation to the object. For example, Hazel ‘spent a lot of time researching’ and Noel described ‘Investigating it a little bit more’. To some extent, volunteers in this case were transforming themselves to fit into
the system. Such a transformation could also be seen in CS2 as volunteers adopted the values and beliefs of the system. For example, Rebekah described her initial surprise that the charity was ‘quite passive’ and that ‘it’s for listening and there’s not really any doing’. However, through the practices of training her perspective had been transformed on ‘just how beneficial listening really is’ (Rebekah, CS2).

In contrast, when volunteers faced similar contradictions in CS3 within the division of labour, they talked about changing the system rather than themselves. Brett described how himself and other volunteers had successfully challenged the work they were given because ‘that’s not in the [volunteer] role description so they shouldn’t be doing anything like that’. This situation illustrates transformative agency as subjects are faced with ‘disturbances and contradictions in a local activity’ and through interaction take ‘actions to transform the activity and its current work practices’ (Haapasaaria et al., 2016, p.257). The situation Brett described follows the idea of subjects transforming rather than adapting to the world (Stetsenko, 2014). Kayla also expressed transformative agency in her refusal to engage in the volunteering activity until she had received the training she deemed necessary to do the role. This was in contrast to David in CS1 who similarly felt that a lack of information was impacting on his ability to engage in the volunteering activity but was resigned to believe that ‘it’s not my decision it’s not up to me so, it’s a pity but it’s not.’ Therefore, there appeared to be more opportunity for transformative agency within CS3, as volunteers overcame contradictions within the system. This could be due to the prominence of values in this case that were related to the object. While volunteers in CS1 had a personal and emotional connection to the object, the connection of the object to shared values for volunteers in CS3 enabled and encouraged them to ‘search for new possibilities’ within the system (Haapasaaria et al., 2016).

Training in all cases involved a re-orchestration of the multiple voices within the system to create shared values and work towards the object. This was particularly noticeable in CS3, where values were a prominent aspect of the volunteering activity and also in
CS2, where in one particular training session volunteers were invited to share and discuss ‘any kind of judgments they’ve heard about women who’ve experienced sexual violence’ (Klara). In CS1 rather than being ‘re-orchestrated’, voices of stroke survivors became tools for volunteers to use in their volunteering activity. Training in CS3 was very much a practice that re-orchestrated the multiple voices within the system through the development of shared values according to the rules of the system. This re-orchestration was shown when Joshua described how during training the perspectives of HIV from different generations were both equally useful as tools for learning within the training group, but that ‘down the middle is CS3 saying these are our visions and values, these are what our policies are, and this will not be breached’. Such regulation highlights a conflict with the ‘freedom’ of the learning environment identified by volunteers like Noel in CS1 and the intention of trainers like Alex in CS3 for training to be a place where volunteers can ‘make mistakes and say the wrong thing’. If shared values could not be created, there was destruction within the system as subjects who did not share these values were ejected, as was described by trainers across all cases and particularly highlighted in CS3.

Overall, rules of each charity were shown to regulate activity as theorised in expansive learning (Engeström, 1987), but findings, particularly from CS3, showed how these rules protected the values and the ‘ethical dimension’ that are central to learning and development in TAS (Stetsenko, 2012).

9.4 Summary

This chapter has outlined the shared themes across the cases, as well as the themes emphasised within each case. Three cross-case themes of dynamic object, subjectivity and transformation were identified, which together explain how volunteers, from their unique position in the charity, work collaboratively on dynamic objects, which enables both individual and social transformation. Nuances between the cases highlighted how
training practices create and sustain: an emotional connection to the object; a transformed perspective of the object which in turn transforms volunteers; and values imbued in the object through rules and the re-orchestration of multiple voices. The next chapter discusses how these themes work together to answer the research questions posed at the beginning of the study and suggests areas for further reflection and future research.

10. Discussion

10.1 Introduction

This study has argued that the training of volunteers in UK health and social care charities is an important, yet under-researched, area of learning. A range of literature was critically analysed and discussed in Chapter 2, which outlined the potential for powerful learning experiences created by: the position of volunteers within charities, their multiple experiences and historicity, the dynamic and complex causes the charities address and the unique environment of the charity and its social and cultural context. The tendency of existing studies in this area to examine learning through a dichotomous approach was highlighted, such as informal and formal learning, or knowledge acquisition and participation in practices. Literature on workplace learning was drawn upon to suggest that such an approach can only offer a limited insight into learning and risks ignoring the context within which volunteers are learning and the potential for change and transformation. Although the limitations of this dichotomised approach have been recognised in educational research, little attention has been paid to it within the charity and voluntary environment, and therefore my study aimed to address this gap in knowledge. This dichotomised approach was also recognised as being reflected in government policies that assume volunteers can unproblematically apply knowledge and skills from charities into the workplace.
In Chapter 3, Cultural-Historical Activity Theory (CHAT) was introduced as a theoretical perspective that could support the development of a new understanding and conceptualisation of learning within volunteer training in UK charities. Chapter 4 specifically outlined and synthesised the CHAT-informed learning theories of expansive learning (Engeström, 1987), developed in workplace learning studies, and Transformative Activist Stance (TAS) (Stetsenko, 2008), developed in studies of social change. In Chapter 5, these two theories were proposed as a theoretical framework that would be drawn upon in this study in order to explain learning within the charity and voluntary environment.

Chapter 6 presented the research design of the study which involved a multiple case study of three charities based in North West England that address the complex and challenging causes of stroke, HIV and sexual violence. The use of multiple qualitative methods was proposed to capture the multiple voices and interaction within the volunteering activity and practices of training within each case. The analytic approach of abduction was outlined in Chapter 7, which allowed a systematic interrogation of the data, as well as interpretation through the theoretical framework. Chapters 8 and 9 presented the empirical findings from the three cases, including the within-case analyses and the cross-case analysis.

The findings presented in Chapters 8 and 9 applied to the people and organisations of the study at that point in time. This chapter aims to move beyond these empirical findings in order to address the research problem and position the findings more widely, including both theoretical and practical implications. In the following sections the research questions will firstly be addressed and then three themes that have emerged through the study, informed by the theoretical framework, will be discussed as further research implications. These three themes of contradictions, subjectivity, and emotion and imagination are key themes from CHAT and are intended to provide a dialectic understanding of learning within volunteer training. This understanding intends
that each theme is not viewed as a separate ‘influence’ on the learning of volunteers, but is conceptualised as integral moments of the volunteering activity.

10.2 The role of the charity environment

RQ1. What is the role of the charity environment on the process of learning for volunteers being trained for service-providing roles?

10.2.1 Introduction

This study aimed to explore the role of the charity environment on the learning and development of volunteers. Within the CHAT-informed dialectical relationship outlined in Chapters 3 and 4 between the individual and the social, this exploration included examining how the position of volunteers within the charity, as well as their historicity, interacts with this environment specifically through practices of training. Gaining an insight into the learning experiences of volunteers aimed to increase understanding of how learning can be understood, supported and sustained within this context.

10.2.2 Societal challenges as motivating objects

In the charity environment, and specifically within health and social care charities, volunteers learn about important societal ‘life or death’ issues that they do not necessarily have the opportunity to learn about in other areas of their lives. This research indicated that rather than being static concepts that are ‘well known ahead of time’ (Engeström and Sannino, 2010, p.3) these issues are complex and dynamic and, therefore, require ongoing learning. Volunteers need scientific knowledge, such as the meaning of blood pressure readings and HIV treatment, to carry out their activity, but they also need the opportunity to make sense of this knowledge, drawing upon their existing knowledge and experience through dialogue, and to incorporate it with their own desires and motivations. Practices of training offer the opportunity to combine
personal experiences with scientific knowledge in order to act on a shared object, according to the rules and values of the charity.

The challenging topics that volunteers learn about within health and social care charities, which integrate personal experiences and multiple voices, provide useful examples of how knowledge can be made meaningful to learners in accordance with their values and develop an activist stance (Stetsenko, 2012). They are also useful examples of learning about dynamic topics that are never static but constantly changing. Therefore, training in this environment cannot assume there is a set, known answer and must enable volunteers to learn ‘what is not yet there’ to create new possibilities, practices and ideas (Engeström and Sannino, 2010, p.2). Exploring learning around these topics intends to increase understanding of how they can be addressed more widely and contributes to existing research around other societal challenges that Engeström (2008) describes as ‘runaway objects’. This study has shown that the charity and voluntary environment offers the opportunity to study how such objects are worked on and addressed through collaborative activity.

Exploring learning around societal challenges provided a way to look at the role of imagination and emotion in learning and these appeared in the data as powerful tools for motivating volunteers. For example, in CS2 when volunteers imagined acting on the object of sexual violence, this process was mediated by the emotions of sadness and anger they felt during training. Therefore, following Nardi (2005), findings show that accounting for these emotions or ‘passions’ can provide an understanding of the agency of volunteers within their activity. It is generally accepted that people will be more motivated to learn about a topic when they are interested in it, but looking at how volunteers learn about complex topics, such as the ones in this study, helped to explore how this motivation can be sustained, despite the tensions and contradictions that arise. This finding contributes to previous research in the area of volunteer motivation and volunteer burnout (e.g. Musick and Wilson, 2008). It also provides further insight into the reasons why training has been shown to sustain volunteer
motivation (e.g. Hidalgo and Moreno, 2009; Tang et al., 2010; O'Higgins, 2013) through the creation of a 'safe space' for volunteers to experience and confront the contradictions involved in imagining acting on the object of societal challenges. Overall, the object of the volunteering activity motivates volunteers to develop an activist stance and work towards an imagined outcome (Stetsenko, 2012). Within this dynamic process volunteers are required to learn 'what is not yet there' (Engeström and Sannino, 2010, p.2). The next section examines how volunteers are positioned, and how they position themselves, within the volunteering activity in order to work towards the object.

10.2.3 Legitimising the position of volunteers

The concept of subjectivity proved useful in this study in order to analyse the specific position of volunteers within the volunteering activity and how this afforded and constrained their learning within the practices of training. The study chose to draw upon the definition of subjectivity from Williams et al. (2007, p.3) as how a subject is 'subjected' to an activity and 'the particular, possibly chosen, aspect that a subject presents in relation to the object of activity.' Subjectivity was drawn upon in this study rather than the concept of identity because this definition involves the subject-object dialectic and aligns with the description from Vianna and Stetsenko (2014) of the 'activist stance' towards the object of activity, which enables transformation. This definition is particularly relevant for volunteers, who may have different personal reasons for volunteering, but whose shared motivation is the cause of the charity. Overall volunteers in this study engaged in training practices voluntarily and these practices were viewed as a 'reward' and as a tool that legitimised their position within the charity. That training practices enabled volunteers to bring together their individual motivations and the object of the charity was essential in affording this motivation. For example, across all cases the stance the volunteers took towards the service users of
the charity, for whom they did not want to ‘do a poor job’ or ‘mess it up’, motivated them to engage in training. They were also motivated by the ‘passion’ for the cause of other subjects within the activity and by acting with people who shared ‘the same kind of idea’ and ‘interest in this topic’. Therefore, the concept of subjectivity provided a way to analyse the learning experience of individual volunteers and their stance towards the cause of the charity, within the environment of the charity.

Volunteers also positioned themselves through their perception of other subjects in the activity. This included: distinguishing between the volunteers who contribute more within the division of labour, ‘some volunteers were doing a little more than others’ (David, CS1); the desire to get feedback within training from ‘an experienced person’, rather than someone on ‘your own level’ (Sophia, CS2); and the separation of subjects who did not share the same values, ‘what are you doing in this room?’ (Kayla, CS3). Volunteers, as subjects within the volunteering activity, are not a homogenous group and as the findings showed their multiple positions, voices and historicity create contradictions that can lead to a transformation of the system.

A particularly interesting contradiction within the division of labour was identified in the charities within this study. Volunteers are vital for the services these charities are providing and without them they often would not be possible. However, while the opportunities for transforming themselves and their wider communities have been outlined, it was clear that their opportunities for transforming the charity itself were limited. Volunteers are treated like staff members in the way that they complete an application form, they undertake training courses, and they are appointed a manager. This process of the professionalisation of nonprofit organisations such as charities has been criticised for threatening their ‘core identity as an arena for volunteerism and participation’ as well as their future development and role in society (Hwang and Powell, 2009, p.270). In other words, endangering the very essence of what distinguishes the charity and voluntary sector from the private and public sectors. This
tension could be described as a historically accumulating contradiction (Engeström, 2001) and thus provides an opportunity for transformation.

Volunteers themselves also enter the volunteering activity with the expectation of being treated in a similar way to staff and get frustrated when this does not happen. For example in CS1, David and Keith spoke about wanting to progress in their roles, but how there was no ‘pathway of achievement’. However, when volunteers like Noel and Rebekah recognised how the learning opportunities volunteering provides are different to work, this view offered opportunities for agency over their learning. Therefore, tensions can arise within the division of labour because volunteers are positioned differently to staff members within the charity. Across the cases, volunteers addressed these tensions by either becoming ‘agents of their own learning’ (Haapasaaria et al., 2016) and seeking out their own learning opportunities, like Kayla in CS3, or accepting the tensions and their position within the charity, like David in CS1.

Therefore, similar to the study by McDonald and Warburton (2003) volunteers can both sustain and transform the practices and culture of the charity. However, the environment of the charity itself could be transformed to overcome these tensions by acknowledging the unique position of volunteers and differentiating them from staff members. This particular contradiction would be interesting to explore further, particularly in light of current debates and criticisms concerning the promotion of volunteering as a way to make up for UK government funding cuts to welfare expenditure (e.g. Dominelli, 2016). The next section examines how the different backgrounds and experiences of volunteers contribute and constitute learning within the charity and voluntary environment.

10.2.4 Multiple voices and experiences as tools for learning

Volunteers enter charity organisations from a range of backgrounds with different experiences, knowledge and skills, which make a ‘unique contribution’ to the activity
(Stetsenko, 2012). This study has helped to show how these diverse personal histories can become tools of learning within training practices for, not only the individuals, but also for the group of volunteers and for the charity. As was outlined in Chapters 2 and 3, the historicity of volunteers is not just brought into training, but it interacts with and within the charity environment and positions volunteers within the charity. This was particularly the case for the personal experiences volunteers had of the cause of the charity, which formed an emotional connection to the object as shown by the experiences of stroke survivors in CS1. As in the study on the Inside Out project (Maclaren, 2015), personal experiences, which were shared through dialogue within group sessions and re-mediated for students, became powerful tools for learning.

However, my study further revealed the constraints and tensions within the learning process that can emerge from these diverse histories. As was outlined in the theoretical framework, within CHAT such tensions are historically accumulating contradictions, which offer opportunities for an expansion or destruction of the system. In CS1 these contradictions were explained by drawing upon the internally contradictory unity of use and exchange value that Engeström (2008), informed by Marx, conceptualises as the object of activity. The use value to volunteers of their personal experiences can be seen as they are mediated to position and motivate them towards the object of stroke in their activity of volunteering. However, when volunteers come to ‘exchange’ their experience within training or their volunteering activity, tensions arise because, as Gillian described, ‘their experience belongs to them’ and thus it becomes alienated from them. David warned that simply ‘passing on’ the experiences of a stroke survivor leads to these experiences getting ‘distorted’, which could be described as verbalism (Vygotsky, 1987) where there is no possibility of transformation (Freire, 1970).

Therefore, the idea of re-mediation is useful for charities to enable personal experiences of the object, which are insufficient on their own, to be transformed through the dialogic practices of training in order to create deeper insights into these
experiences and to place them within a wider societal context (Vianna et al., 2014). My study also showed how the creation of shared values according to the rules of the charity can support the transformation of personal experiences. However, the study highlights the importance of the intention behind these values and rules, particularly when they are transformed into tools of learning for volunteers. Accounting for the historicity of volunteers also allows knowledge to be conceptualised as a dialectic entity, which encompasses both prior and new knowledge (Roth, 2012). This conceptualisation addresses previous dichotomised views of learning, and instead allows learning to be understood as a process of movement and change where the previous knowledge of volunteers is sublated into a new form. In the case studies, particularly in CS2 and CS3, this process was seen through the negation of the existing knowledge of volunteers within practices of training and their realisation of new possibilities: ‘my knowledge was limited and I probably thought it was more comprehensive than it was’ (Michael, CS3), ‘I thought I had more knowledge than I did at the start, then at the end I was like – oh well I knew nothing!’ (Joni, CS2), ‘you think you know everything about HIV, but then you realise that there are so many things that you don’t know’ (Alaia, CS3).

Training is a practice that is considered to help create an inclusive volunteer programme that helps increase diversity among volunteers (Rochester et al., 2010). Following research that suggests such diversity is lacking, particularly in service-delivery volunteering (Mohan, 2011), my study supports the importance of involving diverse voices and experiences within volunteering in terms of creating the potential for transformative learning experiences. The next section examines how the multiple voices and experiences within a charity can be brought together through the practices of training to develop and sustain the shared values of the charity.
10.2.5 Shared values that make knowledge meaningful

As discussed in Chapter 2, a unique, distinguishing factor of the charity and voluntary sector is its ‘values-expressive character’ (Jeavons, 1992). A prominent connection between knowledge and values was identified within the cases because knowledge became meaningful to volunteers when it was directed towards both the values of the charity and their own stance towards the object of activity. Therefore, learning in this environment is not ‘value neutral’ as Stetsenko (2014) describes, and the culturally and historically developed values, such as the value in CS3 that people living with HIV should be free from stigma, are integral to the activity and practices of volunteering within charities. The view of values being integral to learning supports the aim of education in this context as ‘not about acquiring knowledge for the sake of knowing, but a project of becoming a certain kind of a person’ (Vianna and Stetsenko 2014, p.582). Therefore, government policies that regard volunteer training within charities simply as a way of acquiring transferable skills and knowledge neglect the transformative potential and complexity of learning in this environment.

The theory of TAS highlights the vital role of a learner's commitment to their ‘activist pursuits premised on endpoints of social change’ (Vianna and Stetsenko 2014, p.582). This study suggests that charities, such as the ones in the case studies, can offer an environment where the activist pursuits of individuals can be brought together in collaborative activity, and supported and mobilised through practices of training. Volunteers valued these practices because they enabled them to act on the object of activity, which in the cases included stroke, sexual violence and HIV. In particular, these practices strengthened the emotional investment of volunteers in their activist pursuits and shared values of the charity. For example, in CS2, through the dialogic practices of training and the multiple voices involved in these practices, the emotions of volunteers, such as frustration and anger, motivated them in their activity as they imagined acting on the object of sexual violence. Volunteers across the cases were also motivated by the emotions expressed towards other subjects in the activity; as
David in CS1 described, the ‘passion’ of staff, volunteers and service users. The consideration of emotions within learning activity is underexplored in both the theories of expansive learning and TAS, but in wider CHAT literature it has long been considered a vital component of understanding human agency (Nardi, 2005) and how subjects experience the object of activity (Leontyev, 1974). A new understanding of motivation to learn within the charity and voluntary environment was gained through this study by placing theoretical emphasis on the emotions and shared values of volunteers within the practices of training.

Sharing the values of the charity is important for anyone entering into the organisation, including staff and volunteers, as it is these shared values that drive the activity of volunteering forward. Shared values helped to create intersubjectivity that brought volunteers together to work towards the cause of the charity and created a feeling of ‘belonging’. For volunteers, the sharing of these values is the main way in which they are accepted and made a part of the organisation, from within which they can enact their agency. For example, the value volunteers in CS1 and CS2 placed on service users motivated them to engage in training practices. This value also provoked Kayla to assert agency over her own learning in CS3 because she was ‘thinking about the service user and not wanting to mess it up’. Values within charities can become both a cultural tool and a rule to the activity of volunteering, which emphasises the integral position of values within the activity and also offers an example of how volunteers can enact agency over their learning. Furthermore, operationalising the CHAT-informed concept of values in this context intends to contribute a clearer definition of this term within TAS.

In agreement with previous studies (e.g. Rojas-Drummond et al., 2008) dialogic practices were central in developing shared meanings within training and thus intersubjectivity in the activity. To address the break down in intersubjectivity that occurred in the data when volunteers faced contradictions within their volunteering activity, it would be useful to further investigate ways in which dialogic practices could
be incorporated and extended within volunteering activity. Volunteer retention has previously been acknowledged as a challenge for the charity and voluntary sector, and one that can be addressed by volunteer training (O'Higgins, 2013). My findings further this argument by emphasising the need to view training as a continuous, ongoing practice, rather than a one off event in order to sustain motivation and the feeling of belonging. This is an important consideration in terms of creating shared values and working towards a shared object, which are central to the work of charities and volunteers. The concept of intersubjectivity also offers a new lens through which to explore issues of sustaining volunteer motivation, expanding on previous studies into volunteering, such as Taylor et al. (2008), which have drawn upon the concept of division of labour.

A rule of being accepted into the volunteer activity across all cases was the sharing of the values of the charity. The practices of training are a key part of this process as they provide opportunities for dialogue about and the demonstration of these values, which contribute to the creation of a joint, shared motive for the volunteering activity. As Rojas-Drummond et al. (2008, p.321) describe, education in this context involves ‘essentially a communicative process in which participants negotiate personal perspectives in order to construct new shared meanings and understandings’. In particular, training provides an opportunity for focused dialogue and the sharing of scientific concepts (Vygotsky, 1987) regulated by the rules and values of the charity, which is not necessarily available ‘learning on the job’. Therefore, findings challenge the assertion that informal learning is the predominant way in which volunteers learn (Duguid et al., 2013) and agree with previous workplace learning research that have criticised the separation of learning into informal and formal categories (e.g. Billet 2002; Wenger, 1998).

In the study by Engeström (2008) on work teams, values of the organisation were initially introduced to the workers as tools, before being transformed into rules. In my study, the values of the charity were initially rules that then became tools for volunteers
to mediate their activity. Engeström (2008) warned of the risk of ‘concertive control’ when values become rules, however the transformation of values into rules within my case studies enabled the volunteers to work towards their own ‘activist pursuits’ and ‘take a stand on matters of social significance’ (Vianna and Stetsenko 2014, p.581).

However, volunteers must be made aware of the social and historic development behind these values in connection to the object of activity. Engeström (2008, p.190) warns that if values are solely focused on at the expense of the object of activity, this will limit ‘the possibilities of emancipatory development from below in work practices.’ For example, the terminology and vocabulary that were prominent in CS3 require an understanding of why these are so important to the history and cause of the charity and for space and opportunity for reflection and dialogue. Otherwise there is a risk of verbalism, which is ‘a mindless learning of words’ (Vygotsky, 1987, p.105) where there are just ‘empty words’ without action and therefore without the possibility of transformation (Freire, 1970, p.68). This outcome would go against the integral part that wider awareness raising plays in the charity sector because volunteers would be unable to distribute or exchange their knowledge beyond the charity. Possibilities for such emancipatory development outlined by Engeström (2008) were seen in the case studies when the knowledge volunteers learned in training became transformative tools for them to draw upon within and beyond their volunteer roles. For example, Brett in CS3 described how he was ‘able to explain the reason why’ when distributing knowledge on HIV beyond the charity. Therefore, as theorised in TAS, values are an integral aspect of learning in this environment, and rules regulating volunteering activity both protect these values and become mediating tools for volunteers.

10.2.6 Summary

This study has argued that the charity environment, through which volunteers engage in training practices, plays an integral role in their learning that goes beyond being
merely a context or influence. The societal challenge that each charity addresses, how labour is divided to work towards this challenge, the values and rules that regulate this labour and the multiple voices, historicity and positions within the charity, all contribute and interact with the process of learning within this environment. By exploring the learning of volunteers within a charity environment, this study offers a new conceptualisation of training, which involves ongoing dialogic practices aimed towards dynamic societal challenges. By taking into account the historicity, emotions and subjectivities of volunteers and making them conceptually distinct through a CHAT-informed theoretical framework, this study has also shown learning as a whole process, rather than a one-off cognitive event.

From this study, training can be seen as different aspects within the charity environment: as a practice that legitimises the position of volunteers within the division of labour; as a tool that allows volunteers to position themselves within the charity and creates a sense of belonging and connection; and as a rule which volunteers are required to act within. Within the perspective of CHAT, training is an integral moment in the activity of volunteering and thus serves multiple purposes and provides various opportunities for transformation, which will be further explored in the following section. This conceptualisation of training offers a more complex understanding of learning within the charity and voluntary environment than previous studies that have dichotomised learning into formal or informal categories. Furthermore, in an environment where values are central to the activity and practices of the charity, training is more than knowledge acquisition and allows the ‘becoming a certain kind of a person’ (Vianna and Stetsenko 2014, p.582). Drawing on TAS was particularly helpful in understanding the motivations of volunteers to engage in training within the charity environment, where they can develop and work towards ‘meaningful life pursuits’ and an imagined outcome (Stetsenko, 2014). Such motivation and perceived use value is specific to this environment, therefore findings of this study provides a challenge to government policies that assume volunteers can unproblematically apply learning from
charities into the workplace. The next section addresses the potential for transformational learning within the charity environment.

10.3 Transformational learning

RQ2. In what ways can this learning process be described as transformational?

10.3.1 Introduction

This thesis combined the CHAT-informed theories of expansive learning and TAS in order to understand how volunteers learn through the practices of training, according to their values and imagined outcome, and how this allows them to transform the world as well as themselves. This process of transformation, according to both theories, explains change and development. This study aimed to identify when and how the interaction between the charity environment and individual volunteers became transformative in order to increase opportunities for learning within this context.

10.3.2 Questioning and challenging existing practices and perspectives

As outlined in Chapter 4, TAS and expansive learning each explain learning as a dialectical process of transformation. Both theories focus on how, by challenging the ‘status quo’ in collective activity, people can expand their horizons to learn ‘what is not yet there’ (Engeström and Sannino, 2010, p.2) and ‘imagine what does not yet exist’ (Stetsenko, 2014, p.185) in order to create new possibilities and practices. Often the activity of the charity and voluntary sector also involves questioning existing social practices and imagining an improved situation based on their values. Mündel and Schugurensky (2013) argue that learning is the most effective way of working towards this goal of social change and by identifying the ‘struggle’ (Stetsenko, 2012) and contradictions (Engeström, 1987) volunteers experienced in their activity my findings
were able to identify how opportunities for learning emerged from the process of questioning.

The initial stage of questioning was identified across the cases as contradictions emerged through the practices of training, which forced volunteers to question their existing beliefs, practices and previous experiences as well as the wider ‘status quo’ in the world. This personal and wider questioning is slightly different to that described by Engeström (1987), which concentrates on the questioning of the system or the organisation in order to change the system to create a new form of practice or culture. Such a change of the system was not widely identified across the cases, except in CS3 when Brett described addressing the contradiction of staff role versus volunteer role by questioning the existing practices of the charity. This act of questioning led to a change in work practices, and thus created a change to the division of labour for the volunteering activity. The act of questioning in my study was more aligned with the process outlined in TAS with the emphasis on ethics and values (Stetsenko, 2012). In particular, the theme of values was prominent within the findings, and the opportunities that training practices provided for the development of shared values provided an opportunity for both individual and social transformation. As Vianna and Stetsenko (2014) argue, it is the ‘activist stance’ that volunteers take towards these values that positions them as activist learners who can transform themselves and their environment, rather than passive learners merely adapting to their environment. As was expressed by Kayla (CS3) and Stephanie (CS2), the value they placed on the service users of the charity and their stance towards them positioned them as activist learners.

From the findings of this study I also argue that it is the emotional connection of volunteers to the object of volunteering activity which motivated them as ‘activist learners’ (ibid.). Furthermore, imagination formed an integral part of this process as volunteers, through the practices of training, imagined working on the object. Through the imagined outcome of their volunteering activity, which was mediated by their
emotions towards the object, volunteers were motivated to work on the object within and beyond the system of the charity. The role of imagination in ‘challenging the present and stretching beyond the status quo’ (Stetsenko 2014, p.185) also revealed to volunteers possibilities for their own unique contribution to the object (Vianna and Stetsenko, 2011), or what might be described as conscientização or ‘the awakening of critical awareness’ (Freire, 1974, p.15). Therefore, the position of volunteers to enact wider change beyond the charity could address claims regarding the restrictive effect that recent UK government policies have had on charities for campaigning and advocacy, and the general silencing of the sector (Milbourne and Cushman, 2015).

Across all cases, but particularly in CS2, the questioning of the status quo involved volunteers questioning their own beliefs and experiences, when they experienced contradictions between these and their new perspective of the charity cause. In a dialectical sense volunteers are part of the status quo so this personal questioning is an essential part of transforming themselves in order to transform the status quo. Stephanie described this relationship in CS2, when she said that without challenging yourself you are still ‘part of the problem’. Such personal questioning has been under-explored in the theories of expansive learning and TAS, which, as previously mentioned, concentrate on questioning the system and wider society respectively.

However, findings of this study suggest that this kind of personal questioning forms an integral part of learning as a transformational process in the charity and voluntary environment. Furthermore, working on such contradictions enables a transformation of both volunteers and the object of the volunteering activity. The next section further explores the transformative potential for both volunteers and their wider environment through addressing the contradictions in their activity.
10.3.3 Self and social transformation

Exploring opportunities for both individual and social transformation aimed to uncover the meaningful learning experiences taking place within volunteer training in order to gain a better understanding and insight into this learning and how it can be supported. My study showed that, although volunteers may be aware of the cause of the charity before training, it is through the relational and dialogic practices of training that they are able to gain a deeper understanding, and knowledge becomes meaningful, and therefore transformative for them. At the same time they as subjects become meaningful to the charity as they distribute this knowledge and continue dialogic practices within and beyond their volunteering activity. This finding follows the view from Leontyev (1974) and Cole (1996, p.285) that volunteers are not ‘blank slates at the start of instruction’, but as in the study by Maclaren (2015), training provides an opportunity for re-mediation that develops deeper insights and ‘new ways’ of perceiving the world. This concept of re-mediation was useful in my study for highlighting the transformation of these perceptions and previous beliefs. Furthermore, knowledge itself became a transformative tool (Vianna and Stetsenko, 2011) in the process of volunteers distributing it beyond the system as it then enabled further work on the object.

In this study, meaningful learning was identified as learning that was focused towards personally significant goals aimed at changing the status quo (Vianna and Stetsenko, 2011) and occurred through strong connections between new and existing knowledge (Engeström, 1994). This was identified in the case studies as previous knowledge of volunteers was negated by their experiences within training and then sublated into a new form. The thesis positioned the concept of knowledge as a dialectical entity, containing previously separated components, such as formal and informal knowledge, and previous and new knowledge (Roth, 2012). The movement and contradictions involved in this dialectical entity was conceptualised as the process of learning, which is manifested in transformative processes. Conceptualising learning as a dialectical
process of transformation enabled the existing dichotomies of learning in this context to be overcome, and presented learning as an ongoing process of becoming human (Vianna and Stetsenko, 2011). This process was most prominent in CS2 as volunteers described both a negation of their previous knowledge - ‘Oh well I knew nothing!’ (Joni) - and the development of a new perspective on sexual violence. This process did not necessarily result in a change in practice, although some volunteers did discuss things they were doing differently after participating in training, such as refusing ‘to laugh at certain jokes’ (Stephanie, CS2). However, volunteers across all cases expressed a feeling of increased confidence to distribute the knowledge they had learned and the passion they felt for their activity. Rebekah in CS2 described this transformation as feeling ‘really different’, and in CS1 David even described himself as becoming the object, as the ‘face and voice of stroke’. Therefore, as volunteers collaboratively worked towards their activist pursuits within a charity they could be described as becoming unique individuals (Vianna and Stetsenko, 2011).

The concept of transformation was conceptually and analytically useful in understanding the role that learning among volunteers plays in wider awareness raising, which is integral to the activities of many charities. This finding is particularly salient as the potential for wider awareness raising by UK charities is considered to be under threat from recent government policies, such as the UK Transparency of Lobbying, Non-Party Campaigning and Trade Union Administration Act 2014 which is seen as restricting the freedom of charities to engage in political debate (Morris, 2016), and general ‘self-censorship’ over fears of losing funding (Milbourne and Cushman, 2015). My study helped to build on previous research by drawing upon a theoretical framework that conceptualised personal transformation as an integral part of collaborative practice rather than an individual psychological process (Vianna et al., 2014).

Taking into account wider awareness raising also helped to avoid individualising transformation, especially from interview data. In particular, the description by
Stetsenko (2014) of how people transform the world and themselves was reflected in the data when volunteers talked about how they felt the training had contributed to expansive transformations in their own lives and also wider transformations beyond the charity. For example, changes in personal beliefs, practices, careers, and sharing knowledge within their communities. These examples illustrate the potential for both individual and social transformation within volunteer training. The practices of training help to produce motivated volunteers that charities require to both sustain themselves and act to transform the wider environment. Sustaining learning and motivation is crucial for the charity and voluntary sector and is what makes its resource needs distinctive. The next section examines how this need can be met through the expansion of possibilities for both volunteers and charitable organisations.

### 10.3.4 Expanding possibilities for volunteers and the charity

Within the charity environment volunteers described a feeling of freedom to learn ‘without pressure’, which expanded their horizons for new possibilities (Engestrom and Sannino, 2010). These possibilities included: further training opportunities relevant to their volunteer role, as Michael in CS3 participated in; learning opportunities beyond the volunteer role, such as the poetry course within CS1 that Greg took part in; and career development opportunities outside the charity, such as the counselling course Joni signed up to after the CS2 training sessions. These wider activities were personally transformative for volunteers as they opened ‘up new horizons for personal and social growth’ (Vianna and Stetsenko, 2011, p.319). Learning about the challenging, societal causes that each charity addressed involved a change in perspective of this cause for many volunteers in my study. Therefore, training practices could be described as enabling volunteers to formulate and expand the object of their activity (Engeström and Sannino, 2010), which Foot (2002) describes as a developmental process because both subject and object are transformed (Cole, 1996).
The complex and challenging health and social care causes that volunteers in the study were learning about were particularly fruitful in exploring this subject-object dialectic in CHAT and the opportunities it presents for transformation.

A particular tool that mediated this subject-object transformation was personal experiences, which came from the multiple voices within the activity of volunteering and links to both past and future practices (Stetsenko and Arievitch, 2014). For example, volunteers in CS1 drew upon their own and others personal experiences of stroke to gain knowledge they could then distribute, or exchange, in their volunteer role. In CS2 volunteers reflected on their previous beliefs of sexual violence and changed their perspective and practices. In CS3 the joint values of volunteers discussed in training helped to create a new understanding of living with HIV that volunteers were able to enact in their volunteer roles. However, if the object was not transformed for volunteers through practices of training, then, subsequently, they as subjects were not transformed. As CS1 showed, this occurred when volunteers got ‘stuck’ within their personal experiences and felt ‘they know almost everything there is to know about stroke’. This situation could be overcome by following what Vianna et al. (2014) describe as placing the personal experiences of volunteers in a wider societal context. The practices of training within a system that involved multiple voices and opportunities for dialogue provided a space for this wider context and thus enabled volunteers to become activists on, rather than passive ‘undergoers’ of, the cause of the charity (ibid.).

The theory of expansive learning focuses on the expanded possibilities or transformation of the activity and therefore the system, which in my study were the charity organisations. Transformation of the charities was less of a focus in my study as the individual and social transformation described in TAS was more appropriate to my research questions. However, within the dialectical framework of CHAT, as volunteers are transformed they also transform the system as they are mutually constitutive of each other. This can be seen in the histories of the charities in my study, which were
originally set up and developed by volunteers, and the services provided by the
charities, which heavily relied on and were also partly expanded by volunteers.
Therefore, the charity and voluntary environment was particularly suited to explore this
dialectical relationship. The multiple positions volunteers could hold within the system
of the charity, often enabled through participation in training, were also seen as
expanding the possibilities for themselves and for the charity.

Within the findings charities could be described as creating zones of proximal
development for volunteers as they were guided by ‘more able subjects’, including both
staff and volunteers, and given access to mediating cultural tools (Luckin et al. 2003).
In practical terms, charities have to balance their limited resources with supporting
ongoing learning, so could draw upon the volunteers themselves to help support
learning across the charity. The expansion of possibilities for both volunteers and the
charity could be seen particularly in the development of training. Volunteers became
trainers and, as Nadja described in CS2, were able to draw upon their own experience
as a volunteer within training to change how the training was developed. Training was
also viewed as ‘two way process’ (Gillian, CS1) and trainers were able to learn from
volunteers, as Eiliyah described learning from the personal experiences of stroke
survivors in CS1. This mutual expansion provides an understanding of the context of
volunteering, as an individual-social dialectic. Such an understanding increases
knowledge about the organisational and institutional context of volunteering, which is
argued to help overcome the prevalent, but limited, view of volunteering as purely an
‘individual behavior’ (Hustinx et al., 2010).

Findings emphasised the importance of training in a group that enabled dialogue and
the sharing of experiences. The online learning materials for CS1 and CS3 were little
used by the volunteers within this study and the importance of dialogue and
opportunities to develop shared experiences and shared understandings could explain
this lack of use. Across the cases, volunteers spoke about how the training ‘bonded’
them as a ‘group’ and provided a link to the charity when their volunteering activity
takes place outside of it. However, whilst the development of shared values took place through dialogue and sharing experiences within the practices of training, shared values were also created through strict rules and monitoring. The multiple voices that constitute the object were ‘re-orchestrated’ according to the rules and values of each charity. Such monitoring and tight regulation of values, although understandable in terms of the causes the charities are addressing, provokes consideration of how far training is reproducing, rather than transforming, the system (or the charity) and how this allows for change, particularly in light of the dynamic object of activity that is constantly changing. This tension could be addressed by charities bringing these contradictions to the attention of subjects within the volunteering activity in the dialogic practices of training. The next section further explores the potential for transformation and how knowledge created and shared within training practices can be conceptualised as a tool in this process.

10.3.5 Knowledge as a purposeful activity

Findings showed how training practices afforded opportunities for volunteers to gain knowledge about the world and themselves, which was a mutually transformative process. Conceptualising knowledge as a purposeful activity, rather than an outcome, and learning as the process of people working towards this activity (Stetsenko and Arievitch, 2004a) was useful in understanding how the training of volunteers can enable wider awareness raising. Therefore, rather than considering the actions of individuals as being transformative, this study viewed their collectively constructed knowledge as having transformative potential that can be shared beyond the charity. In this way, knowledge was ‘performed and enacted’ (ibid.). Therefore, rather than being a static, fixed entity to be ‘transferred’ from one situation to another, knowledge is itself a transformative tool that is constructed, shaped and shared by volunteers through practices of training.
This finding follows the definition from Stetsenko and Arievitch (2014, p.60) of knowledge as being 'conducted in view of social goals and agendas' rather than being 'detached from issues of real life practice, history, and politics'. Volunteers were motivated to engage in training because it provided them with the access to knowledge that enabled them to actively transform the world through 'a form of active transformative engagement (=meaningful activity)' (ibid.). In other words, they perceived the 'use value' of what they were learning through training practices; a value that they may not perceive in learning in other areas of their lives, such as within educational institutions or the workplace, as in the study by Roberts (2013). As Stetsenko (2014, p.185) argues, this knowledge was not merely situated in the present but involved imagining future needs and what ‘ought to be created and struggled for’. TAS conceptualises knowledge as a transformative tool for learners to develop ‘meaningful life pursuits’, through which they can change their world, gain knowledge of it and ‘become' themselves (Vianna and Stetsenko, 2011). The meaningful activity and meaningful learning that this kind of knowledge allows, provokes the question of how knowledge as a transformative tool can be fostered, supported and promoted within the charity environment. In my study, the development of shared values and adhering to rules were important in enabling volunteers to use this tool to spread awareness beyond the charity, resulting in wider transformation.

Knowledge was therefore made meaningful to volunteers as they took a stance towards the cause of the charity, which afforded them transformative agency (Haapasaaria et al., 2016). As volunteers enacted agency over their learning in accordance with their values, this changed the structure of the volunteering activity through the dialectical relationship, as described by Stetsenko (2007). This occurred as volunteers became 'agents of their own learning' (Haapasaaria et al., 2016, p.236), and also when volunteers encountered contradictions within their volunteer role as in CS3. This idea builds on the previous existing literature on volunteer motivation, but goes beyond the motivation of individuals being internally driven and separate from their
surrounding environment. Instead, agency is conceptualised as ‘a form of active engagement of individuals with their world’ (Stetsenko, 2007, p.111) and this study has shown how charities provide a space, or ‘collective instrument’ (Engeström, 1991, p.256), for such active engagement and the opportunity for the engagement of individuals ‘in ways that allow for them to be truly agentive participants who are welcome to make a contribution to social life’ (Stetsenko, 2007, p.112). In this way, the processes of learning can be seen as the formation of agency (Engeström and Sannino, 2012). This finding also contributes to theory development, by addressing the call from Engeström and Sannino (2010) to ‘characterize empirically the new forms of agency involved in expansive processes’, and the criticism that aspects of power and agency are neglected in the theory of expansive learning (Avis, 2009). Similarly, the finding aims to contribute to the existing research in the area of CHAT, which is well recognised for providing insight into ‘not only what people are doing, but also why they are doing it’ (Kaptelinin, 2005, p.5).

10.3.6 Summary

This study has drawn upon the CHAT-informed theories of expansive learning and TAS to conceptualise the learning of volunteers who are being trained to perform service-providing roles as a process of transformation. Findings identified this transformation as personal, systemic and social as volunteers, the charity and their wider community were transformed. While it is important to note that learning within volunteer training will not necessarily be transformative, this thesis has argued that charities offer a unique environment that offers much transformative potential.

Conceptualising the process of learning as a form of transformation was useful in this study to understand learning in the charity and voluntary environment, where challenging societal issues are learned about and addressed. In particular for the health and social care charities in my study, these are issues that are dynamic and that
have no set ‘answer’, meaning that volunteers have to learn ‘what is not yet there’ (Engeström and Sannino, 2010, p.2) and imagine ‘what does not yet exist’ (Stetsenko, 2014, p.185). The dialogic process of questioning and challenging existing practices, which is already viewed as central to the activity of charities, was conceptualised as being an integral part of this transformative process. Through practices of training and the interaction of their own and others’ historicity, volunteers were able to develop an ‘activist stance’ (ibid.) towards the object of volunteering activity, which both motivated them and enabled them to enact their agency within the activity.

As was outlined at the beginning of this thesis, transformation within this theoretical perspective does not aim to describe a process of change from one static state to another. Rather, transformation encompasses a continuous, ongoing process where people actively transform the world through collaborative activity and shared values, and in the process transform themselves (Stetsenko, 2014). The study argues that learning in the charity and voluntary environment is therefore not easily understood through measuring what volunteers ‘know’ after completing training tasks, but that it can be better understood as an ongoing process of transformation, where existing knowledge is sublated into new forms of knowledge, which changes individuals, the collective group and their wider environment. The charity is therefore conceptualised as a ‘collective instrument’ (Engeström, 1991), which provides zones of proximal development through which volunteers perform and enact knowledge. This knowledge, which is imbued with the values of the charity, then becomes a transformative tool used in working towards the activist pursuits of volunteers within and beyond the charity (Vianna and Stetsenko, 2011).

It is hoped that providing a deeper insight into such learning experiences will also be useful in other situations where challenging topics are learned about, both in the workplace and in educational institutions. Furthermore, by exploring how the societal challenges that volunteers were working towards can be expanded beyond the charity, the research intends to increase understanding of and opportunities for wider
awareness raising. This chapter has so far addressed the specific research questions of the study. The final sections offer further reflections and possibilities for future research on the findings that have answered these questions, concentrating on the areas of contradictions, emotion and imagination.

10.4 Further reflections

10.4.1 Introduction

This chapter has so far discussed the findings in light of the research questions posed in Chapter 1. This final section offers wider reflection on two main areas identified from researching the charity and voluntary environment through the lens of the theoretical framework. These areas include firstly, the concept of contradictions and how practices of training draw these to the attention of volunteers. Secondly, the integral role of emotion and imagination as mediating tools for learning. Possibilities for future research within both areas will also be outlined.

10.4.2 Training as a practice that brings attention to contradictions

This thesis began by outlining the gap in knowledge regarding the learning of volunteers, which has so far been conceptualised as a measurable outcome from training tasks, or an unguided process of learning performing the volunteer role. My study aimed to overcome this dichotomy by conceptualising training as an integral and ongoing practice of the volunteering activity. Focusing on training practices identified that it was through these practices that volunteers were confronted with and were able to address the contradictions emerging within the volunteering activity. The concept of contradictions is fundamental to CHAT and was drawn upon in my study as an analytical tool to identify possibilities for transformation in the data. The concept of contradictions has been drawn upon in studies on expansive learning that follow an
interventionist approach, most notably the Change Laboratory method. This method is described as ‘a tool for transforming work’ (Engeström et al., 1996) and uses contradictions in an interventionist way to provoke participants into questioning and ultimately changing the system, which is usually an organisation.

In my study, rather than myself as a researcher creating an intervention, training practices themselves appeared as a form of intervention. These practices provoked volunteers to question the ‘status quo’ as well as their own stance towards the charity cause, for example the existing myths and stigma around people living with HIV. Training as a form of intervention also had a different focus. The Change Laboratory method intends to bring to attention present problems within an organisation and develop new practices to overcome these problems (ibid.). Training within my case studies intended to bring attention to problems beyond the charity, in the world, and foster practices to help volunteers address these problems through the aim and vision of the charity.

Furthermore, rather than a questioning of the system as in the Change Laboratory method, training practices provided opportunities for dialogue that provoked a questioning of personal beliefs and practices as well as a wider questioning of beliefs and practices in the world. For example, beliefs about who is affected by stroke, blame surrounding sexual violence and judgements of people living with HIV. As in the Change Laboratory method where the agency of subjects to shape their learning is an important outcome (Sannino, 2011), the agency of volunteers is also a fundamental aspect of their activity. Within volunteer training practices learners could be described as ‘activists’ committed to social change, which meant that they were actively working on their own unique goals of changing the world and imagining a different future to the present (Stetsenko, 2014).

The agency of volunteers over their learning in the charity environment came across more strongly in the data than I had originally anticipated and involved many contradictions. For example, on one hand, the volunteers trusted the knowledge
accessed through the charity and the rules regulating the volunteer activity, which meant they did not ‘have to think about it’ and that took away ‘having a dilemma about how you respond’ (Terry, CS2). On the other hand, volunteers like Kayla in CS3 sought to assert their agency when they felt their learning needs were not being met within the charity, by seeking further learning opportunities. There is also a fundamental contradiction in the position of volunteers as they have complete agency over their decision to volunteer within the charity, which sets them apart from paid workers in a position where volunteers such as David saw himself as unable to be ‘sacked’. However, their agency is also restricted by their volunteer position. For example, if they do not share the values of the charity, for which they actually can be ‘sacked’ as in CS3, or where information is seen as being withheld from them, as in CS1. The consideration of agency has previously been criticised within expansive learning for being unaccounted for (e.g. Avis, 2009), therefore findings from my study are intended to contribute to this theoretical gap.

The aim of my study was not to highlight problems within charities, but to explore learning within this environment, particularly learning around complex, challenging societal challenges. These challenges could be described as societal contradictions (Stetsenko, 2007) involving what Engeström (2008) has described as runaway objects, which are global concerns such as climate change. Rather than changing the system of an organisation, the aim of addressing these contradictions is to change the world as Stetsenko describes in TAS and my study also showed how this was an aim of training practices within charities. However, as outlined by CHAT, contradictions did emerge within the system (or the charity) as volunteers addressed these societal challenges from their unique positions within the collaborative volunteering activity. For example, there was a contradiction across the cases between the amateur position of volunteers and the professional service they were expected to provide. These systematic contradictions afforded both expansive and destructive transformation, as they could paralyse the activity of volunteers but also motivate learning. In the data this was most
clearly shown through the experiences of stroke volunteers in CS1 who were trained to take blood pressures from the general public. Volunteers were able to overcome such contradictions through participating in the ongoing learning opportunities supported by the charity. However, they needed to have the agency to be able to participate in these opportunities, which could be restricted.

Allowing the opportunity to address these contradictions through the practices of training may increase opportunities within volunteering activity for ‘qualitatively new modes of work activity’ (Engeström and Sannino, 2010). More widely, bringing these contradictions to the attention of charities through a Change Laboratory approach could provide a useful way of addressing the challenges for charities of responding to changes in volunteering, government policies, funding concerns and the expectations of volunteers. For example, the Change Laboratory study on the Finnish Postal Services (Engeström et al., 1996) aimed to redesign the work of mail carriers to respond to wider organisational challenges, such as competition from private companies and a threat of job losses.

In summary, training as a practice can draw attention to the numerous contradictions within societal challenges and how charities and volunteers address them. This practice includes encouraging the questioning of such contradictions through incorporating the multiple voices of people affected by these challenges and supporting discussion around these challenges. These societal challenges could be described as runaway objects, which generated both controversy and new possibilities for development and well-being (Engeström, 2008) as both volunteers and their wider environments were transformed through training practices. However, systemic contradictions within the charity itself, such as the amateur-professional contradiction within the division of labour, which could also lead to new possibilities, remained unexplored. Exploring these contradictions could provide a more transformative experience through training for both the volunteers and the charity and lead to new ideas, tools and practices to help work on complex health and social challenges. The
next section discusses how, through practices of training, the emotions and imagination of volunteers become transformative tools to mediate their activity working towards these health and social challenges.

10.4.3 Emotion and imagination as transformative tools

The ‘emotional investment’ that volunteers have in their activity has been discussed in previous literature as a motivating force for volunteering (e.g. Danson, 2003 in Rochester et al. 2010). My research also showed the important role emotion plays within volunteering and has contributed to this literature by positioning emotion as an essential mediating tool for learning. This was illustrated particularly in CS1, where an emotional connection to the object of stroke was described as being worth ‘a thousand hours of lectures’. The incorporation of the passions and desires behind objects of activity has been considered as missing from research on collaborative activity (Nardi, 2005; Roth, 2007a) and my study also intends to contribute to this gap. The challenging, societal causes that each charity and their volunteering activity were addressing in the study were filled with emotion as the data reflected. This was particularly the case for volunteers who had personal experience of the cause for which they were volunteering. As Vygotsky (1987) argues, affect and intellect cannot be separated and this is particularly relevant when learning about complex societal challenges such as sexual violence and HIV. Findings support the argument of Roth (2007a) that workplace-related cognition cannot be studied without taking into account the mediating role of emotions on motivation.

Furthermore, the study showed the ways in which emotions can be drawn upon as transformative tools to mediate individual and collective learning. These tools include emotions imbued in personal experiences linked to subject historicity as in CS1 and emotions felt in relation to the imagined outcome of the activity, as in CS2. At times these emotions could be overwhelming for the volunteers in the study as the imagined
outcome seemed unobtainable: ‘we - can’t – solve – this [emphasised]. To any passable degree […] There’s no kind of solution’ (Shauna, CS2). The emotional strain on volunteers learning about challenging topics has been previously recognised (e.g. Hutchison and Quartaro, 1993), although, as Roth (2007a) describes, in these studies emotions have tended to be conceptualised as a negative external influence on cognition. Drawing upon CHAT enabled emotion and imagination in this study to be positioned as integral aspects of the volunteering activity. Therefore, the emotions of volunteers motivate them in their activity, but the activity itself also impacts on their emotions in a dialectical relationship, meaning that emotions are ‘continuously produced and reproduced in practical activity’ (ibid., p.46). The idea of ‘positive emotional valence’ as a motivating force (ibid.) is of particular relevance to volunteering, where people give up their time to work for free for a cause they believe in, along with their own individual goals.

In my study, emotions reflected the perceived progress of volunteers of the imagined outcome of their activity (Roth and Radford, 2011). This was particularly highlighted in CS2, where the emotions of volunteers seemed to be directed at the imagined outcome of acting on the object of sexual violence. For example, emotions of frustration and anger about rape and the criminal justice system further motivated volunteers in their activity. Much previous research has been conducted into the motivation of volunteers, however my study has revealed further insights by drawing upon the CHAT-informed concept of the object of activity, which includes both the material object and the imagined outcome. This imagined outcome was identified as being a powerful motivating tool for volunteers across the cases, particularly because the volunteers in the cases could not always see the outcome of their activity, as the stroke volunteers described in CS1. Imagining a different outcome to the current situation is also the first stage in both expansive learning and TAS. The study highlighted the contradictions that occurred as volunteers imagined themselves acting on the object, which were manifest in emotions such as feeling ‘terrified’ (CS2), ‘like oh my God what are they going to say
to me’ (CS3) and being able to do things ‘that at one time I would never have thought of doing’ (CS1). However, through imagining the outcome of their volunteering activity, volunteers were able to overcome and draw upon these emotions within the practices of training, as well as distribute them beyond the charity as Keith described in CS1.

In TAS and expansive learning the emotions involved in imagining the outcome of activity are under-explored, despite emotions being conceptualised by Vygotsky (2004) as a key aspect of imagination. On the other hand, emotions have been discussed as a motivating force in volunteer activity, but the imagination involved in these emotions has had little consideration. My findings show that both emotion and imagination can become transformative tools for volunteers in their learning to enable individual and social transformation. Further research in this area could contribute to the work of González Ray (2014) who is extending the concept of perzhivanie or ‘emotional experience’ from Vygotsky (1994), which encompasses emotion, imagination and motivation in a cognitive-emotional unit.

10.4.4 Summary

The final section of this chapter aimed to provide further reflection on findings from my study that outline two potential areas for further research. The potential for training as a practice to bring attention to contradictions was outlined and similarities were drawn with the interventionist method of the Change Laboratory (Engeström et al., 1996). My study showed how volunteers were confronted with contradictions relating to the cause of the charity through training practices, which provided opportunities for dialogue that provoked a questioning of personal and social beliefs and practices. However, contradictions within the system of the charity that could limit the potential for transformation, were unexplored. Further research could involve bringing these contradictions to the attention of subjects within the charity, as in the Change
Laboratory method, so they can be addressed and ‘new modes of work activity’ created (Engeström and Sannino, 2010).

The role of emotion and imagination in the volunteering activity was also discussed, which were prominent aspects in learning about complex societal challenges. These aspects became transformative tools that both motivated and mediated learning for volunteers. Conceptualising the motivating force of volunteering as the object of activity increased understanding of how volunteers work towards an imagined outcome. This finding intends to explain how emotion and imagination form a dialectical relationship that motivates volunteers in continued learning around challenging topics and provides a foundation for further research in this area.

11. Conclusions

11.1 Contribution to knowledge

11.1.1 Overview

This thesis began by setting out the aim of the study, which was to examine the role of the charity environment on the learning of volunteers, and specifically to explore how their position within the charity, as well as their personal histories, interacts with this environment through the practices of training. Chapter 2 presented the area of volunteer learning within training as under-researched and under-theorised, with existing studies tending to concentrate on either evaluation of training tasks or unguided learning on the job. A similar dichotomous approach to learning was also identified in wider educational research, which Sfard (1998) termed as the knowledge acquisition versus participation in practices metaphor. Foregrounding the research problem in an area of wider educational concern aimed to broaden applicability of the findings.
In Chapter 3 the perspective of CHAT was presented as a theory rooted in Hegelian dialectics that could help overcome such a limited dichotomous view of learning and increase understanding of learning in the charity and voluntary environment. At the same time, this environment was presented as offering particular opportunities to further develop certain aspects of CHAT, such as emotion and agency. The CHAT-informed theories of expansive learning and TAS were presented in Chapter 4 as conceptualising the interaction between a volunteer and the charity environment as a form of expansive (Engeström, 1987) and transformative (Stetsenko, 2008) learning. Expansive learning was useful in identifying how the charity cause, or object of activity, and the charity were transformed through addressing contradictions, creating new possibilities and expanding the horizons of volunteers. TAS was useful in identifying how volunteers became activist learners through constructing and gaining knowledge in training, which transformed themselves and their environment. Chapter 5 outlined the main concepts from these theories that formed the theoretical underpinning of the study.

Chapter 6 explained how the empirical data for the study was generated and analysed through the CHAT-informed theoretical framework. A multiple case study of three health and social care charities, which included volunteers being trained to support people using the charity’s services and who were addressing complex health and social care causes, was argued to provide the opportunity to deepen understanding of learning within this context. In particular, exploring how volunteers learn, and stay motivated to learn, about these complex health and social causes intended to contribute to the volunteering literature on sustaining motivation and avoiding burnout (e.g. Musick and Wilson, 2008). Conceptualising these health and social causes as the object of volunteering activity in each case also intended to contribute to increasing understanding of the object, which has been called for within the CHAT literature (e.g. Kaptelinin and Miettinen, 2005), particularly regarding the emotional aspect of the object (e.g. Edwards and Daniels, 2012). This chapter acknowledged that the
purposive sample could result in recruiting volunteers who had particularly strong ideas or certain experiences of training within each charity. This limitation was addressed through using multiple methods of interviews, focus groups and observations, which also included multiple perspectives, which was integral to the ontology and epistemology of the research. The analytical process of abduction was outlined as an approach that allowed for the incorporation of a theoretical framework, but in a way that rigorously tested it. Overall, the final codes and themes created through this process remained largely informed by CHAT, however abduction helped to identify aspects in the data that I had not anticipated to be so prominent, such as imagination and agency.

Findings were presented in Chapters 8 and 9, firstly through within-case analyses and then through a cross-case analysis. When interpreted through the theoretical framework, learning in this environment was identified as a transformational process, with the charity environment and practices of training playing a mediating role. Chapter 10 addressed the research questions of the study and firstly focused on the role of the charity environment on the process of learning for volunteers being trained for service-providing roles. This environment involved learning about complex and dynamic societal challenges, which required ongoing learning. The prominence of values within this environment was highlighted as being central to the knowledge created and learned by volunteers and enabled them to work towards their own activist pursuits and the shared object of the charity. The dialogic practices of training and the multiple voices involved in these practices created tools for learning and increased shared understandings and motivation for the volunteering activity. Learning as a process of personal, systemic and social transformation was explained to occur as training encouraged volunteers to question the status quo, including their own beliefs and practices, and work towards an imagined outcome. In particular, knowledge imbued with the values and regulated by the rules of the charity, became a transformative tool for volunteers to work towards their activist pursuits and the shared object of activity.
within and beyond the charity. The following sections summarises the contribution to knowledge made by the study findings.

11.1.2 Learning in volunteer training

Findings showed that training provided an opportunity for the sharing of scientific concepts, including their social and cultural development, and focused dialogue around these concepts. This finding challenges previous studies that claim informal learning is the predominant way in which volunteers learn (e.g. Duguid et al., 2013) and follows workplace learning researches that have challenged the separation of learning into informal and formal categories (e.g. Billet, 2002; Wenger, 1998). Studying the ways in which volunteers learned about these concepts aimed to contribute to knowledge on how ‘runaway objects’ (Engeström, 2008) are worked on and addressed and has outlined the suitability of the charity and voluntary environment to examine such objects. By drawing upon CHAT to examine the role of the charity environment, a new way of exploring and conceptualising learning within the training of volunteers was proposed that moves beyond evaluation and informal learning.

The theories of expansive learning and TAS helped to explore the ways in which learning within the voluntary and charity environment can be described as transformational. In particular, the act of questioning the status quo was identified across the cases as being the first stage of transformation for volunteers and their environment. Training provided the opportunity for such questioning through dialogic practices, as well as the opportunity to develop shared values, which led to both individual and social transformation. Following the process of expansive learning, as volunteers were transformed through training practices they also transformed the charity they were volunteering within, as possibilities for its activity were expanded. Examining this mutual process of transformation contributes to the gap identified in volunteering literature that conceptualises volunteering as an individual behaviour and
neglects the social context (e.g. Hustinx et al., 2010). However, strict rules and monitoring practices within training could prevent the transformation of the charity environment and it was recommended that contradictions within this area be brought to the attention of subjects within the system, following the Change Laboratory methodology (Engeström et al., 1996).

Wider transformation in the forms of personal development and awareness raising was identified across the cases as the object of volunteering activity was reconceptualised for volunteers. In this process, the emotions and imagination of volunteers played a central role and personal experiences and knowledge became transformative tools. Overall, conceptualising learning as a dialectical process of transformation enabled the existing dichotomous approach to learning in this context to be overcome, and presented learning as an ongoing process of ‘becoming human’ (Stetsenko, 2012). Conceptualising knowledge as both a dialectical entity and a transformative tool directed at an imagined outcome also challenges the view of knowledge as a static, transferable outcome.

Training as an integral and ongoing practice of the volunteering activity was identified as a form of intervention that encouraged the personal and social questioning of the status quo by highlighting contradictions regarding the cause of the charity. However, contradictions within the system of the charity, such as the amateur-professional contradiction within the division of labour, were left unexplored. Emotion and imagination were also discussed as important mediators of learning in the charity and voluntary environment. Findings of the study move beyond merely exploring learning within a context and draws upon CHAT to conceptualise learning as a process of interaction between the individual and their environment (Vygotsky, 1994). The environment is an integral mediator for learning and this is particularly important in the context of the charity environment as volunteers come from diverse backgrounds, often with personal experiences of the cause of the charity. Gaining an insight into the
learning experiences of volunteers aimed to increase understanding of how learning can be supported within this context.

By problematising the concepts of knowledge and learning in volunteer training the study was able to challenge assumptions and open up enquiry into this area (Alvesson and Sandberg, 2011). This process provided a new conceptualisation of training within the context of volunteering as a relational, continuous and dynamic process with the potential for transformation. The case studies revealed how people learn about complex societal challenges and how this can be transformational for individual volunteers and the charity. Findings suggest that learning in this context is a continuous process that follows the description from Vianna and Stetsenko (2011) of becoming, as the existing knowledge and experiences of volunteers were sublated into new knowledge, which afforded new possibilities. This dialectical process of becoming explains a learning process that goes beyond separations of ‘participation/acquisition’, ‘formal/informal’ learning, and places equal attention on both the development of the volunteers and the cause they are working towards, as well as the surrounding environment. The study has also offered a more complex conception of motivation, which is a much-researched area in volunteering literature, through operationalising the dialectical concept of the object in CHAT.

This study chose to look specifically at the learning of volunteers, rather than paid staff. The argument was made that the status of volunteers, conceptually and practically, was a key differentiating factor to previous research. This study has shown that the positioning of subjects within the activity of volunteering through the division of labour has a fundamental impact on their access to knowledge, participation in practices and, therefore, the potential for transformation. Dialogue around the values of the charity can be transformative for volunteers and their wider communities, as it is through understanding these values they begin to question their own beliefs and practices. However, such dialogue is not necessarily transformative for the charity itself, which strongly protects its values. Whilst this finding challenges the notion that volunteers are
able to transform the environment of the charity, the histories of all charities in the study show such transformation is possible as without motivated volunteers the charities would not exist.

The study did not aim to be prescriptive and claim a ‘best way’ of training volunteers, neither did it intend to identify a ‘cause’ and ‘effect’ of learning. However, identifying what affords expansive transformation in volunteer training does intend to help charities consider their own environments for training. The data indicated that volunteers were learning continuously so there was no set end point of training. Instead training was more an ongoing process of becoming a volunteer, which was identified in the data through emotions. Therefore, knowledge concerning how to support this kind of ongoing learning provides valuable practical implications for charities. Additionally, this thesis has started a dialogue between CHAT and the charity and voluntary sector, which allowed the exploration of areas where further research into CHAT has been called for, including transformation, emotion and agency. The next section of this chapter outlines how this dialogue could be continued and will suggest possibilities for further research.

### 11.1.3 Renewing and advancing CHAT

This thesis began by arguing that CHAT, and specifically the theories of expansive learning and TAS, offers a useful framework to explore learning within volunteer training. The study drew upon concepts from these theories as analytical tools, which helped to capture ‘what is going on’ (Morse and Field, 1995) in order to increase understanding of how learning can be supported in this environment. In particular, drawing upon a theory rooted in dialectics enabled an understanding of learning as a process of transformation that goes beyond separations of ‘participation/acquisition’ and ‘formal/informal’ learning, and as dynamic activity rather than ‘a transition between two static states’ (Roth and Radford, 2011, p.8). This understanding places equal
attention on both subject and object development, or the development of volunteers and the cause they were working towards within the charity. Therefore, during both data generation and analysis the CHAT-informed theoretical framework sensitised me to certain aspects within the data, such as the transformation of volunteers and their wider environment.

CHAT was drawn upon in this study to conceptualise volunteering as an activity taking place within the system of a charity, and training as a series of practices created within and sustained by the activity. This distinction was important as training took many forms and was an integral part of the volunteering activity, and it also informed what Stake (1995) describes as the boundaries of each case study. Initially I had anticipated that the case would be the group of specific volunteers in the training sessions I planned to observe. However, once I started observing training it became clear that this would be too narrow and particularly for CS1 and CS3 these groups were constantly changing. Therefore each case was defined as the wider group of volunteers who were involved in training to deliver services within the charity. This context was useful to further understanding of the individual subject within a collective activity, as called for by previous CHAT research (e.g. Daniels and Warmington, 2007).

Drawing upon the aspects of an activity system within CHAT proved useful for taking into account the voluntary and charity environment and identifying aspects that afforded, and also constrained, learning within this context. Central to the theoretical framework was the conceptualisation of the cause addressed by each health and social care charity as the object of activity. The complex concept of the object, including its history and dynamism, was drawn upon to problematise the societal challenge, including stroke, sexual violence and HIV, volunteers were learning about. This conceptualisation also increased understanding of the motivating force for learning in this context as well as ‘the horizon of possible actions’ (Engeström, 1995). The concept of the object enabled volunteers to be positioned as ‘learners as activists’ with the
motivation and potential to change themselves and their environment, rather than passive receivers of information adapting to their environment (Stetsenko, 2014).

Taking into account the dual meaning of object as material and ideal was also useful in considering the role of imagination in training practices, and how this contributes to volunteer motivation. The description of objects that are global concerns as ‘runaway objects’ was drawn upon in this study because this definition was relevant to the dynamic causes the charities were addressing. Although using this term did not create any specific methodological or analytical differences to using the general, but still complex, term ‘object’, this study hopes to contribute to existing research on learning about and addressing global threats and possibilities (Engeström and Sannino, 2010). Exploring ‘runaway objects’ intends to contribute to previous studies which have argued that objects addressing wider societal needs have the potential to challenge and develop the theory and practice of expansive learning (e.g. Engeström, 2015; Engeström and Sannino, 2016).

Furthermore, conceptualising the cause of the charity as the object of the volunteering activity helped to avoid positioning the cause as something isolated and static, and position it as an integral, dynamic part of the volunteers and the charity. It also allowed the incorporation of the cultural and historical development of the volunteering activity, which has been criticised as being absent from previous volunteering studies (Chambré, 1991). The concept of contradictions was particularly useful in analysis in helping to identify opportunities for and barriers to learning for volunteers. However, previous studies on expansive learning have used the concept of contradictions to identify and purposely address specific problems within the system. This was not the aim of my study, which drew upon this concept to identify existing opportunities for transformation within the system and was not methodologically interventionist. Instead, my study drew upon expansive learning and TAS to explore the unique position of volunteers and their stance towards the object within the system of the charity, and how the interaction between them can lead to individual and social transformation.
As outlined in Chapter 5, drawing on theory in this thesis intended to increase the usefulness of the findings, both for volunteering literature and theory development. The analytic process of abduction was useful to prevent the theoretical framework from becoming restrictive and to incorporate new ideas, which also contributed to theory development. For example, examining the practices of training within this environment showed how shared values are created through dialogue in collaborative activity. The concept of intersubjectivity also helped to present a concept of boundaries that involves holding multiple positions within the system, rather than moving across boundaries. This concept appears to be very relevant to the dynamic and fluid environment of charities, in contrast to the more rigid structures of educational institutions and workplaces.

Overall the theoretical framework of CHAT, and specifically the theories of expansive learning and TAS, provided a useful lens to explore learning within the context of the voluntary and charity environment. Drawing upon both theories enabled the research to go further than describing the structures of volunteer training and captured its dynamism (Roth and Radford, 2011). In turn, this environment brought out particular aspects within the theory, such as the mediating tools of personal experiences, values and emotion. As was set out in Chapter 1, this study is in line with previous CHAT research that has shown that ‘every kind of work requires complex thinking, problem solving, and learning’ (Engeström and Glăveanu, 2012, p.151). Identifying the potential for transformative and expansive learning in the charity and voluntary environment has also offered a challenge to the ‘conventional theoretical assumptions about learning and knowing’ as outlined by Lave (2012, p.161).

As was outlined in Chapters 3 and 4, CHAT is a complex theory with a long history of development. Therefore, scope to explore other theories within this thesis was limited. However, other theoretical frameworks could also offer further insights into learning within this environment. In particular, the work of Bakhtin (1984) on multivoicedness and dialogism, and Holland et al. (1998) on positioning and imagination could be drawn
upon to further explore some of the main findings of this thesis. The work of Freire, which Stetsenko (2008) draws upon in her development of TAS, could also be an appropriate lens to further the findings of this study, particularly his work on conscientização. The next section highlights other opportunities for further research.

11.2 Further research

This thesis addressed two specific research questions relating to the conceptualisation of learning within volunteer training in UK health and social care charities. Whilst the answers to these questions have been worked towards and set out throughout the thesis, findings have also led to further questions and possibilities for future research. These possibilities will be outlined in this final section.

The choice of a multiple case study methodology was explained and justified in Chapter 6 and exploring findings across three charities provided a useful synthesis and highlighted interesting nuances. It was acknowledged that the charity and voluntary sector is not homogenous, and further research could focus on the wider voluntary and community-based organisations that illustrate the diversity and complexity of the sector, but that are not registered charities (Milbourne, 2013). Researching into three organisations limited the available time spent within each organisation. Further research could focus on one charity organisation in more detail, following ethnographic studies in the CHAT tradition that enable prolonged engagement in the activity setting (Yamagata-Lynch, 2010). This increased temporal dimension is argued to show the ‘change over time in individuals, groups, and the activities in which they interact’ (Cole, 2010, p.364).

Furthermore, a more detailed account of one charity with a limited number of individuals could provide opportunities to investigate issues of identity, that have not been the focus of this thesis, but that have been studied previously within a CHAT framework, including concepts of personhood (Stetsenko, 2012) and leading identities.
Dialogue emerged from the findings as an integral process in the formulation and instantiation of the object in each case and therefore the learning of volunteers. This dialogic process could be explored in further studies drawing upon specific analysis methods that have been used in CHAT-informed interventionist studies, such as conversation analysis or discourse analysis (e.g. Engeström, Engeström and Kerosuo, 2003).

Findings in this study highlight the contradictions within the division of labour in charities, most prominently the position of volunteers as ‘amateurs’ who are expected to provide a ‘professional’ service. This contradiction could be explored in more detail, addressing the wider criticisms that volunteering is being used by the UK government to replace public services and make up for welfare cuts (Dominelli, 2016), with service-providing charities providing a ‘volunteer-led welfare safety-net’ (Milbourne and Cushman, 2015). The Marxist concept of use and exchange value, which has been drawn upon to a certain extent in this study, could provide a useful analytical concept to further understanding into this area. As well as addressing the policy and practice criticisms by Dominelli (2016), further research in this area could also go towards addressing theoretical criticisms of expansive learning. For example, the criticism that expansive learning interventions ultimately transform organisations to fit in with the current capitalist system, rather than achieving wider social and political change, and that the political implications of contradiction between use and exchange value have been under explored (Avis, 2009). Chapter 10 outlined the possibilities of examining these kinds of contradictions through an interventionist methodology like the Change Laboratory (Engeström et al., 1996).

None of the charities in my case studies formally assessed their volunteers, so there were no tests or examinations that volunteers needed to complete before they could begin their volunteering activity. However, the conceptualisation of learning that this thesis has presented poses a challenge to organisations such as charities that do have to provide evidence of learning to their funders or conduct formal assessments before
volunteers can perform service-providing roles. Although fully addressing this challenge was outside the scope of this thesis, it is hoped that by providing a more complex conceptualisation of knowledge and learning, and investigating the many aspects that are an integral part of these concepts, findings can contribute to research that has called for a greater understanding of what is evaluated at formal assessments like examinations, particularly within educational institutions (e.g. Kvale, 1996b). It also supports the challenges posed to government funding requirements to charities that follow a system of ‘payment by results’, which is argued to result in a discouragement of innovative developments and a detrimental impact on service quality and beneficiaries (Milbourne and Cushman, 2015).

Following the idea of a ZPD, my findings show that it is not the existing knowledge of volunteers that should be ‘measured’, but rather attention needs to be paid to the potential for and the possibilities of their learning. Knowledge in this thesis has been presented as a process, rather than a product (Stetsenko and Arievitch, 2004a), that is understood through ‘long-term studies of change’, rather than ‘knowledge assessments at distinct points’ (Roth, 2012). These considerations of a wider approach to assessing learning from the new perspective of the charity and voluntary sector aim to contribute to existing research in educational institutions on this topic (e.g. Kvale, 1996b; Kontopodis, Wulf and Fichtner, 2011).

11.3 Summary

This chapter has concluded the study by outlining how the aim of the research was met and the contribution to knowledge made through the findings. The study provides a new conceptualisation of learning within volunteer training practices as a relational, continuous and dynamic process with the potential for transformation, where the aim is not simply about ‘acquiring knowledge’, but is more concerned with ‘becoming a certain kind of a person’ (Vianna and Stetsenko, 2014, p.582). The study contributes to
previous research by providing a deeper understanding of the learning of volunteers who are trained within health and social care charities to perform service-providing roles.

The CHAT-informed theories of expansive learning and TAS were drawn upon to address previous dichotomised approaches to learning within this environment and findings also aim to contribute to wider educational research. Through the lens of this theoretical framework a more complex conceptualisation of motivation was presented that aims to increase understanding of motivating and sustaining motivation on learning around challenging topics. This finding intends to be useful for the charity and voluntary sector, as well as wider educational contexts. Furthermore, the dialogic practices of training, which were regulated by values and rules and involve multiple voices, were identified to provide an opportunity for the learning of both scientific knowledge and everyday experiences, which became transformative tools for the activity of volunteers both within and beyond the charity. Further research recommended following the interventionist method of the Change Laboratory to further explore contradictions that emerged within the activity systems of the charities.

Bringing the theories of expansive learning and TAS together in a context that has so far been little explored within CHAT aimed to contribute to theory development. In particular, the context of people volunteering to work on challenging health and social causes provided the opportunity to examine runaway objects which, Engeström (2015) argued, have the potential to challenge and develop the theory and practice of expansive learning. Exploring these objects in my study furthers understanding of the agency of learners, the potential for volunteers to become ‘activist learners’ and the role of imagination and emotion on expanding possibilities for learning in this context. The theoretical framework drawn upon in this study also provides a way to account for the cultural and historical development of both the charity and its cause, which has been neglected in previous volunteering studies (Chambré, 1991). Certain aspects of the findings, such as the emphasis on dialogue and positioning of subjects, could be
expanded and further explored through other theoretical perspectives, such as the work of Bakhtin (1984) or Holland et al. (1998). Future research could also include ethnographic studies concentrating on one situation in detail, including more informal modes of volunteering, and analysis methods that focus specifically on dialogue.

In summary, this study has shown how learning through training practices in UK health and social care charities can become transformative and expansive for both volunteers and their wider environments. Findings have provided implications for policy and practice, as well as for the theoretical development of CHAT.
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282


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283


Appendices

Appendix 1: Case study protocol

Outline of the case study protocol (from Yin, 2009, p.81)

Overview of the case study project

This project aims to examine the role of the charity environment on the learning of volunteers, and it specifically aims to explore how their position within a charity, as well as their personal histories, interacts with this environment through the practices of training.

Field procedures

- Data will be generated through observations of training sessions, individual interviews with staff and volunteers and a focus group.
- I will act as a volunteer to contribute to the charity for participating in the research and to become more familiar with the culture and practices within each case. My role as a volunteer also provides me with the credentials needed to gain the trust and access to the charity.
- Correspondence with participants will initially take place through my main staff contact at each case. Following this individual correspondence will be done via email.
- I will keep a research journal to keep a note of my reflections and thinking during the data generation and analysis process.

Case study questions

1. What is the role of the charity environment on the process of learning for volunteers being trained for service-providing roles?
   a. How do the experiences, emotions and knowledge of volunteers interact within training?
   b. What are the subjective perspectives of the volunteers (R. Engestrom, 1995) on their learning?
   c. How is the volunteer work organised and how does training contribute to this division of labour?
   d. What tools mediate the learning process?
2. In what ways can this learning process be described as transformational?
   a. What is the perceived outcome of training for both volunteers and the charity?
   b. Are there any conflicts or tensions?

A guide for the case study report

- Each case will be analysed individually and then a cross-case analysis will synthesis findings.
- Data will be analysed drawing upon the theoretical framework

Appendix 2: List of research participants

<table>
<thead>
<tr>
<th>Case</th>
<th>Pseudonym (male / female)</th>
<th>Length of time volunteering</th>
<th>Volunteer activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS1</td>
<td>David (m)</td>
<td>20 years</td>
<td>Ambassador, blood pressure, stroke groups</td>
</tr>
<tr>
<td></td>
<td>Glenn (m)</td>
<td>3 years</td>
<td>Ambassador, blood pressure, stroke groups, driver</td>
</tr>
<tr>
<td></td>
<td>Keith (m)</td>
<td>3 years</td>
<td>Ambassador, blood pressure, stroke groups</td>
</tr>
<tr>
<td></td>
<td>Carmel (f)</td>
<td>6 years</td>
<td>Stroke groups</td>
</tr>
<tr>
<td></td>
<td>Jerry (m)</td>
<td>11 years</td>
<td>Ambassador, blood pressure, stroke groups, driver</td>
</tr>
<tr>
<td></td>
<td>Noel (m)</td>
<td>6 years</td>
<td>Ambassador, blood pressure, stroke groups</td>
</tr>
<tr>
<td></td>
<td>Hazel (f)</td>
<td>7 years</td>
<td>Ambassador, blood pressure, stroke groups</td>
</tr>
<tr>
<td></td>
<td>Greg (m)</td>
<td>3 years</td>
<td>Blood pressure, stroke groups, driver</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Length of time working at charity</th>
<th>Staff role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gillian (f)</td>
<td>8 years</td>
<td>Volunteering advisor for England</td>
</tr>
<tr>
<td>Eiliyah (f)</td>
<td>10 months</td>
<td>Regional volunteer support and training</td>
</tr>
<tr>
<td>CS2</td>
<td>Length of time volunteering / years</td>
<td>Volunteer activities</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------</td>
<td>----------------------</td>
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<tr>
<td></td>
<td>Stephanie (f) 2 months</td>
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</tr>
<tr>
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<td>Sophia (f) 1 year</td>
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</tr>
<tr>
<td></td>
<td>Terry (f) 2 months</td>
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</tr>
<tr>
<td></td>
<td>Rebekah (f) 2 months</td>
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<tr>
<td></td>
<td>Hayley (f) 2 months</td>
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<tr>
<td></td>
<td>Shauna (f) 2 months</td>
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<tr>
<td></td>
<td>Gina (f) 2 months</td>
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<td></td>
<td>Justine (f) 4 months</td>
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<tr>
<td></td>
<td>Harmony (f) 7 months</td>
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<th>Length of time working at charity</th>
<th>Staff role</th>
</tr>
</thead>
<tbody>
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<td>Klara (f) 5 years</td>
<td>Counsellor, volunteer manager, trainer</td>
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<tr>
<td></td>
<td>Nadja (f) 7 years</td>
<td>Trainer</td>
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<th>Volunteer activities</th>
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<td>Service user representative, public events</td>
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<td></td>
<td>Kayla (f) 6 months</td>
<td>Group spaces, public events</td>
</tr>
<tr>
<td></td>
<td>Jacqueline (f) 25 years</td>
<td>Community speaking, public events</td>
</tr>
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<td></td>
<td>Brett (m) 1 year</td>
<td>One-to-one support, public events</td>
</tr>
<tr>
<td></td>
<td>Michael (m) 10 months</td>
<td>One-to-one support, public events</td>
</tr>
<tr>
<td></td>
<td>Alejandro (m) 6 years</td>
<td>Group spaces, public events</td>
</tr>
<tr>
<td>Name</td>
<td>Length of time working at charity</td>
<td>Staff role</td>
</tr>
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<td>----------</td>
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<td>Alex (f)</td>
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<td>Volunteer manager</td>
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<tr>
<td>Joshua (m)</td>
<td>3 years</td>
<td>Service advisor</td>
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Appendix 3: Focus group emails

Initial focus group email for CS2

Dear volunteers,

My name’s Sarah and I am currently studying for a PhD at the University of Manchester in the area of volunteer learning and training within charities. As a volunteer myself I think this is an important area that is currently under researched.

As part of my research I’m hoping to get a group of volunteers together to discuss their experiences of training for the helpline at [CS2]. It will take place on [DATE] at [TIME] at [CS2] in the downstairs training room. As well as contributing to a new area of research, the focus group will also be an opportunity to meet other volunteers and provide feedback on your experiences of volunteer training within [CS2] so far. Unfortunately I can’t offer any payment for joining the discussion but I will bring lots of refreshments!

If you are interested in coming along just reply to sarah.darley@manchester.ac.uk and I will send you some further information.

Thanks a lot for your time everyone and I really hope some of you will be able to make it to the focus group.

Best wishes,

Sarah

Individual focus group emails

Dear ----

Thank you so much for signing up to come along to the focus group I’m running at [CS2] next week regarding volunteer training. I’m attaching some further information about the research and the focus group activity to this email and will also bring along some printed copies on the day. If you have any questions at all after reading the information sheet please don’t hesitate to get in touch with me.

The focus group will take place at [CS2] on [DATE] at [TIME]. The aim of the focus group is to discuss your experiences of volunteer training within [CS2]. What we
discuss in the focus group will mainly go towards my PhD thesis and I also hope it will
be useful to [CS2] in terms of future development of volunteer training. As well as
contribute to a new area of research, the focus group will also be an opportunity to
meet other volunteers and provide feedback on your experiences of volunteer training
within [CS2] so far. Unfortunately I can’t offer any payment for joining the discussion
but I will bring lots of refreshments!

Thanks so much again and I look forward to seeing you next Thursday.

Kindest regards,
Sarah

Appendix 4: Research journal

Extracts from my research journal written throughout the study, which provided a tool
for reflexivity.

13 March 2014

Today I attended the CS1 volunteer conference. As I haven’t started volunteering with
the charity yet it was a good opportunity to hear more about the charity and see what
the volunteers are like. The good thing is that in all my three charities the volunteers
are very diverse. CS2 is all women, of all ages but mainly mid twenties to mid thirties,
CS3 is mixed gender, more males and mixed ages and CS1 is mixed gender, mainly
older volunteers. CS3 and CS1 have a lot of service users, particularly CS1.

I got talking to a few volunteers and made some contacts. One volunteer had been
volunteering for 13 years and his video on his stroke experience is used in training (an
example of where volunteers are contributing to training resources?). It will be useful to
see whether this is done anywhere else in training sessions or materials. All the
volunteers I spoke to were previous service users and most were long term, often
volunteering for 10 years or more.

The workshops I attended were ‘Raising awareness of stroke and life after stroke’ and
‘Aphasia etiquette and communication. Volunteers in the sessions seemed eager to
talk about their own personal experiences of strokes. Some new awareness
educational material was passed around and the volunteers gave feedback about the
lack of age diversity in the illustrations. The workshops outlined how new medical
findings and research keep changing the landscape that volunteers need to be trained
in, which is similar to all of my charities. This must create a challenge for charities – to
keep their training up-to-date and responsive to changes. On volunteer spoke to me at
the end of the conference and said he’d been involved as a volunteers for about 30 years. He goes out to groups to initiate changes in training that were not always well received. However, he said he had been asked to do it because he had been volunteering for such a long time. In CHAT terms the division of labour was being used to overcome tensions and possible contradictions in rules of the system.

Reflections on my volunteering experiences

CS1 Communication Group: April 2014

This was the first session out of a block of eight and lasted an hour and a half. Six stroke survivors and two carers attended. As it was the first session most of the time was spent introducing everyone and finding out about each other. I was the only volunteer there and I wasn’t totally sure what to expect in the session or what was expected of me. I knew it was to help stroke survivors with communication skills, but there was quite a range of communication abilities, with some individuals seemingly able to speak without too many problems and some struggling to say anything.

Although this group intended to provide communication support and activities, participants spoke a lot about their own experiences of stroke. One women started crying when she was talking about her stroke and said that her daughter told her she wishes she had died. Others spoke of how alone they felt and depressed. It’s quite difficult to know how to deal with those kinds of disclosures and as a volunteer and it may be possible in those situations for volunteers to say something that could make a person feel worse – which shows how important training is. There also is the issue of confidentiality as people are disclosing very personal information – even in smaller conversations one stroke survivor told me all about the trouble his niece was having with social services in a lot of detail. This also indicates how safe service users feel in these spaces.

Some wider challenging issues came up during the short session. One was that a carer thought one survivor looked too young to have had a stroke, which is one of the myths that CS1 fight against. My thought on this are in any groups where you have vulnerable service users there are a plethora of issues that volunteers need to deal with and these can arise unexpectedly. This requires some preparation and training for volunteers to be able to deal with sensitive situations without making the situation worse or upsetting themselves. However in dealing with vulnerable service users it is impossible to prepare for everything.
CS2 Helpline shift: November 2014

Multiple issues come up on the helpline – calls are not just sexual violence, and sometimes that is not even brought up in the conversation. What seems more common is for callers to talk about things like eating disorders, physical illnesses, medication and so on. There are also lots of repeat callers to the helpline and callers in distress.

Thinking about the idea of contradictions within CHAT and my own experience or examples of contradictions has made me realise the vital part emotions plays within them. Thinking about phone calls I received on the helpline – what caused the contradiction is the emotion felt. If the emotion wasn’t there would be no contradiction. And this emotion is connected to the past history – if there was no history the emotion would be different – fleeting maybe, certainly not as powerful.

CS3 Event briefing: August 2015

Tonight I attended a ‘briefing’ session for volunteers helping at a large public event, which CS3 is very involved in. Lead volunteers attended but had had a separate briefing, due to their extra responsibilities. There was a mixture of old and new volunteers and some volunteers who had volunteered at the event before. The session was only three hours but included a variety of activities – some group work, some presentations led by two staff members and two event interns. There was an emphasis on raising awareness and challenging stigma and it was made clear that this is what is expected of all volunteers within the organisation. The lead volunteers have quite an important job with a lot of responsibility (I wonder what their motivations are?).

The organisation has a clear view of what they want volunteers to do at the event and the roles they want them to perform. Volunteers will be the public face of the organisation – at an event which is aimed at the population who are considered to be more at risk of HIV. I think I would be a lot more nervous in my role at this event if I had not been already volunteering at the charity and knew it well. The volunteers I spoke to during the session had also already been volunteering and I’m not sure there was anyone there who had not volunteered at the organisation before.

Reflections after interviewing David (CS1), 24/10/2014

I noticed that D wasn’t always clear that I was specifically asking about training within the charity and not general training. I must make sure I make this clear at the beginning of all interviews.
A few tensions (possible contradictions?) arose within the interview – learning on the job vs. providing a professional service. D didn’t seem to consider training to be that instrumental in how he had learnt to do his role but then said he couldn’t have done it without the training.

D spoke about being “the face and voice of stroke” and how people believed what you told them when you went out representing the charity. This face image was similar to what Nadja spoke about in CS2 when she said volunteers should have the same face to callers on the phone.

D outlined a few situations where it was important to know how to handle them – answering questions from the public – what you were “allowed” to say.

I feel that the interview schedule worked well – it was open enough for D to direct the conversation but had enough prompts for me to steer it back when needed. Stories came up that did not immediately appear relevant, but they might be of interest when looking at them again during analysis.

**Reflections after interviewing Joni (CS2), 8 December 2014**

It occurred to me today that until now I have seen my position as a fellow volunteer and my history with the charity as an advantage and a way of building rapport and gaining the trust of my participants. However today I was thinking that because of my position volunteers in CS2 might assume I know everything about training already as I am an existing volunteer and not think of mentioning certain things or try and position their experience of training in a certain light. I’ve got no particular evidence for this so far but it is just a possibility I have become aware of.

The passion for volunteering has come across in all my interviews so far. J talked about the challenge of talking about sexual violence every week which could be draining and make her feel sad. However the desire to become a volunteer and do something worthwhile and the inspiration that the trainers provided helped overcome this challenge. The session on the law came up again – it had come up previously in Nadja’s interview and in the focus group (less so in Terry’s interview – possibly because of her previous professional experience).

The training had had a definite outcome for J as she had enrolled in a counselling course after it had finished. It was also useful hearing examples of how she was using the active listening and empathy skills in her professional role. J had recently also become a harassment advisor at work and had volunteered to do sexual harassment cases. Another example of spreading awareness?
The social aspect of training came up very much in this interview.

On reflection I think I could have probed more about the law session – perhaps what did they say that made you feel depressed? I did feel I probed sufficiently around challenges and things that were helpful.

Reflections after interviewing Brett (CS3), 16/05/2015

Importance of the role – B talked about information as being a case of life or death. B talked about how some cultures believed that you could be cured of HIV if you prayed to God and if people didn’t get the correct information about treatment they would die. This was a good example of how important these volunteers are to service users and also the wider community.

The theme of ongoing training was very strong in this interview – learning on the job, learning from other volunteers and staff.

Training as an incentive to continue volunteering. This has been mentioned a few times in CS3 and was in my thoughts initially when I started the research. However it was mentioned less in the other two cases – I wonder why it is more prominent in this case?

Appendix 5: Focus group schedule

The following outline of the focus group schedule was adapted from Wilkinson and Birmingham (2003, p.103).

1. Participation information sheets and consent forms were discussed with each participant individually before the focus group started.
2. Introduction: I gave an overview of what the focus group intended to cover and the research aim.
3. Ground rules were discussed on how the focus group would be conducted, including:
   a. How people wanted to show they want to speak.
   b. Reassurance that no one should feel forced to talk.
   c. Confidentiality was agreed on but it was made clear that in a group this cannot be guaranteed. Therefore no one should share anything they felt was very private or sensitive.
d. Participants were free to reveal their own personal experiences if they wanted to, but it was made clear that they should not reveal anybody else’s (e.g. other volunteers or service users not present).

e. It was acknowledged that there might be differences in opinion and this would be fine. Hearing different opinions was one of the reasons for interviewing the participants as a group.

4. These ground rules intended to encourage an environment of open discussion. This planning intended to avoid sensitive or difficult topics arising in the focus group (Barbour and Kitzinger, 1998).

5. I introduced myself again and reminded the participants of the purpose of the focus group and what would happen to the data. I checked that it was ok to begin audio recording the session.

6. I asked everyone to introduce themselves and to say how long they’ve been volunteering at the charity and their activities as a volunteer. As well as easing the participants into the focus group and into the discussion, this also provided a voice check for transcription (ibid.).

7. Main question areas included:

   a. **Training:** What kind of training volunteers had been involved in, their reasons for participating and any previous relevant knowledge they had.

   b. **Thoughts about training:** What volunteers enjoyed/not enjoyed about training, whether they had experienced any challenges and whether they would change anything about the training.

   c. **Use of training:** Whether the training had helped volunteers in their volunteering activities and whether they had found it useful or not beyond volunteering.

   d. **Future needs:** If volunteers felt they needed any other training and any other resources that help them perform their volunteer role.

   e. **Any other comments:** This was an opportunity for volunteers to add anything not yet covered regarding training or their experience of volunteering.

8. At the end of the focus group I thanked everyone for coming and outlined the next steps of the research. I said I would send out the notes of the focus groups to everyone who had attended and reminded the participants that they could contact me if they had anything further to add.
Appendix 6: Interview protocol for volunteers

Introduction

- Give out PIS form and explain research. Ask for consent using the consent form. Any questions?
- Explain the structure of the interview.
- Explain that there are no right or wrong answers, I’m not judging you or judging the training. I’m interested in your experiences and your thoughts towards training within the charity.

Warm up questions

- How long have you been volunteering here?
- Can you tell me a little bit about the role you do?

Training

- Can you tell me about the training you have participated in?
- What did the training involve?
- Reasons for undertaking training?

Learning / construction of own practices

- Do you think you had any relevant experience before starting the training? (if so ask for further details)
- Can you tell me about any ways in which you were able to draw upon this experience during the training? (were you able to share this with any other volunteers?)
- Did you encounter anything that was very different to something you had previously learned or had experience of? (How did you overcome that?)
- Are there any ways in which the training challenged or changed your perceptions of stroke / sexual violence / HIV?
- Can you tell me about anything you encountered in the training that felt very new to you? (memorable part of training?)
- Can you tell me about any new information or knowledge you felt you gained in the training?
- What would you say were the most challenging areas within the training? (how / were these resolved?)
- Do you feel like there were there many opportunities for you to learn from other (new/existing) volunteers?
• Did you feel able to contribute in any way to the training?
• Is there anything that you did throughout the training to support your own learning?

Perceived outcomes

• Can you tell me about any ways in which you have applied what you learned in training?
• What’s your overall opinion of the training? (likes/dislikes, what has been helpful/unhelpful, anything that could be changed?)

Would you like to say anything else about your training experiences that we haven’t already covered?

Closure: Thank the interviewee for their time and let them know the next steps.

Appendix 7: Interview protocol for charity staff

Introduction

• Introduce myself and the research using the PIS. Ask for consent using the consent form. Any questions? Explain the structure of the interview.
• Reassure participant I’m not evaluating the training or judging it as good or bad.
• Say that although I have some knowledge about the charity and the training as a volunteer there myself, I'll be asking questions to get their perceptions so I'm not just writing my own opinion.

Warm up questions

• Can you tell me a little bit about what CS1/2/3 does?
• What is your role within the charity? (How long have you been involved in the charity? How has your role developed with this time?)

Provision of general training

• Is training provided to anyone joining the charity? (staff or volunteers)
  o Delivery type, resources, staff involved?
  o Are staff and volunteers ever trained together?
**Provision of volunteer training**

- What kind of activities do volunteers contribute to within the charity? *(you might want to talk about the volunteers you’re particularly involved with)*
  - What is the importance of these activities?
  - Are any specific skills or knowledge required for any roles?
- Can you tell me about the training that you’re involved with for volunteers?
  - Is training provided for all volunteers?
  - Is training compulsory for any volunteer roles?
  - How is training given to volunteers? *(delivery type, resources, staff involved)*
- Do volunteers contribute to training provision? If yes, in what ways? *(e.g. creating resources, delivering training sessions, peer support).*
- How are training programmes/courses developed?
- Do you get feedback from volunteers? If yes how is this feedback used?
- Is the performance of volunteers monitored in any way during training?
- Are volunteers assessed? Do they receive feedback? Does this assessment form part of the volunteer selection or induction process?
- Have you experienced any **challenges or difficulties** in providing training to volunteers?
  - If yes prompt for further details
  - In your experience, how do you think these challenges are overcome?
- How important do you think it is to provide training to volunteers?
  - What do you think are the main outcomes of training volunteers?

Reflection of main points covered and check whether the participant would like to add anything further.

**Closure:** Thank the interviewee for their time and let them know the next steps.

**Appendix 8: Document authenticity**

*From Clark 1967 (in Handcock and Algozzine, 2011, p.58)*

Clark (1967, pp. 238–239) suggests asking the following questions regarding documents used in a case study:
1. Where has the document been and what is its history?
2. How did the document become available (public domain, special considerations)?
3. What guarantee exists that the document is appropriate, accurate, and timely?
4. Is the integrity of the document without concern? Has the document been changed in any way?
5. Is the document representative under the conditions and for the purposes it was produced?
6. Who created the document and with what intention?
7. What were the sources of information (original source, secondary data, other) used to create the document?
8. Do other sources exist that can be used to confirm the information in the document?

Appendix 9: Data in Nvivo

Management of data in Nvivo.
Appendix 10: Research dissemination and training

Presentations

PhD Year 3 (2015-16)

16 – 18 November 2015  Opportunities for lifelong learning within volunteering
Paper presented at the 8th Annual International Conference of Education, Research and Innovation, Seville (Spain)

18 November 2015  The Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) Doctoral Fellow
Selected as one of ten Fellows for the Doctoral Fellows Seminar at ARNOVA’s 45th Annual Conference, Chicago, IL (United States) (unfortunately I was unable to attend)

13 November 2015  Volunteer training in health and social care charities: Findings from research
Presentation and discussion of my PhD research at the Greater Manchester Centre for Voluntary Organisation (GMCVO) Third Sector Research Network

8 – 9 September 2015  Transforming the world and themselves: The learning experiences of volunteers being trained within health and social focused charities in England
Paper presented at the NCVO/VSSN/IVR Voluntary Sector and Volunteering Research Conference, Leeds

PhD Year 2 (2014-15)

15 – 16 July 2015  “It changed the way I think about the world”: Experiences of volunteers training within health and social charities
Paper presented at the Nonprofit Academic Centers Council 2015 Conference at DePaul University in Chicago, IL (United States)

19 May 2015  Training as transformation
Presentation at the Pint of Science festival: CHAT Show: Cultural Historical Activity Theory
Kro Bar, Manchester. A public engagement event to share educational research that draws upon social theories of learning. Part of an international science festival.

10 – 11 Sept 2014  Reconceptualising volunteer training as a transformative, collective process
Paper presented at the NCVO/VSSN/IVR Voluntary Sector and Volunteering Research Conference at Sheffield Hallam University. Also invited to speak as a new researcher on the closing plenary panel
PhD Year 1 (2013-14)

29 – 30 May 2014  
*Exploring expansive forms of learning within volunteer training*

Paper presented at the Kaleidoscope Conference: Opening up the Ivory Tower, University of Cambridge

31 January 2014  
*Volunteer training and the impact of educational technologies*

Paper presented at an Interdisciplinary Symposium at the University of Manchester

10 – 11 Sept 2013  
*An exploration of factors that impact on the use of ICT to train health and social care volunteers in England*

Paper presented at the NCVO/VSSN/IVR Voluntary Sector and Volunteering Research Conference at Sheffield Hallam University

Research methods training

PhD Year 2 (2014-15)

July 2015  
University of York: Seminar on volunteering and learning

April 2015  
University of Manchester: Telling stories about research

April 2015  
University of Manchester: Comparative Research with Qualitative Comparative Analysis

May 2015  
University of Manchester: PGR writing retreat

May 2015  
British Educational Research Association: CHAT: Possible Futures – Advancing Research in Cultural Historical Activity Theory

March 2015  
University of Manchester: Nvivo workshop

Feb 2015  
University of Manchester: Using evidence to test theories

Dec 2014  
University of Manchester: Engaging qualitative material

PhD Year 1 (2013-14)

July 2014  
National Centre for Research Methods: 6th ESRC Research Methods Festival

July 2014  
University of Manchester: The logic of real social-science arguments using Nvivo and critical thinking using qualitative data

June 2014  
University of Manchester: Critical Thinking using Qualitative Data and Software

April 2014  
Voluntary Sector Studies Network: Learning to Present Research of the Voluntary Sector and Volunteering

April 2014  
University of Manchester: Focus group workshop
March 2014  University of Manchester: Qualitative software planning
Feb 2014  North West Doctoral Training Centre: Researching for a Literature Review
Nov 2013  University of Manchester: Academic writing
Nov 2013  University of Manchester: Using theoretical frameworks in research

MSc Educational Research (awarded with distinction) University of Manchester, 2012-2013

Taught modules included:

- Critical Reading and Writing
- Qualitative Data Generation
- Qualitative Data Analysis
- Quantitative Data Generation
- Quantitative Data Analysis
- Planning of Research

Appendix 11: Participant Information and Consent Sheets

Participant Information Sheet: Observations

You are being invited to take part in a research study as part of a PhD project exploring the learning experienced by volunteers during training within a charity. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Please ask if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.

Who will conduct the research?

Sarah Darley, Manchester Institute of Education, School of Environment, Education and Development, University of Manchester.

Title of the Research

Exploring learning within volunteer training

What is the aim of the research?

The research will explore the training of volunteers within charities and aims to gain insight into learning within this context.

Why have I been chosen?
You have been chosen because you are a staff member in a health or social charity that delivers training to its volunteers. Two other charities will also be participating in this research.

What would I be asked to do if I took part?

To allow me to sit in and observe how you deliver volunteer training in up to two training sessions. You will not be asked to do anything except your normal training delivery and I will observe as quietly and unobtrusively as possible. I may take some notes as part of the observation, as long as this is not disruptive or inappropriate to the training sessions. I will only be observing how training is delivered and I will not be observing individual volunteers and the questions or discussions they might have. Any sensitive or personal information that is discussed in the training session will not be included in my observation notes.

What happens to the data collected?

Data will be analysed by myself and reported on in my PhD thesis, which will be submitted to the University of Manchester. Findings may also be referred to in my wider PhD study, which may include journal publications, conference presentations and other dissemination to relevant fields.

How is confidentiality maintained?

No individuals or charities will be named in the write up of this research and pseudonyms will be used if any names are needed. Any notes made during the observation will be kept securely on my computer and only accessed by myself.

What happens if I do not want to take part or if I change my mind?

It is up to you to decide whether or not to take part. If you do decide to take part you will be given this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw at any time without giving a reason.

Will I be paid for participating in the research?

No payment will be made for taking part in the research.

What is the duration of the research?

Observation of one volunteer training session.

Where will the research be conducted?

The observation will take place at the location of the charity where you deliver volunteer training.

Will the outcomes of the research be published?

There are no immediate plans to publish this research, but it may be referred to in future publications or dissemination relating to my wider PhD study. Confidentiality within the data will still be maintained at all times.

Contact for further information
Me (the Researcher): Sarah Darley, sarah.darley@postgrad.manchester.ac.uk

My supervisor: Dr Andrew Whitworth: drew.whitworth@manchester.ac.uk

What if something goes wrong?

For help or advice regarding participating in the research, please contact me: Sarah Darley, sarah.darley@postgrad.manchester.ac.uk

If there are any issues regarding this research that you would prefer not to discuss with myself or my supervisor, please contact the Research Practice and Governance Co-ordinator by either writing to 'The Research Practice and Governance Co-ordinator, Research Office, Christie Building, The University of Manchester, Oxford Road, Manchester M13 9PL', by emailing: Research-Governance@manchester.ac.uk, or by telephoning 0161 275 7583 or 275 8093
Exploring learning within volunteer training in three health and social charities

CONSENT FORM

If you are happy to participate please complete and sign the consent form below:

1. I confirm that I have read the attached information sheet on the above study and have had the opportunity to consider the information and ask questions and had these answered satisfactorily.

2. I understand that my participation in the study is voluntary and that I am free to withdraw at any time without giving a reason.

3. I agree that any data collected may be passed to other researchers.

4. I agree that any data collected may be published in anonymous form in academic books or journals.

I agree to take part in the above project.

Name of participant ___________________________ Date ___________________________ Signature ___________________________

Name of person taking consent ___________________________ Date ___________________________ Signature ___________________________
Participant Information Sheet: Focus groups

You are being invited to take part in a research study as part of a PhD project exploring the learning experienced by volunteers during training within a charity. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Please ask if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.

Who will conduct the research?

Sarah Darley, Manchester Institute of Education, School of Environment, Education and Development, University of Manchester.

Title of the Research

Exploring learning within volunteer training in three health and social charities

What is the aim of the research?

The research will explore the training of volunteers within charities and aims to gain insight into learning within this context.

Why have I been chosen?

You have been chosen because you are a volunteer that has undertaken (or is undertaking) training in a health or social charity. Approximately 30 volunteers across three charities will be participating in this research.

What would I be asked to do if I took part?

To participate in a focus group including up to 10 other volunteers from the same charity as you, to discuss experiences regarding volunteer training. You will only be asked to share experiences and opinions that you are happy to discuss within the group and will not be expected to discuss anything that you would like to keep private or do not feel comfortable talking about.

What happens to the data collected?

Data will be analysed by myself and reported on in my PhD thesis, which will be submitted to the University of Manchester. Findings may also be referred to in my wider PhD study, which may include journal publications, conference presentations and other dissemination to relevant fields.

How is confidentiality maintained?

No individuals or charities will be named in the write up of this research and pseudonyms (fake names) will be used to attribute any quotes used. Any audio recording made will only be accessed by myself and will be destroyed after the research has been written up. Notes and transcripts from the focus group will be kept securely on my computer and only accessed by myself.

What happens if I do not want to take part or if I change my mind?
It is up to you to decide whether or not to take part. If you do decide to take part you will be given this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw at any time without giving a reason.

**Will I be paid for participating in the research?**

*No payment will be made for taking part in the research.*

**What is the duration of the research?**

*One focus group lasting no longer than two hours.*

**Where will the research be conducted?**

*The focus group will take place at the location of the charity you volunteer within.*

**Will the outcomes of the research be published?**

*There are no immediate plans to publish this research, but it may be referred to in future publications or dissemination relating to my wider PhD study. Confidentiality within the data will still be maintained at all times.*

**Contact for further information**

*Me (the Researcher): Sarah Darley, sarah.darley@postgrad.manchester.ac.uk*

*My supervisor: Dr Andrew Whitworth: drew.whitworth@manchester.ac.uk*

**What if something goes wrong?**

*For help or advice regarding participating in the research, please contact me: Sarah Darley, sarah.darley@postgrad.manchester.ac.uk*

If there are any issues regarding this research that you would prefer not to discuss with myself or my supervisor, please contact the Research Practice and Governance Co-ordinator by either writing to 'The Research Practice and Governance Co-ordinator, Research Office, Christie Building, The University of Manchester, Oxford Road, Manchester M13 9PL', by emailing: Research-Governance@manchester.ac.uk, or by telephoning 0161 275 7583 or 275 8093
**CONSENT FORM**

If you are happy to participate please complete and sign the consent form below:

1. I confirm that I have read the attached information sheet on the above study and have had the opportunity to consider the information and ask questions and had these answered satisfactorily.

2. I understand that my participation in the study is voluntary and that I am free to withdraw at any time without giving a reason.

3. I understand that the focus group will be audio recorded.

4. I agree to the use of anonymous quotes.

5. I agree that any data collected may be passed to other researchers.

6. I agree that any data collected may be published in anonymous form in academic books or journals.

I agree to take part in the above project

Name of participant	 Date	 Signature

Person taking consent	 Date	 Signature
Participant Information Sheet: Interviews

You are being invited to take part in a research study as part of a PhD project exploring the learning experienced by volunteers during training within a charity. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Please ask if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.

Who will conduct the research?

Sarah Darley, Manchester Institute of Education, School of Environment, Education and Development, University of Manchester.

Title of the Research

Exploring learning within volunteer training in three health and social charities

What is the aim of the research?

The research will explore the training of volunteers within charities and aims to gain insight into learning within this context.

Why have I been chosen?

You have been chosen because you are a staff member/volunteer involved in training in a health or social charity. Approximately 30 volunteers and six staff members from across three charities will also be participating in this research.

What would I be asked to do if I took part?

To participate in an interview on your experience of undertaking or providing volunteer training. You will only be asked to share experiences and opinions that you are happy to discuss with the interviewer and will not be expected to discuss anything that you would like to keep private or do not feel comfortable talking about.

What happens to the data collected?

Data will be analysed by myself and reported on in my PhD thesis, which will be submitted to the University of Manchester. Findings may also be referred to in my wider PhD study, which may include journal publications, conference presentations and other dissemination to relevant fields.

How is confidentiality maintained?

No individuals or charities will be named in the write up of this research and pseudonyms (fake names) will be used to attribute any quotes used. Any audio recording made will only be accessed by myself and will be destroyed after the research has been written up. Notes and transcripts from the focus group will be kept securely on my computer and only accessed by myself.

What happens if I do not want to take part or if I change my mind?
It is up to you to decide whether or not to take part. If you do decide to take part you will be given this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw at any time without giving a reason.

**Will I be paid for participating in the research?**

*No payment will be made for taking part in the research.*

**What is the duration of the research?**

*One interview lasting up to 90 minutes.*

**Where will the research be conducted?**

*The interview will take place at the location of the charity you volunteer or work within.*

**Will the outcomes of the research be published?**

*There are no immediate plans to publish this research, but it may be referred to in future publications or dissemination relating to my wider PhD study. Confidentiality within the data will still be maintained at all times.*

**Contact for further information**

*Me (the Researcher): Sarah Darley, sarah.darley@postgrad.manchester.ac.uk*

*My supervisor: Dr Andrew Whitworth: drew.whitworth@manchester.ac.uk*

**What if something goes wrong?**

*For help or advice regarding participating in the research, please contact me: Sarah Darley, sarah.darley@postgrad.manchester.ac.uk*

If there are any issues regarding this research that you would prefer not to discuss with myself or my supervisor, please contact the Research Practice and Governance Co-ordinator by either writing to 'The Research Practice and Governance Co-ordinator, Research Office, Christie Building, The University of Manchester, Oxford Road, Manchester M13 9PL', by emailing: Research-Governance@manchester.ac.uk, or by telephoning 0161 275 7583 or 275 8093
Exploring learning within volunteer training in three health and social charities

CONSENT FORM

If you are happy to participate please complete and sign the consent form below:

1. I confirm that I have read the attached information sheet on the above study and have had the opportunity to consider the information and ask questions and had these answered satisfactorily.

2. I understand that my participation in the study is voluntary and that I am free to withdraw at any time without giving a reason.

3. I understand that the interview will be audio recorded

4. I agree to the use of anonymous quotes

5. I agree that any data collected may be passed to other researchers

6. I agree that any data collected may be published in anonymous form in academic books or journals.

I agree to take part in the above project

Name of participant  Date  Signature

________________________________________  __________________________  __________________________
Name of person taking consent  Date  Signature
Appendix 12: Annotating the data in Nvivo

An example of annotations on interview data in Nvivo.

ME: for the [NAME] speaking did you have any training on that?

J: Yes. With I and working with [NAME] speakers and discussing things that might come up and how we'd deal with them and things like that [says she can't remember how long it was as it was a while ago and laughs]. But then for a time we also had quite regular meetings as well where we'd share what happened at different venues because it can go quite differently with different audiences and the venue. So that's very useful and I think really that's like ongoing training and then we'd have as I'm sure you know, quite regular meetings but that often involves an element of training, we'll break into small groups and do group work and answer questions and sometimes we're asked to move round the room and look at different questions as we go round. Discuss things and then everybody feeds back so it's quite a dynamic way of training and I think it keeps people interested in more things that are going on and it's also getting a picture of what we as volunteers and service users are feeling are the most pressing issues as well.
Appendix 13: Coded data within context in Nvivo

Example of data coded ‘emotion’ in the context of the focus group transcript in Nvivo.

G: Till.
D: A thousand hours of lectures.
G: So good it feels, you know, yeah.
K: I mean the other aspect of it that is neglected of course is the emotional side.
G: Yeah.
K: I just touched on it there.
G: Yeah yeah.
D: Yes.
K: Er the emotions that people have in stroke, not just the survivor but the carer as well. You get that full gamut of emotions.
D: Yes.
K: Going through. I've likened it you know in a couple of talks to the same, from a survivor point of view, the same aspects of grief over [slight pause] you know - grief from a death.
D: Oh yes yes.
K: Means you're going through those same, exactly those same patterns of things. Denial and all these.
D: Exactly.
Appendix 14: Coding scheme

The final coding scheme is presented below, including notes on whether the code came from the data (D) or from the theoretical framework (TF):

ACTIVITY (of volunteering) (TF)
- Knowledge (D)
- Practice (training) (D)
- Shared understanding (discourse, charity and volunteers, volunteers with other volunteers, trust in the knowledge given) (D)
- Dynamism (TF)
- Tools (TF)

SUBJECTS (TF):
- Historicity (includes volunteers abstract and concrete knowledge, things they come into training ‘with’) (TF)
- Emotion (TF)
- Voices (perspectives, including service users) (TF)
- Desire (D)
- Learning (as reified, includes skills) (D)
- Imagination (TF)

OBJECT (Never individual always social, arising from history) (TF)
- Societal challenge (generalised, social need) (TF)
- Awareness raising (D)
- Values (specific, personal sense of the object that motivates an individual actions, value placed on the ‘work’) (TF)

DIVISION OF LABOUR (TF)
- Subjectivity (position of subjects, agency, trainers, trainees, volunteers, staff) (TF)
- Guided participation (More able partner, shadowing, learning from existing volunteers, resources like technology and books) (TF)
- Relational (including shared experience, relationships) (TF)

CULTURE (TF)
- Historicity (charity, cause) (TF)
- External environment (D)
- Unique environment (as opposed to work or other areas of volunteers lives) (D)
- Entry (into volunteering and the organisation) (D)

OUTCOME - NEW POSSIBILITIES (might be imagined or actual) (TF)
- System transformation (increased capacity) (TF)
- Collective transformation (outside the system) (TF)
- Individual transformation (action or a change in thought or behaviour) (TF)
- Becoming (ongoing process, self-reflection, identity) (TF)
- Conflict (includes the gap between training and practice, may indicate contradictions) (TF)
RULES (TF)

- Acceptance (norms) (TF)
- Boundaries (TF)
- Regulations (the correct thing to say and/or do) (TF)
- Expectations (D)

Appendix 15: Coding memo

Example of a reflective analytical memo written in Nvivo for the code *conflict.*
Appendix 16: Interrogating the data using the Nvivo matrix tool

A screenshot of a matrix created in Nvivo to view all data coded *emotion* for each case.
Appendix 17: Report of findings

The report of research findings shared with CS2. This report was emailed to the charity staff member and shared and discussed with volunteers and the trainers at a volunteer meeting.

Research into volunteer training: Findings so far

Contents

1. Motivations for training "I don’t want to do it badly"
2. Thoughts about the trainers: “Trained by experts”
3. Thoughts about training: “Rehearsing in a safe environment”
4. Challenges “You can’t fix it”
5. Outcomes “It changed the way I think about the world”
6. Suggestions for future training

1. Motivations for training “I don’t want to do it badly”

Although the training is mandatory for volunteers wanting to work on the helpline, there were additional motivations for undertaking it. This included:

- Desire to do a ‘good job’ as the work is seen as so important
- Building on professional experience: this included working within the area of sexual violence as well as wider skills such as active listening skills and dealing with people.
- Change in life circumstances (e.g. retirement, career change)
- A desire to learn new things, especially in an area of interest
- Chance to gain new skills
- A general desire to volunteer and “to make the world slightly better”. Some volunteers had previous experience of volunteering, including working on other helplines

The training was described as “a comprehensive programme” and the length of the training was seen as validating the work and helped get across the impact a volunteer could have working on the helpline.

2. Thoughts about the trainers: “Trained by experts”

- Volunteers had a lot of confidence in the trainers and valued them sharing experiences of calls and personal experiences.
- Hearing how the trainers would respond to different calls and phases they use was very useful
- Throughout the training volunteers felt able to ask questions and go to them for support if needed.
Volunteers described the trainers and all the work that they did as being inspiring. The trainers also inspired career aspirations in some volunteers. Volunteers felt included and valued by the organisation – one volunteer mentioned how appreciated she felt that lunch was provided during the Saturday sessions.

3. Thoughts about training: “rehearsing in a safe environment”

Role-plays

- Described as both the most challenging and most useful part of the training: “the only way to learn, to feel confident in doing that and to process it all and actually put it into action.”
- Both watching the trainers performing role-plays and doing role-plays themselves was helpful for volunteers.
- Getting feedback from the trainers when doing the role plays was valued
- Provided volunteers with the opportunity to learn from each other (especially in the observer role). For example, hearing how each other responds and developing together - particularly if volunteers worked in the same trio every week.
- Along with other parts of the training, the role-plays helped get across the perspective of a survivor

Boundaries

- Learning how to hold boundaries as a volunteer was important and the physical demonstration by the trainers was highlighted as very useful.
- Learning about the boundaries of the organization and policies on certain issues was also useful: “we were given quite firm boundaries, you know as an organisation we do this, we don’t do that and it takes away having a dilemma about how you respond.”
- This contributed to volunteers feeling strong in their opinions which helped them in feeling able to challenge callers on the phone (when needed)

Shadowing: “hearing how a real volunteer does it!”

- Helped resolve some of the anxieties around the role and increased understanding that volunteers are not there to solve people’s problems.
- Useful in hearing other volunteers’ rhythm on the phone and listening to what they say, which actually could be a lot less than in the role-plays.

Other helpful parts of the training

- The emphasis on self-care being “part of the structure of what you do” was valued by volunteers
- Being in the company of other women who were interested in the same issues “Sitting in a room with twenty other women – when do you ever do that in your life!”
- Opportunities to talk to existing volunteers about the calls they had taken
- Opportunities to talk to volunteers within the training course about challenging sessions
• Some volunteers found the psychological models helpful in developing understanding
• Training was described as not ending once the training sessions end, as support is always available within the organisation and being able to discuss calls with someone afterwards is seen as a form of ongoing training. For this reason some volunteers don’t feel like they have to wait for support meetings to get support as they can get one-to-one support as and when they need it.
• Volunteers supported each other after training with one volunteer setting up meetings and a shadowing rota for the training group and possibly a buddy system. This was seen as a way of forming a connection and feeling involved with the organisation, rather than being on the outskirts coming in once a month to do a shift.

4. Challenges: “You can’t fix it”

• A lot of volunteers described the law session as the most challenging session as it was seen as a “more relatable” topic where there is “no happy ending” and there is “the realisation that these crimes are going to go unpunished”, which is unfair and frustrating. It was seen as being part of the cause of violence as perpetrators know they can get away with it. However for some volunteers this provided even further motivation to do the role.
• Understanding the scope of the role, and that it is primarily listening and there is no “doing”.
• Self-reflecting and self-analysing throughout the training is challenging but volunteers saw this as necessary as that is what they will be asking callers to do.
• The organisation’s view on self-harm as a creative outlet to keep a woman alive was new to some volunteers and took a bit of time to understand.
• Talking about sexual violence for three hours every week or all day on a Saturday: “It does leave you feeling drained”. The grounding techniques helped with this challenge, as did the support from the whole group and from the trainers. Having time in the whole group at the end of each session to sit with each other and reflect on what had been covered was valued. The group felt like a safe space, particularly as confidentiality was discussed in the first session.
• The unavoidable gap between training and going on the helpline: “The training can’t give you the first call and the training can’t tell you what calls you’re going to get because it’s life and it’s spontaneous and it’s random and you never know what’s going to be on the end of the phone. But it gives you the most skills it possibly can to put you in the right position to deal with that.”

5. Outcomes “it changed the way I think about the world”

The training was seen as vital preparation for going on to the helpline, but it also had wider outcomes for some volunteers in their personal and professional lives.

Skills and knowledge

• Active listening skills and phrases taken from the training were applied in volunteers’ personal and professional lives and generally in day-to-day interactions.
• Acknowledging the importance of self-care in professional life
• Skills and knowledge gained in the training were also applied in other voluntary work (like other helplines)
• Using techniques from the training for volunteer’s own emotional well being and those around them (for example grounding techniques)

Career and professional work

The training contributed towards and inspired a new career direction for some volunteers, including:

• One volunteer has taken on a harassment advisor role at her work that includes sexual harassment, which she feels she would not have done without completing the training. The same volunteer has also signed up to a counseling course which she hadn’t considered before. The training had made her feel empowered and it had been something she had enjoyed. She also saw it as a good starting point if she wanted to go into a different career.
• Another volunteer feels that the experience she gained from the training will help her in applying for postgraduate study in the area of social work.
• Another volunteer changed career aspirations after completing the training and now wants to work in the area of sexual violence

Perceptions of sexual violence: “There’s aware and there’s aware”

• Volunteers spoke about being already aware of the facts and statistics on sexual violence but that training and regularly discussing the issues within training challenged them to accept those facts and also increased understanding about the deep impact on individual lives.
• Sexual violence was something that volunteers said they wouldn’t normally discuss in everyday life so talking about it regularly had led to a greater awareness and helped to clarify their opinions.
• Training encouraged reflection on and changes within personal conduct – for example refusing to laugh at certain jokes or make snap judgments. It also provided confidence to talk about sexual violence and to challenge things. “The only way that this is going to get better if it’s not this secret, shameful thing.”

Other outcomes

• Increased confidence speaking in a group
• Pride in being part of the organisation and for completing the training
• Training helped volunteers understand the limitations of the charity (e.g. one phoneline and very few paid staff)
• Training was seen as a way of raising awareness of sexual violence: “it’s not just about taking somebody from A to B and getting them ready for a helpline, it’s about spreading the word”

5. Suggestions for future training

• Further guidance on providing constructive feedback within the role plays (although some volunteers liked the “looseness” of the feedback)
• Further support within the caller role within the role-plays
• More role-plays demonstrated by the trainers, particularly for difficult calls
• Having more opportunities to learn from each other, particularly as volunteers had a range of different experiences and professions.
• Refresher sessions to keep knowledge up to date (particularly things like the law or DID). Volunteers thought the regular volunteer meetings would be useful.
- Some volunteers said they would like information sheets that they could refer to after training, as well as the handouts they received.
- It was observed that the group of volunteers within the training group was not very diverse.

**Appendix 18: Matrix in cross-case analysis**

An extract from the matrix created in cross-case analysis to compare emphasis of different themes.

<table>
<thead>
<tr>
<th>Case number</th>
<th>Dynamic Object</th>
<th>Unique position of volunteers</th>
<th>Historicity</th>
<th>Transformation</th>
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<tbody>
<tr>
<td>CS1</td>
<td>Multi voiced</td>
<td>Expands possibilities for the charity</td>
<td>Other subjects’ personal experiences</td>
<td>Subjects feel part of the object – ‘becoming’</td>
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<tr>
<td>CS1</td>
<td>Emotion</td>
<td>Moving across boundaries</td>
<td>Historicity: beliefs</td>
<td>Changing perspective of object (both as attainable and unattainable) – ‘becoming’</td>
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<td>CS2</td>
<td>Emotion</td>
<td>Historicity positions volunteers within the system</td>
<td>Imagination</td>
<td>Historicity: beliefs</td>
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<td>CS3</td>
<td>Re-orchestration of voices</td>
<td>Crossing of boundaries of volunteers and service users</td>
<td>Within the charity</td>
<td>Continuously changing object</td>
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### Appendix 19: Data generation timetable

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Appendix 20: Visual display of data for each case

Codes and data for each case presented visually.

Case 1: CS1