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## **Knowledge Sharing in Context: the case of Volunteer Development at a Heritage site**

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**Abstract:** This paper offers insights into the role and processes associated with knowledge sharing, as part of the development of volunteers at a substantial heritage site. The marked growth in the numbers and importance of volunteers in the heritage sector in the UK has fuelled interest and research in volunteer management, but researchers have paid little attention to the important area of the processes through which volunteers develop the skills and knowledge that they need to deliver their role. In order to contribute to addressing this gap, this paper reports on research conducted at a major heritage site in the UK. Data was gathered through onsite interviews with management and focus groups with volunteers. Questions explored the sources of knowledge utilised by volunteers, the knowledge sharing processes involved and how this contributed to their development. Whilst some managers are more committed to embedding learning opportunities in the everyday volunteering experience than others, and volunteers vary in their interest in developing new skills or transferring their existing knowledge and skills into their role as a volunteer, there is a general acknowledgement that knowledge sharing is pivotal to volunteer development. Informal learning was found to be the principal vehicle for the acquisition of knowledge by volunteers. This took place in many situations such as shared breaks, mentoring and community of practice situations, although the nature of volunteer roles determined the extent of social contact. Managers were fully aware of their critical role in knowledge sharing and attempted to facilitate such informal learning through formal and informal mentoring whilst also instigating some formal training and cascading information. Volunteers also took the initiative in setting up a dropbox for knowledge sharing, and in managing a social club, both of which they regarded as a vehicle for networking, informal learning and benchmarking. However, volunteers were less enthusiastic about the introduction of an intranet specifically for volunteers.

**Keywords:** knowledge sharing; volunteer development; heritage sector; volunteers; learning

Knowledge is a critical organizational resource that provides a sustainable competitive advantage in a competitive and dynamic economy. Organizations must therefore consider how to transfer expertise and knowledge from experts who have it to novices who need to know.

### **1. Introduction**

There is a widespread acknowledgement that knowledge sharing between employees is central not only to the development of the knowledge and skill of individual employees, but to the performance of the organisation (Cabrera and Cabrera, 2005; Davenport and Prusak, 1998). However in spite of the growing awareness of the benefits of knowledge sharing in commercial and public sector organisations (Connelly and Kelloway, 2003; Al Alawi et al., 2007) and the need to transfer knowledge to those who need it to perform their roles (Kharabsheh et al., 2016), there has been very little research interest in knowledge sharing by volunteers, and only limited interest in the broader area of volunteer development. Indeed, there are conflicting views as to whether volunteers are knowledge workers, with Drucker (1989) asserting that they are, since volunteers are starting to take over managerial and professional jobs, and moving from non-profit volunteers to unpaid professionals, and, in contrast, Pearce (1983) adopting the stance that volunteering is a part-time pastime where specific skills are not necessary. However, in the face of the significant growth in numbers of and dependence on volunteers in recent years it is evident that the contribution of volunteers is becoming ever

more pivotal to the success of many organisations in sport, health, religion, community, heritage and the environment. For example, in the UK in recent years, volunteering has been seen as a way of implementing government policy, with substantial sums being allocated to volunteer infrastructure (Rochester et al., 2016). This is reflected in the latest statistics on volunteering which suggest that 41% of people in the UK took part in formal volunteering at least once a month in 2015-2016 and 60% informally volunteered during the same period (Community Life Survey, 2016). Furthermore, the estimated value of volunteer output to the UK was 23.9 billion in 2012, which equated to 1.5% of GDP (Foster, 2013).

Some authors have expressed reservations regarding the efficacy of treating volunteers as employees (Newton et al., 2014) due to the nature of rewards, their rather different formal and psychological contractual relationship with the organisation and the predominant part-time nature of their involvement (Cnaan and Cascio, 1998; Nichols, 2013; Fallon and Rice, 2015). However, there is an increasing body of research into the motivation, retention and engagement of volunteers (e.g. Garner and Garner, 2010; Vecina et al., 2011; Pi, et al., 2014) and some suggestions that training and other HRM processes enhance retention of volunteers (Cnaan and Cascio, 1998; Cuskelly et al., 2006). This paper seeks to contribute to this research, and to extend research on knowledge sharing to the voluntary sector through a study of knowledge sharing in a large UK heritage site that is heavily reliant on volunteers. More specifically, the aim of this paper is to offer insights into the importance of, and processes associated with knowledge sharing in volunteer development in the heritage sector.

## **2. Literature Review**

### *2.1 Knowledge sharing*

A considerable amount of research on knowledge sharing between paid employees often in the context of multinational companies has taken place. This has focussed on how knowledge sharing can assist organisational performance which in turn can lead to competitive advantage (Cabrera and Cabrera, 2005; Davenport and Prusak, 1998). Such knowledge can be classified in two distinct ways. Tacit knowledge is embedded in personal experience whilst explicit knowledge is easily be codified onto databases (Polyani, 1969; Newell et al, 2009). Early approaches to knowledge sharing emphasised the sharing of explicit knowledge through IT systems, although Davenport and Prusak (1998) emphasise the growing importance of sharing tacit knowledge. Wenger (2004) stresses the importance of communities of practice in this process, whilst the importance of regular face-to-face sharing are highlighted by Al Saifi et al. (2016). Virtual communities of practice now have a significant presence in large organisations but trust between members takes longer to develop (Ardichvili et al., 2003). More recently, social media has been utilised as a tool for sharing explicit knowledge although Panahi et al. (2012) believe it can also facilitate sharing of tacit knowledge. However, some older adults opt out of using such tools because of concerns about privacy (Chakraborty et al., 2013).

Moreover, according to Selwyn et al. (2003) older adults are less likely to use information technology due to the fact that many are physically and psychologically disadvantaged in this area. Factors affecting knowledge sharing have been often been grouped into organisational and individual categories (e.g. Bock et al, 2005; Carter and Scarbrough 2001). Nonaka (1994) believes that tacit knowledge can be converted into explicit knowledge by a process of externalisation, although this assertion has been disputed by Tsoukas (2002).

### *2.2 Volunteers and learning*

Learning opportunities are vital for staff whether they are paid or work in a voluntary capacity and for some volunteers can contribute to their aspirations for lifelong learning (Findsen, 2016). Mundel and Schugurensky (2008) conducted research into learning processes of volunteers in Canadian community organisations. On this basis, they proposed a classification of volunteer learning into: learning from civic engagement, instrumental

learning (acquisition of task related knowledge and skills), learning to work together and learning about the volunteering role. They also noted that whilst some of this learning could be promoted by formal training characterised by the sharing of explicit knowledge (Smith, 2001), for volunteers much of the learning was informal, and therefore often undervalued. The importance of informal learning, often embedded in formal or informal mentoring and supervising relationships in volunteering contexts has also been confirmed in other studies (Hager and Brudney, 2004) and Holmes (2006) suggests that there is evidence of widespread mentoring of volunteers. Mentoring is a means of passing on both explicit and tacit knowledge, and therefore is a type of knowledge sharing, although Broadbridge (1999) suggests that there is a potential for acquiring bad habits through the mentoring process. Indeed, Gagne (2009) suggests that volunteers may share knowledge more freely than employees, due to their autonomous motivation. On the other hand, research by Ragsdell et al. (2014) suggests that the fragmentation and lack of codification of knowledge in the voluntary sector (Letteiri et al., 2004) results in knowledge being retained tacitly to be called upon when the occasion demands.

### **3. Methodology**

#### *3.1 Case context*

This paper is based on a major heritage site featuring a stately mansion. The venue is managed by a team of around 40 full-time and 50 seasonal staff, including a General Manager and other heads of department responsible for specific areas, such as the house, the gardens, the estate, and the visitor experience. This full-time team is supported by a considerable number of volunteers, some of whom contribute to more than one area of the work of the site. Volunteers are managed by paid volunteer managers. Many of these managers are taking on a challenging role early in their careers in the heritage sector, and themselves benefit from appropriate support and development. In addition, the role is challenging due to the number of people with whom the volunteer managers need to interact, their varying levels of commitment, and their diverse backgrounds and skills. In addition to the volunteer managers, the larger teams also have day organisers, who are volunteers and assist staff in coordinating the team and the rota. The organisation invests heavily in the training, development and support of both the volunteer managers and the day organisers

#### *3.2 Research process*

The researchers conducted five focus groups with volunteers and six interviews with managers at the site during June 2016. The arrangement of the focus groups and interviews and invitations to the participants were organised and implemented by the Volunteer Development Manager for the property. Focus groups with volunteers centred on an exploration of the different sources of knowledge that they needed to perform their roles. Interviews with managers mirrored these themes along with their role in knowledge sharing and volunteer development. All participants were briefed on the purpose of the project, assured that all comments would be treated in confidence, and signed a consent form. Participation was voluntary, which may limit the representativeness of the findings, but, nevertheless the research does offer some interesting insights. All focus groups and interviews were recorded and transcribed, prior to thematic analysis guided by the themes in the interview and focus group schedules. Thematic analysis focused on sources of knowledge that contributed to volunteer development. These were formal training, learning resources, informal learning and own research.

### **4. Findings**

Interviews and focus groups focussed on the ways in which volunteers acquire the knowledge they need to perform their roles. Informal learning proved to be the primary process and was central to discussion with both volunteers and managers, although formal training was emphasised slightly more by managers.

#### 4.1 Formal training

Most managers viewed the development of volunteers as central to their role often linking recruitment and selection to job roles.

*"[We], make sure we select the right volunteers, and then assist with inducting them into the role as Room Guides and then further developing their interests and making sure that they're happy in their role.... it's fulfilling for them" (INT5).*

Some volunteers were on a work placement scheme. With these volunteers, managers stressed their commitment to training and career skills and the acquisition of industry recognised qualifications in operating machinery. Succession planning, which involved one-to-one skill training was also mentioned by a manager of one of the outdoor teams. On the other hand, whilst some (more recently appointed) volunteers had participated in a formal induction programme, for the majority, job shadowing had been the main component of their introduction to their role:

*Just shadowing people; picking up how different people have different approaches, working out how you would like to actually use you own personality and the way that you treat people or approach people (FG3).*

Several volunteers, particularly in Ranger and Estate roles recognised that they received the appropriate Health and Safety briefing and job related training particularly in areas such as machine operation. Some were also involved in inducting other volunteers, which they were generally happy to do, although there were some misgivings about being given responsibility for others, particularly without remuneration.

*"I'm not sure that we as volunteers should be in loco parentis, I think that's a bit of a questionable situation because we're not paid to take responsibility" (FG 5).*

However, other volunteers were happy to rely on the skills amassed from their career in order to fulfil a role managing other volunteers.

*"I'm using skills there that I already had, again because I was in a management job and it's the day leader role in the house which is sort of managing the volunteer team, doing the rota for them and so on, which is quite similar to some of the jobs that I used to do at work previously" (FG 4).*

Volunteer managers generally recognised the importance of their own role in sharing knowledge but this varied according to department. Business Support saw this as more a cascade exercise from insights gained at regional meetings, whereas some departmental managers particularly in outdoor roles cited the importance of creating a team ethos and a culture of experienced hands helping new volunteers in a sociable environment. They also realised that this fruitful learning experience amongst volunteers allowed them more time to devote to the other elements of their role.

#### 4.2 Learning resources

The parent organisation has recently been providing access to an online portal through which volunteers can claim any expenses, keep themselves informed as to events and developments, and access local, and national training materials. However, there is some resistance amongst volunteers to the use of this portal:

*"I've certainly heard at one of the meetings people saying 'I don't bother claiming anymore, I can't be doing with this computer!' 'I can't be doing with this computer business!' I can understand that" (FG 5).*

Volunteers prefer the more informal information and knowledge sharing that occurs through weekly briefings, annual briefings and meeting room notice boards. The general office was also cited as a useful information hub. The staff there were very much aware of the importance of their role in sharing information:

*"I think the fact that we're all based in the Estate office and people can just walk in you know whereas sometimes we find that volunteers will come to us rather than go to their manager and the manager gets a bit cheesed off...." (INT 2).*

### 4.3 Informal Learning

Informal learning was very much in evidence. Advice is freely given and volunteers quickly learned the identity of the most knowledgeable colleagues in a particular area. Volunteers also tend to have their break with other volunteers in designated rooms and this arrangement plays an important part in facilitating informal learning.

*"Yeah it's very informal, I mean the guy that I went round with when I started I still know and see so he's a fount of all knowledge so I'll ask his advice ...."(FG 3)*

However, this type of knowledge exchange tended to be situational and depended on the nature of the volunteering role. Volunteer Rangers have much more solitary existence than room guides who come into contact with their colleagues much more frequently.

*"Yes, well there aren't that many patrolling Rangers each day so you may occasionally see them or you may not" (FG 3).*

Volunteers were keen to expand their knowledge of the property overall and some performed multiple roles which gave them the opportunity to share their knowledge.

*"The roles I do now; I'm one of the day leaders in the house, I also room guide in the house, I'm one of the office assistants, the volunteer office assistants helping out in the office and occasionally I drive the minibus as well" (FG 4).*

Some volunteers were aware of their own value to the organisation and the life experience they brought to the role, and were keen to testify how the organisation was keen to promote sharing knowledge.

*"I've been here 17 years, so I have more knowledge than any of the permanent staff and they don't object to that, they want me to share that knowledge" (FG 2).*

One volunteer recounted how a research group had developed as a result of an organisational initiative to offer additional more specialist talks to the public.

*"So each year we independently research new subjects. In the group I am working with, we pool those ideas and we then present a basic story about whatever it may be, but in our words. We might add little bits of our own personal research" (FG 2).*

The same group of volunteers also set up an informal knowledge repository using dropbox for articles to help enhance the learning of other members of the group which in turn can be passed on to members of the public.

*"We have a team of tour guides and we have set up our own dropbox in which we put articles, but it's really just for dissemination amongst us guides so that we can share our knowledge to pass that on to.... visitors" (FG 2).*

Many volunteers were enthusiastic about the socialising and networking opportunities at their social club. Its value as a vehicle for informal learning and benchmarking was also recognised.

*"I would say that social club members have a great deal of knowledge and they also go out, they do groups, you know I don't have the time to be a member but they go out to other sites within the organisation and they come back with lots of ideas of what could be done here" (FG 1).*

Although the club is organised by volunteers, staff are invited to take part in events and managers recognise the role of the club as a channel for communication and co-operation.

*"...And I think it's kind of in their constitution to promote better working relationships between the staff and volunteers as well" (INT 2).*

#### **4.4 Own research**

Many volunteers were keen to highlight their own research. This was more apparent in the groups that worked in the house itself, although botanical research was also mentioned.

*"I mean I already knew and I didn't realise I knew until visitors asked me things because I've read quite extensively around and because you're interested in something you remember things and you go further. And... if you're interested in something you research it" (FG 1).*

This was particularly the case with room guides, some of which had been part of an initiative to provide in-depth talks about particular aspects of the mansion. On some occasions managers noticed that this was organised as an informal team (which seemed to be along the lines of a community of practice) where skills gained previously were utilised towards the success of a historical research project.

*"I think there were some teachers, architects, all sorts of different backgrounds, that they kind of went off and researched their own little area," (INT 5).*

## **5. Discussion and conclusions**

The centrality of informal learning to volunteer development was emphasised by both volunteers and managers. Volunteers frequently experienced learning on shared breaks and as part of teams, although the nature of their roles defined the amount of contact with others. This mirrors the findings of Mundel and Schugurensky (2008) who discovered that much of the learning in their own study of a volunteer community was similarly informal. Knowledge shared within informal learning processes is tacit in nature (Polyani, 1969), and the critical importance of sharing such knowledge to improve organisational performance has been widely affirmed (Cabrera and Cabrera, 2005; Davenport and Prusak, 2005).

Other forms of tacit knowledge sharing were very much in evidence. Volunteers formed a research group that demonstrated the characteristics of a community of practice. Members of the group, although from different career backgrounds, came together to pursue a shared interest in discovering and disseminating the history of the mansion. An unofficially by the group dropbox application was used (Mallman et al., 2016) as an attempt to convert the research findings into explicit knowledge (Nonaka, 1994). Furthermore, volunteers were

enthusiastic about the networking and social benefits of regular meetings of their own social club and trips to other heritage sites. Al Saifi et al. (2016) suggests that face-to-face interaction brings multiple benefits for the knowledge sharing process.

Formal training often results in the sharing of explicit knowledge (Smith, 2001) and this was mentioned by managers in connection with the attainment of transferrable qualifications. However, many volunteers perceived their training as having been mainly job shadowing with a mentor. There is also evidence of the extensive mentoring of volunteers as suggested by Holmes (2006) in both informal learning situations and placement of volunteers in teams by managers. The importance of informal learning through a mentoring relationship has been affirmed by Hager and Brudney (2004) and can result in the transfer of both tacit and explicit knowledge, but it is also possible that bad habits can be easily acquired from a mentor (Broadbridge, 1999).

In terms of sharing explicit knowledge, the organisation has been moving towards an intranet system specifically designed for volunteers. However, many older volunteers prefer more traditional means of sharing knowledge such as face-to face, notice boards and printed briefings and these are continuing for the time being. Selwyn et al. (2003) suggest that older adults are generally much less likely to use information technology because of physical and psychological disadvantages.

There was no evidence of the fragmentation of knowledge purported by Letteiri et al. (2004) to be characteristic of the non-profit sector, although it may be relevant that Letteiri's research was performed in a context of high volunteer turnover. In fact, managers demonstrated a clear understanding of their pivotal role in sharing knowledge but operationalised this in different ways informally within their own team and as part of a pyramid of communication. Volunteers depicted an open sharing environment where experts were identified and keen to share their knowledge.

The implications for managers is that upskilling of longer serving volunteers could be considered as well as some training in using the intranet system. This could be performed by more computer literate volunteers. Further opportunities to deploy their research skills may also be welcomed by many volunteers, given their enthusiasm, and benefit the customer experience.

Further research could usefully focus on further similar studies within smaller sized heritage properties or within different heritage organisations who also utilise volunteers in order to understand contextual differences in knowledge sharing processes in the sector. Research could also consider the link between the motivation of volunteers and their willingness to share their knowledge. Furthermore, many studies of knowledge sharing in commercial and public organisations have focussed on factors affecting sharing such as organisational culture and trust. A similar study could be performed in a volunteer context.

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